

# Change and Continuity in Social Protection in Latin America

*Mothers at the Service of the State?*

*Maxine Molyneux*

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## Acronyms

<b>DAC</b>	Development Assistance Committee
<b>ECLAC</b>	Economic Commission for Latin America and the Caribbean ( <i>Comisión Económica para América Latina y el Caribe/CEPAL</i> )
<b>FEMOCCPAALM</b>	La Federación de Mujeres Organizadas en Centrales de Comedores Populares Autogestionarios y afines de Lima Metropolitana
<b>GDP</b>	gross domestic product
<b>IDB</b>	Inter-American Development Bank
<b>IFI</b>	international financial institution
<b>IFPRI</b>	International Food Policy Research Institute
<b>IMF</b>	International Monetary Fund
<b>NGO</b>	non-governmental organization
<b>NSP</b>	New Social Policy
<b>OECD</b>	Organisation for Economic Co-operation and Development
<b>PAN</b>	Partido de Acción Nacional ( <i>National Action Party</i> )
<b>PFA</b>	Programme for Action
<b>PRD</b>	Partido de la Revolución Democrática ( <i>Party of the Democratic Revolution</i> )
<b>PRI</b>	Partido Revolucionario Institucional ( <i>Institutional Revolutionary Party</i> )
<b>PRONAA</b>	Programa Nacional de Asistencia Alimentaria ( <i>National Food Assistance Programme</i> )
<b>PRSP</b>	Poverty Reduction Strategy Paper
<b>SAP</b>	structural adjustment programme
<b>SEDESOL</b>	Secretaría de Desarrollo Social ( <i>Secretariat of Social Development</i> )
<b>UN</b>	United Nations
<b>UNDP</b>	United Nations Development Programme
<b>UNIFEM</b>	United Nations Development Fund for Women
<b>UNRISD</b>	United Nations Research Institute for Social Development
<b>US</b>	United States
<b>WDR</b>	World Development Report

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The research on which this paper is based was carried out during two visits to Peru in 2001 and 2003, and on field visits to the Oportunidades programme in Mexico in July 2005, to Huachinango, San Miguel de Tenango and Zacatlán de las Manzanas. The Mexican study draws on conversations with, inter alia, Oportunidades Director Rogelio Hermosillo and Chief Programme Evaluator Concepción Stepa, as well as with beneficiaries (mothers and children) and *promotoras* (volunteer workers).

## Summary/Résumé/Resumen

### *Summary*

This paper has three main objectives. First, to describe the principal elements of new approaches to social policy in Latin America, in order to further understanding of the new forms of social protection that are evolving in the South. Second, to examine and contrast new and older models of poverty relief with specific reference to Latin America; and third, to ask what the implications of these policies and programmes are for those who have been among the most actively engaged in them, and who constitute a good proportion of their beneficiaries, namely low-income women.

Three main arguments are advanced in the paper. The first is that while evolving approaches to social protection in developing countries are routinely described as “neoliberal”, this descriptor is too broad to capture the changes in policy approaches that have taken place since the era of stabilization and adjustment. The “second and third waves” of reform have absorbed the language of equality, citizenship and participation, and while the scope of state action and expenditure was sharply reduced in the 1980s, there has been a slow if as yet inadequate recovery since then. Indeed, some policy analysts talk of a new era of welfarism, and of “working towards universalism”.

The second argument concerns the way that anti-poverty programmes function. While those developed in the 1990s are to a large extent state financed and managed, they depend for their functioning on refiguring state-society relations in ways that attempt to build on existing, or create new forms of, social control and engagement. In short, for all the talk of “hollowed-out states”, social relations and states continue to be of critical importance in securing the welfare of low-income populations, although in ways that are not sufficiently problematized – especially in regard to their gendered implications.

The third and central argument of the paper is that the terms of women’s incorporation into welfare systems in Latin America have always been strongly influenced by women’s symbolic and social roles as mothers. Currently evolving anti-poverty programmes are in the main, despite some adaptations to modern conceptions of citizenship, still premised on a gendered construction of social need and indeed have the effect of re-traditionalizing gendered roles and responsibilities. Thus the state is actively involved, through these programmes, in the structuring of asymmetrical and unequal gender relations, and this, it is argued, has long-term consequences for the satisfaction of social need.

The discussion is organized into two main parts: the first is concerned with Latin American social policy provision, before and after the structural reforms. It examines the ways in which women’s access to social rights was historically conditioned by their status as wives and mothers, and their position within the labour market as low-paid, unorganized and informalized workers. It then proceeds to identify the key elements of the New Social Policy and describes the newer aspects of poverty relief post-1985.

Part 2 opens with a discussion of the gender and poverty debate, and goes on to examine two contrasting Latin American poverty relief programmes, Progresas/Oportunidades in Mexico and the Comedores Populares in Peru, in an attempt to identify the different ways in which gender is, and has been, implicated in the design and management of poverty relief. These two cases are selected as they represent earlier and current approaches to poverty relief. Progresas/Oportunidades is generally taken as a model case for the new cash transfer anti-poverty programmes being developed in Latin America and has been widely emulated; the Comedores Populares evolved from a grassroots food distribution programme, to become an important safety net for the urban poor.

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## **Résumé**

Le présent document a trois objectifs. Premièrement, décrire les principaux éléments des nouvelles approches de la politique sociale en Amérique latine pour mieux comprendre les formes nouvelles de protection sociale que l'on voit apparaître au Sud. Deuxièmement, examiner et comparer les modèles, anciens et modernes, de réduction de la pauvreté en se reportant spécifiquement à l'Amérique latine et troisièmement, se demander ce qu'impliquent ces politiques et programmes pour celles qui s'y sont engagées le plus activement et qui constituent une forte proportion de leurs bénéficiaires, à savoir les femmes économiquement faibles.

Trois arguments principaux sont avancés dans ce document. Le premier consiste à dire que si les approches nouvelles de la protection sociale dans les pays en développement sont qualifiées, par routine, de "néolibérales", ce qualificatif est trop large pour rendre compte des changements de politiques qui se sont produits depuis l'époque de la stabilisation et de l'ajustement. Les "deuxième et troisième" vagues de la réforme ont assimilé le discours de l'égalité, de la citoyenneté et de la participation et, si les dépenses de l'Etat, comme son champ d'action, ont été fortement réduites dans les années 80, il y a eu depuis un redressement, bien que lent et encore insuffisant. Certains analystes politiques vont même jusqu'à parler d'une nouvelle ère de l'Etat providence et d'une "progression vers l'universalisme".

Le deuxième argument touche à la façon dont fonctionnent les programmes de lutte contre la pauvreté. Si ceux qui ont été mis en place dans les années 90 sont dans une large mesure financés et administrés par l'Etat, leur fonctionnement dépend d'un remaniement des rapports entre l'Etat et la société qui tente de s'appuyer sur des formes existantes de contrôle et d'engagement sociaux ou d'en créer de nouvelles. En bref, bien qu'il soit souvent question d'Etats "vidés de leur substance", les rapports sociaux et l'Etat demeurent d'une importance capitale pour la protection sociale des populations à bas revenu, bien que de manières insuffisamment problématisées – surtout pour ce qui est des répercussions sur les femmes.

Le troisième argument, qui tient une place centrale dans le document, consiste à dire que les conditions dans lesquelles les femmes ont été intégrées dans les régimes de protection sociale en Amérique latine ont toujours été fortement influencées par leur rôle symbolique et social de mère. Dans l'ensemble, les programmes de lutte contre la pauvreté que l'on voit apparaître actuellement ont encore pour postulat, malgré certaines concessions aux conceptions modernes de la citoyenneté, une construction sexospécifique des besoins sociaux et pour effet un retour aux rôles et aux responsabilités traditionnels des hommes et des femmes. Ainsi l'Etat participe activement, par ces programmes, à l'établissement de relations d'asymétrie et d'inégalité entre les sexes, ce qui, de l'avis de l'auteur, a des conséquences à long terme sur la satisfaction des besoins sociaux.

Le développement s'organise en deux parties principales: la première porte sur la mise en place des politiques sociales en Amérique latine, avant et après les réformes structurelles. L'auteur montre en quoi l'accès des femmes aux droits sociaux a été lié dans l'histoire à leur statut d'épouse et de mère, et leur position sur le marché du travail comme main-d'œuvre mal payée, mal organisée et non déclarée. A partir de là, elle tente de dégager les éléments essentiels de la nouvelle politique sociale et décrit les aspects que présentent les mesures de réduction de la pauvreté depuis 1985.

La deuxième partie commence par traiter de la dimension sexospécifique de la pauvreté, puis examine deux programmes latino-américains de réduction de la pauvreté, Progres/ Oportunidades au Mexique et les Comedores Populares au Pérou, qui présentent un assez fort contraste, pour tenter de montrer de quelles façons le genre est et a été impliqué dans la

conception et la gestion de la réduction de la pauvreté. Ces deux exemples ont été choisis car ils sont représentatifs de deux manières d'aborder la réduction de la pauvreté, l'une récente et l'autre plus ancienne. Progres/Oportunidades est généralement pris pour modèle des nouveaux programmes de transferts monétaires mis en place en Amérique latine pour faire reculer la pauvreté et a fait beaucoup d'émules. Les Comedores Populares, qui, à l'origine, distribuaient des vivres à la population locale, sont devenus un filet de sécurité important pour les pauvres des villes.

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### **Resumen**

El presente documento tiene tres objetivos principales. En primer lugar describe los elementos fundamentales de los nuevos enfoques sobre la política social en América Latina, a fin de comprender mejor las nuevas formas de previsión social que están tomando forma en el Sur. En segundo lugar analiza y compara las nuevas y viejas modalidades de alivio de la pobreza, con referencia específica a América Latina. Por último el documento analiza qué entrañan estas políticas y programas para quienes han estado participando más activamente en ellos y quienes constituyen una buena proporción de sus beneficiarios, a saber, las mujeres de bajos ingresos.

En este trabajo se presentan tres argumentos centrales. El primero es que los enfoques sobre la previsión social que están evolucionando en los países en desarrollo por lo general se describen como enfoques "neoliberales", calificativo demasiado amplio para reflejar todos los cambios que se han dado en los enfoques de política desde la época de la estabilización y el ajuste. Las "segunda y tercera olas" de reforma han absorbido el lenguaje de la igualdad, la ciudadanía y la participación, y aunque el alcance de la acción y de los gastos del Estado se redujo marcadamente en los años 80, desde entonces se ha dado una lenta (si bien aún inadecuada) recuperación. En efecto, algunos analistas de políticas hablan de una nueva era de "bienestarismo" y de "esforzándose por conseguir el universalismo".

El segundo argumento tiene que ver con la forma en que funcionan los programas de lucha contra la pobreza. Si bien los programas implementados durante la década de los 90 son en gran medida financiados y administrados por el Estado, su funcionamiento depende de la reformulación de las relaciones entre el Estado y la sociedad de forma de poder aprovechar los mecanismos existentes de control y participación social o crear nuevas formas de hacerlo. En pocas palabras, no obstante todo lo que se ha dicho sobre los "estados ahuecados", las relaciones sociales y los Estados siguen siendo de fundamental importancia para garantizar el bienestar de las poblaciones de bajos ingresos, si bien en formas que no han sido suficientemente planteadas y analizadas, sobre todo en relación con las implicaciones que tomen en cuenta las consideraciones de género.

El tercer argumento central de este documento es que las condiciones en las cuales la mujer se incorpora en los sistemas de bienestar social en América Latina siempre han acusado una marcada influencia de los papeles simbólico y social de la mujer como madre. Hoy por hoy, los programas de lucha contra la pobreza, no obstante algunas adaptaciones a los conceptos modernos de ciudadanía, continúan en lo esencial basados en una interpretación de la necesidad social desde la perspectiva del género, por lo que tienen el efecto de repetir las funciones y responsabilidades tradicionalmente definidas en virtud del género. El Estado, por lo tanto, participa activamente en la estructuración de relaciones de género asimétricas y desiguales a través de estos programas, lo que tiene consecuencias a largo plazo para la satisfacción de las necesidades sociales.

El análisis se ha organizado en dos partes principales: la primera se ocupa de la provisión de la política social en América Latina, antes y después de las reformas estructurales. Se examina la forma en que el acceso de la mujer a los derechos sociales estuvo históricamente condicionado por su situación de esposa y madre, así como por su posición en el mercado laboral como mano

de obra informal, no organizada y de baja remuneración. Seguidamente se procede a determinar los elementos clave de la nueva política social y se describen los aspectos más recientes del alivio de la pobreza en el período posterior a 1985.

La segunda parte comienza con un análisis del debate sobre género y pobreza, para luego examinar dos programas contrastantes de alivio de la pobreza en América Latina: el programa Progresas/Oportunidades en México y el programa de Comedores Populares en Perú, con el propósito de determinar las diferentes maneras en que el género incide, y ha incidido, en la concepción y la gestión del alivio de la pobreza. Progresas/Oportunidades se tiene generalmente como el modelo para los nuevos programas de transferencias monetarias para la lucha contra la pobreza que están formulándose en América Latina, muchos de los cuales han optado por emularlo. Los Comedores Populares nacieron de un programa popular de distribución de alimentos para convertirse en una importante red de seguridad social para los pobres urbanos.

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*If the state were a family, it would be assumed that welfare is a women's affair.*

*L. Gordon (1990:9)*

## **Introduction**

Social policy is commonly theorized as a domain of *state action* that is designed to secure, in its broadest sense, social reproduction. Most definitions identify social policy with the state practices and institutional forms that directly influence the welfare and security of the citizens of a particular society.<sup>1</sup> However, defining the state as the central locus of social welfare practices is, as is being increasingly recognized, both historical and normative. Within the scholarly debates on social policy, “statist” conceptions of welfare provision have tended to prevail in a debate whose contours were influenced by the experience of the welfare regimes of state socialism and Western Europe. In its strict sense of a state committed to high levels of social expenditure and a reasonable capacity to satisfy social need, welfare states of different kinds were consolidated in the Soviet Union in the 1930s, in many parts of Europe after the end of the Second World War and from the 1960s in post-revolutionary states such as China and Cuba.<sup>2</sup> However, in developing countries<sup>3</sup> with disarticulated economies, weak states and dispersed forms of demand making, social policy evolved in a more fragmented form and social welfare was secured or supplemented by other means. Such contexts rarely produced anything approximating universal social provision, and low-income populations were obliged to depend on some mix of formal and informal social institutions for their security. As research on household survival, social networks and voluntary institutions has shown, social reproduction is, in such cases, secured by a variety of social practices and institutions that exist independently of, or work in conjunction with, “state action”; yet this interface, if it is acknowledged at all, is rarely analysed in the social policy literature.

This absence is all the more striking, given recent policy trends in developing countries that are associated with a reduction in the realm of state action to accommodate an increasing role for the market and for non-state agencies in the delivery of social welfare. These new policies along with a more sober appreciation of pre-structural-reform state capacity, and of the history of welfare, require us to de-centre the analysis of social security from an exclusive focus on the state, and to include a broader consideration of *the social*. This does not, however, imply shifting to an exclusively society-centred approach since, as we shall argue, states retain a central and indispensable role in welfare.

This research paper has three main objectives: first, to describe the principle elements of new approaches to social policy in Latin America, in order to further understanding of the forms of social protection that are evolving in the South; second, to examine and contrast new and older models of poverty relief with specific reference to two Latin American case studies, Progresa/Oportunidades in Mexico and the Comedores Populares in Peru; and third, to ask what the implications of these policies and programmes are for those who have been among the most actively engaged in them, and who constitute a good proportion of their beneficiaries, namely low-income women.

Two main arguments are advanced: the first is that the evolving approaches to social policy that have accompanied the postadjustment era in developing countries—and summed up as the New Social Policy (NSP)<sup>4</sup>—do not so much replace the state as refigure state-society relations in

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<sup>1</sup> For a discussion of the problems of theorizing social policy in developing countries see, for example, Mkandawire (2004) and Gough et al. (2004), and for the varieties of capitalism literature, in particular, Huber (2002). On Latin America, see Huber (2002, 1996); Barrientos (2004); Mesa-Lago et al. (2000); Ziccardi (2004); and Filgueira (2005).

<sup>2</sup> For a comparative analysis of gender, citizenship and social rights in Latin America, the Soviet Union and Western Europe, see Molyneux (2000b).

<sup>3</sup> I use the term “developing countries” in full acknowledgement of its limitations.

<sup>4</sup> This term was first used by the World Bank but it has acquired a wider currency since; see, for example, Abel and Lewis (2002).

ways that attempt to build on, or create forms of, social self-reliance. For all the talk of “hollowed-out states” social relations *and* states continue to be of critical importance in securing the welfare of low-income populations, although in ways that are not sufficiently problematized—especially in regard to their gendered implications. The second argument is that the terms of women’s incorporation into welfare systems in Latin America are, and always have been, strongly influenced by their symbolic and social roles as mothers. The recently developed antipoverty programmes are in the main, despite some adaptations to modern forms of citizenship, still premised on a gendered construction of social need and, indeed, have the effect of retraditionalizing gendered roles and responsibilities.

The discussion is organized as follows: part 1 is concerned with Latin American social policy provision, before and after the structural reforms. It identifies the key elements of the NSP and describes the newer aspects of poverty relief post-1985. Part 2 opens with a discussion of the gender and poverty debate and goes on to examine and contrast two examples of poverty relief programmes in Mexico and Peru, respectively known as Progres/Oportunidades and Comedores Populares, in an attempt to identify the different ways in which gender is, and has been, implicated in the design and management of poverty relief. These two cases are selected as they represent earlier and current approaches to poverty relief: Progres/Oportunidades is generally taken as a model case for the new cash transfer antipoverty programmes being developed in Latin America;<sup>5</sup> and the Comedores Populares of Peru evolved from a grassroots food distribution programme to become an important safety net for the urban poor. To begin then with some background on social policy and on the reforms that led to the adoption of the NSP.

## **Part 1: Social Policy in Latin America**

### ***Social policy in Latin America prior to the reforms***

In Latin America as in much of the developing world, low tax revenues and weak commitments to redistributive policies ruled out the development of effective, universal welfare systems. Only five countries, Argentina, Chile, Costa Rica, Cuba and Uruguay<sup>6</sup> developed a form of welfare state and, with the exception of Cuba, none achieved universality of entitlement or coverage.<sup>7</sup> Philanthropic welfarism had existed in Latin America from the colonial period, but it was minimal in scale and was more often than not organized by the Catholic Church. Nonetheless, from the late nineteenth century, if to widely different degrees, some forms of social protection began to evolve in most countries of the region. These efforts principally concentrated on the education and health sectors and, where Bismarkian models were influential, as in Chile, state pension schemes, along with other forms of social insurance for privileged (predominantly masculine) sectors of the labour and armed forces, accompanied the process of postindependence state formation.

The liberal elites who governed much of Latin America in the late nineteenth and early twentieth centuries entertained positivist notions of the perfectibility of society and sought to secure this through a measure of state intervention. They increasingly recognized that a modern social order depended upon social integration and that states had some responsibility toward the people they governed—if only to ameliorate the conditions that caused or threatened to cause social discontent. From the early decades of the twentieth century, state activity increased as a result of successful demands for social reform, with an incremental assumption of social

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<sup>5</sup> Not only by the World Bank and the Inter-American Development Bank (IDB), but also in a wide variety of international public policy forums.

<sup>6</sup> Colombia and Venezuela could be included here according to some analysts. For overviews and analysis of Latin American social policy, see, inter alia, Abel and Lewis (2002, 1993); Abel (1996); Barrientos (2004); Filgueira and Filgueira (2002); Filgueira (2005); Mesa-Lago (1994); Mesa-Lago et al. (2000); Haagh and Helgo (2002); and Tulchin and Garland (2000).

<sup>7</sup> It is significant that this group includes a socialist (Cuba), a market (Chile) and a mixed economy (Costa Rica) model of welfare. See Mesa-Lago et al. (2000) for elaboration of these comparative observations.

responsibility by enterprises and governments. In the 1920s and 1930s, “improving the race” in order to secure the conditions for development became the leitmotif of the social reform and eugenics movements (Stepan 1991). As these ideas gathered strength in Europe and the United States (US), they also found adherents in parts of Latin America among the growing class of professionals who had an increasingly influential role in the legislature. Many women were among the promoters of “social hygiene” and its derivative *puericultura* (child development). They energetically supported policy and legal changes, which prepared the way for the social legislation of the populist states that followed.

Organized labour and its socialist and liberal supporters had from the early twentieth century secured some minimal protection and entitlements for formal sector workers in most countries of the region, but formal rights did not always equate to substantive rights and gaps persisted between the laws and the practice. The era of nationalist state-centred development under corporatist populism, inaugurated by the crisis of 1929 but more securely established in the postwar period, brought some expansion in entitlements for this sector, the natural constituency of corporatist regimes and a relatively privileged sector for long afterward. Corporatist ideas found favour with elites who supported reform and modernization, but who were concerned to address what they saw as the twin menace of class conflict and communism. For many statesmen at the time, the priority was to forge a national project that would meet the challenge of radical alternatives by securing a more inclusionary model of national development. Social rights correspondingly expanded in Argentina, Brazil and Mexico, and even when populist corporatism waned, the technocratic developmentalism that replaced it continued to support the growth of the social sector.

By the end of the 1960s all but the poorest states had established the main planks of social welfare, if at times in skeletal form. Health and education were publicly funded, and social insurance systems covered some categories of formal sector workers. Regional policies were now influenced by CEPALISTA<sup>8</sup> guidelines based on the ideas of the Economic Commission for Latin America and the Caribbean (ECLAC). These drew on human capital theory to anchor social policy more firmly in a discourse of development priorities, as Latin American states presided over a rapid expansion of literacy programmes and primary education (Filgueira and Filgueira 2002). At this time, too, the “basic needs” approach was gaining support, leading to some greater attention to “subsistence rights”<sup>9</sup> through the provision of food to the poor, sanitary works, potable water and affordable housing. Positive growth rates, rapid urbanization and social mobilization all caused Latin American states, irrespective of political inclination, to embark on programmes to meet rising social demands and expectations. These decades saw the Latin American region leading the developing countries in terms of social expenditure and social coverage. There was a corresponding improvement in human development indicators as life expectancy steadily increased and infant mortality declined to place Latin America by 1980 at the top of the developing regions (Filgueira and Filgueira 2002). While CEPALISTA developmentalism was associated with universalist principles, social policy provision in Latin America remained unevenly distributed between the richer and poorer states and within these, between rural and urban populations, as well as across sectors.<sup>10</sup> Entitlements, therefore, tended to follow local patterns of state formation with urban client groups as principal beneficiaries. Governments continued to find social entitlements useful in securing political support, whether from organized labour, the military, the bureaucracy or potentially troublesome occupational groups. Indeed, the high indices of poverty and inequality that prevail across the region have been linked to the phenomenon of weak states favouring corporate interests, along with

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<sup>8</sup> CEPALISTA (or CEPALINO) refers to the policies of ECLAC, a UN agency that was under the direction of Raúl Prebisch from 1950 to 1963.

<sup>9</sup> Subsistence rights can be understood as constituting access to items of social consumption, that is, goods and services such as housing and public transportation. See Eckstein and Wickham-Crowley (2003:19) for a discussion.

<sup>10</sup> Filgueira and Filgueira (2002) differentiated between countries or regions characterized by “stratified universalism” (Argentina, Chile, Uruguay), dual regimes (Brazil, Mexico) and exclusionary regimes (Bolivia, Ecuador and Dominican Republic and Central America, except Costa Rica).

clientelism and corruption in state service provision, rather than to the lack of public sector spending per se<sup>11</sup> (Tulchin and Garland 2000).

Despite the expansion of social provision that occurred from the 1960s, most of the region still suffered from poor and skewed coverage and low quality provision. The state sector was underfunded, and all too often blighted by poor administration with governments reactive to problems as they arose. Entitlements remained for the most part tied to formal employment with pensions available only to a minority of workers, with some insurance schemes for disability, unemployment and maternity. These arrangements did not cover the rural sector or the large proportion (sometimes as much as 40 per cent of the active population) that was in the informal sector or in domestic service, typically the largest employer of urban women. In 1980, some 130 million people or 33 per cent of the total population of Latin America lived below the United Nations (UN)-defined poverty line. Since the poor were either employed in the informal sector, or were seasonal workers or unemployed, they were unable to qualify for social insurance. Latin America's "conservative-informal" welfare regimes were based on corporatist favouritism in contrast to the developed universalism of the Northern European welfare states.<sup>12</sup>

In the lower income countries such as Bolivia, Ecuador, Guatemala, Nicaragua and Peru, and in some of the better-off states such as Brazil and Mexico, the situation was one of widespread poverty, sharp regional and ethnic inequalities, poor state provision, a weak entitlement framework and minimal and far from efficient safety nets. Organizational and managerial deficiencies added to the problem in many countries, exemplified in multiple and overlapping welfare institutions, legal complexity, statistical inadequacies and lack of coordination between departments (Mesa-Lago 1994:76). For those living in and on the margins of poverty – that is, up to half the population in half of the countries of the region in the 1990s – the principal safety net was emergency relief (food aid, primary health), family and kinship support, supplemented by the voluntary sector, comprising non-governmental organizations (NGOs), church-based relief and charitable organizations.

### ***Gender and social policy in Latin America***

If welfare provision in Latin America was segmented, the modes of incorporation into, and exclusion from, the entitlements available also had a gendered character. Women of different classes, social and spatial locations and ethnic origin were distributed unevenly across entitlement systems. However, as women they shared some commonalities of treatment defined by the gender order. In Latin America, as elsewhere in the world, gender bias and masculine prerogative prevailed in social policy as in social life more broadly, with entitlements resting on culturally sanctioned and deeply rooted notions of gender difference and patriarchal authority. These generally accorded with idealized assumptions about the asymmetric social positions occupied by the sexes with male breadwinners and female mother-dependents receiving benefits according to these normative social roles. Such assumptions have proved remarkably universal and enduring even where, as in Latin America, gender divisions have been modified by women's mass entry into the labour force and by equal rights legislation.

Social policy in Latin America was not, therefore, *gender blind* as some have argued,<sup>13</sup> but instead worked with deeply gendered conceptions of social needs, ones that were familial, patriarchal and paternalistic. While women gained access to education and health and entered

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<sup>11</sup> Although social policy was also constrained by governments' commitments to deficit spending.

<sup>12</sup> Barrientos (2004) argued that since the reforms, the dominant system to have evolved is a "liberal-informal" variant, Barrientos adapts Esping-Andersen's (1990) classic typology of the welfare state to explain this shift from the earlier corporatist, segmented social security system.

<sup>13</sup> The general paucity of gender analysis of social policy in Latin America has led to a number of generalizations that need qualifying in the light of the region's history of public provision: for instance, Kabeer (1997:1) stated that prior to gender analysis the poor were "seen as composed entirely of men or else women's needs and interests were assumed to be identical to, and hence subsumable under, those of male household heads". This was only partly true of Latin America where, as we have seen, women as mothers, single or not, were granted special entitlements and poverty relief from the beginning of the twentieth century.

the workforce, by broad consensus their primary duties lay within the family. Liberal citizenship might extend to women in the public realm, but in the private domain, a different order prevailed.<sup>14</sup> Where women's needs were specifically acknowledged, entitlements were gained principally by virtue of their place within the family as wives and mothers whose main legally enforceable responsibility was the care of husbands and children. In Mexico, for instance, it was not until 1973 that this legal norm was removed from the civil code (Varley 2000). It is interesting to note that while widows sometimes received pensions, most working women did not, or received small ones, their paid work being considered supplementary, or even detrimental, to family well-being.

Welfare provision for women was above all based on *maternalist* assumptions, that is, entitlements were accessed by virtue of being a mother, assumed as a present or future destiny of all women (Molyneux 2000a). This has been an enduring feature, as we shall see, of poverty relief in Latin America. Mothers were indeed among the first to be recognized as social policy claimants whether as married women or as "unfortunates", that is, single mothers. However, it was made clear in the quasi-legal policy rhetoric that it was primarily in the interest of their children that women might receive benefits of a financial, educational or medical kind. Motherhood increasingly became the object of state regulation, partly through the efforts and demands of women's movements, partly through eugenicist "social hygiene" policies aimed at modernizing childrearing practices (Stepan 1991). Alongside or within socialist parties women pressed for the regulation of their working hours, in order to protect them from overexploitation and to safeguard their "maternal functions". As early as 1906, bills were proposed in Uruguay to give rights to maternity leave, and legislation to restrict women's working hours was first introduced in Argentina in 1905. Paternalist sentiments were aroused by such claims, and women were grouped, along with children, as those who required protection rather than the full rights of citizenship. Most Latin American countries followed Uruguay's lead and passed laws to reduce women's working hours, sometimes arguing that such a reduction was necessary to safeguard their reproductive capacities and at other times that it was their moral virtue that was at risk in the workplace.<sup>15</sup>

Women were active participants in the emergent structures and practices of public welfare and social reform. They had long participated in the administration and dispensation of charitable activities, an involvement regarded as a natural extension of their family roles and deemed suitable for their "special attributes" and concerns—including by the Catholic Church, which otherwise opposed women working outside the home.<sup>16</sup> In the 1920s, the entry of science and rationality in the service of public welfare opened up this fertile field for female activism. Women in paid and voluntary capacities mobilized around the social hygiene and eugenics movements, which promoted ideas of social modernity as a *sine qua non* of economic development. Feminist campaigners eager to bring the family under the reformers' gaze joined in the assault on archaic family practices, seen as founded on ignorance and as leading to degeneracy and debilitation of the race. Increasingly, women participated in the work of "social hygiene" in large numbers: they assisted as volunteers and professionals in programmes concerned with child and maternal health, and poverty alleviation and in campaigns to restore the family to the centre of a stable national community. The class divide in this work was evident, with professional and elite women engaged in efforts to redeem from "degradation" the families of the poor and particularly the women within them. This growing involvement was accompanied in the countries of the Southern Cone, and in Mexico, by the creation of professional bodies dedicated to social work, with the absorption of thousands of women into

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<sup>14</sup> On the early mid-twentieth century history of women's rights in Latin America see, inter alia, Lavrin (1996); Dore and Molyneux (2000); Hahner (1990); Besse (1996); Stoner (1988); and Miller (1991).

<sup>15</sup> This section is drawn from Molyneux (2000a).

<sup>16</sup> Maternalist philanthropy was present in the form of charitable organizations founded and largely run by middle- and upper-class Catholic women; known commonly as *Sociedades de Beneficiencia*, these were active in many countries by the turn of the twentieth century. On this form of maternalist philanthropy in Latin America see, for example, Schell (1999). In Molyneux (2000a), I discuss the implications for women's citizenship in Latin America of the double normativity ascribed to citizenship status of womanhood that accords the female sex formal equality in the public sphere but allows masculine right to prevail in the domestic.

their ranks. Overall, women's work and their lobbying in this area were important in the development of welfare provision and social legislation much in the same way as occurred in other countries at the time.<sup>17</sup>

In the 1930s, motherhood came under scrutiny as an object of knowledge and a target of intervention with numerous legal measures adopted including Childrens' Codes and Maternity and Family Acts. As "maternal eugenics"<sup>18</sup> gained in support, efforts intensified to have women's reproductive functions protected in law and their childrearing methods improved. In the Southern Cone, a growing concern with demography, a product of declining birth rates and the end of the large immigration flows to Latin America, brought motherhood into alignment with discourses of national duty. If motherhood had been seen in early bids for suffrage as the female equivalent to military service for men, in the 1930s a similar argument was deployed by state legislators anxious about demographic trends. Women were increasingly urged to be mindful of their national duty to provide the future generation as maternity and fertility became crucial resources for the nation justifying further state regulation of women's bodies. So it was in Argentina in 1934 that women workers acquired rights to maternity leave (75 days in *toto*), maternity pay and free midwifery. In 1937, mother and childcare protection centres were established. In some cases, women became the objects of authoritarian and patriarchal forms of state intervention; in Chile and Mexico abandoning the home became a particular female crime, and in 1931 the Chilean government approved a Sanitary Code, which protected mothers' milk from commercialization, and ruled against wet nursing, stipulating that mothers were obliged to nurse for five months after the birth of a baby. Mothers, actual and potential, were also to be protected from sexually transmitted disease. A short-lived enthusiasm for prenuptial certificates to detect disease before marriage was an issue on which feminists and congressmen coincided (Lavrin 1996). Here, it was men's sexuality and prerogatives that were the focus of bureaucratic interest and regulation; many women supported these initiatives as necessary to secure protection from disease resulting from men's philandering, double standards and sexual mores. In this sense, for all that liberal states sought to secure their nation's passage into the modern world, they wished to do so while retaining a firm grip on the family and on women, none firmer than that conferred by the patriarchal status quo. Legal reforms and entitlements for women were passed, but ones that did not tinker too radically with the system of patriarchal right.

These claims over women's bodies made on behalf of modernizing and strengthening the nation were asserted in a context where first wave liberal and socialist women's movements were losing their impetus, and were being overtaken by a new dynamic and a new constellation of state forms associated with the rise of populist corporatism. Latin American corporatism, even in its weaker and less ideological forms, was premised on gendered assumptions. Corporatist bargaining established a political bond between the worker and the party ensuring the loyalty of the more effective sectors of organized labour. Male-dominated trade unions were the principal beneficiaries of corporatist social contracts that enrolled men in the service of the state as workers and patriots, their compliance secured through negotiated pacts over wages, working conditions and social security (Roseblatt 2000). While women were acquiring a greater presence in the workforce, they laboured in poorly paid, less organized sectors. Not only were they marginal to the contractual negotiations of the corporatist state, but they also occupied an ambiguous place in populist rhetoric. While state propaganda celebrated the *hombria* (manliness) of the nation's workers, the very fact that women worked at all was regarded by many congressmen in the 1940s as a symptom of the nation's backwardness, rather than as a sign of progress, as socialists had long proclaimed. In Argentina at this time, the working woman was regarded as an unfortunate, to be pitied and protected by the state and by their husbands. Optimally, they should be able to withdraw from the workforce altogether, a move that would be enabled by the restitution of a family wage. This historic demand of organized labour was one premised on female dependency and the presence in the family of the full-time housewife and mother. Yet, in Chile, the state, trades unions and oppositional parties

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<sup>17</sup> See Skocpol's (1992) study of the contribution of women to US social protection.

<sup>18</sup> This is Stepan's (1991) term.

also shared a concern to discipline and domesticate men. In being elevated to his “appropriate” place of authority, the *pater familias* was required to discharge that authority with responsibility and self-discipline. The sober, hardworking father was the natural complement to the dependent housewife-mother. The worker’s family was now an object of concern, to be regulated not only through the external agencies of the state (social workers, social hygienists and the like), but also through new norms of appropriate conduct. Performance at work and conduct at home unified the public and private worlds as sites of intervention (Roseblatt 2000).

Corporatist bargaining did, however, secure the passage of numerous welfare measures, many of which had been promoted by eugenicists and other reformers in previous decades but had not been approved or, if approved, had lain dormant on the statute books. Drawing on earlier arguments for social inclusion and class harmony, populist governments sought to establish a more extensive system of welfare, albeit one that was only selectively inclusive and reproduced the clientelistic structure of corporatist favouritism. Yet, while the client-citizens of the new states, both male and female, enjoyed an expansion of their social rights, these redistributive measures had a paternalist character because they assumed the interests of male wage earners as principal beneficiaries; women qualified for benefits chiefly as the dependants of men. The apparent exception was the unmarried mother, whose cause some populist states made their own. Lone mothers became a symbol of the compassionate and paternal nature of populist regimes that arranged for the state to replace the husband in providing dignity and sustenance. Largely an urban system of welfare, rural and indigenous women were often excluded from these and other entitlements and were more often than not denied rights to property in land, which through law or custom remained a male prerogative thus revealing the bias as well as the limits of populist policies.

Women later gained other entitlements as workers, sometimes as a result of populist vote garnering as in Argentina’s Peronist government, or as a result of International Labour Organization conventions, but these, too, were usually premised on maternalist assumptions. In any event, entitlements for women of whatever kind were restricted to a small section of the female population, and were often merely formal, being unclaimable in practice.<sup>19</sup> What little social protection was available to women was more likely to be accessed through marriage and family law, which specified that it was a husband’s duty to provide for his wife and children, and in some countries afforded women conjugal property rights (Deere and León 2001).

While there occurred some limited individuation of women’s rights from the family as a result of reforms spearheaded by feminist movements, these general features of women’s social rights endured. The restricted reach and scope of social policy, the poor quality and difficulty of accessing many of the services and benefits meant that most low-income women could not and did not look to the state for much in the way of support. They might be fortunate enough to attain some minimum provision in education and health, but benefits such as income support and pensions were distant dreams for the majority. Security, such as it was, came from paid work where it could be found, from marriage, kin and community, and from the church.

### **Social sector reform**

The fragility and/or inefficiency of the social security systems prevailing across much of Latin America were features that were sharply accentuated by the broader socioeconomic trends that set in from the mid-1970s. The oil shocks, the debt crisis and subsequent recession of the 1980s combined with demographic pressures—and in much of the region with political conflict—to erode the social sector at precisely the moment when its expansion was most needed.<sup>20</sup> Heavily indebted Latin American states came under pressure from international financial institutions (IFIs) through “policy-based lending” to restructure, and to adopt measures aimed at curbing inflation,

<sup>19</sup> Barriers to claimsmaking included administrative obstruction, low female educational attainment and ignorance of rights and, for indigenous women, the lack of an identity card would be sufficient to bar them from their entitlements.

<sup>20</sup> As a percentage of total spending, social spending fell in all countries between 1980 and 1989 (ECLAC 2000, 2002).

decreasing fiscal deficits, liberalizing the economy and privatizing state enterprises. Governments were weakly placed to resist the reforms, even if they wished to (which many did not), and as half of the countries in the region were under military dictatorships, previously held assumptions about the scope of state redistribution and intervention were rapidly abandoned in the absence of opposition from a suffering and all too often harshly repressed population.

During the “lost decade” of the 1980s, the majority of Latin Americans suffered from serious policy failure. With some exceptions, stabilization measures were all too often introduced with scant regard for those adversely affected. As wages plunged, unemployment soared and poverty deepened, social sector funding shrank or remained constant but insufficient to meet escalating needs. Safety nets were, with few exceptions, inadequate and were developed late in the process. Households drastically cut consumption, substituting market purchased goods and services with reproductive labour, largely provided by women who now entered the labour force in rising numbers (González de la Rocha 1994). Where emergency relief programmes were put in place coverage was poor, given the extent of poverty and deprivation (Graham 1992). If the crisis resulted in the abandonment of the remains of the CEPALISTA economic model, the same was true of the “nominally universal” principles that from the 1960s were held to inform welfare.

In other words, social policy was required to adapt to economic policy, and the long-running debate over the need for social sector reform in Latin America acquired a new momentum. One point on which there was broad agreement was that if the social sector was to be more efficient, it had to be brought into closer alignment with the market and with broader trends toward pluralizing service delivery.

Debates over social sector reform took place both within the region and in international development policy arenas, stimulated by the growing international concern and regional protests over the social costs of adjustment. Research revealed the scale and depth of poverty, confirming what had been signalled long before, and played an influential role in the policy prescriptions that emerged. Cornia et al.’s (1987) “adjustment with a human face” is widely acknowledged as a “wake-up call” to international agencies to pay attention to the social costs of adjustment, but it was also important for the policy recommendations that it made. While seen as presaging future policies, these recommendations confirmed trends that were already under way such as more targeting as a means to enhance the redistributive role of the state; employment-creating, labour-intensive public work schemes; subsidies of certain items; and, crucially, for the scope of social policy to be widened during times of adjustment. These ideas were already achieving wide acceptance in development institutions, but would take time, political will and resources to implement. Poverty was beginning to be seen not as a “transitional phenomenon” as initially supposed by the World Bank and others, but was acknowledged to be a structural effect of the New Economic Model, requiring closer attention to social assistance, primarily in the form of antipoverty measures and state programmes. These ideas became central to the NSP as it was being forged, and by the end of the 1980s many governments and international development agencies accepted that there was an urgent need to address the “social deficit” if the neoliberal reforms were not to be violently rejected by the populations that had suffered so harshly from them.

### ***Neoliberalism and the NSP***

The term “neoliberal” is widely used as a shorthand to describe the policy shifts that have taken place in recent decades, but it is too broad a descriptor for a much more sequenced and fragmented process than is often implied. There is also a need of some refinement to capture the different “moments” in policy evolution since the mid-1970s and its variant regional modalities. The consequences of the end of Keynesian economic and social policy and the return to market liberalism were international in reach and scope in that they were accompanied by reforms of welfare regimes across the world; but each region and indeed each country responded in

accordance with its own specificity, social, economic and political, with variations in the depth and timing and political momentum of the reforms.<sup>21</sup>

The central features of the NSP conform to the general descriptions of neoliberal policy assumptions, containing as they do the familiar elements of targeting, privatization and pluralization of service providers, along with a greater reliance on the market for poverty relief most evidently in microcredit programmes and the partial privatization of pensions. In Latin America, neoliberalism passed through two main phases. The first, from the 1970s, generally seen as the period of “high neoliberalism”, coincided with the policies of structural adjustment and stabilization adopted in the debt crisis. These policies dubbed “market fundamentalism” and adopted by governments often under conditionalities imposed by the IFIs, aimed to decrease the realm of state action, imposing tight fiscal controls, liberalizing capital accounts, privatizing state economic assets and opening up their economies.

Since then, there has been some revision of these policies, with results summed up as “the post-Washington consensus”, variously hailed as “the end of neoliberalism” or as “neoliberalism with a human face”. Significant though these policy shifts might be, they did not greatly alter the broader outline of macroeconomic policy; the new democracies remained committed to fiscal discipline and market-led growth. However, the original adjustment package was modified in three ways that concern us here: (i) the state was partially rehabilitated in development policy and planning, its role described as “facilitator” by the World Bank and its efficiency to be enhanced through good governance reforms; (ii) there was a clear recognition by the IFIs and by Latin American governments that the social deficit had to be addressed, so social policy was returned to the regional agenda; and (iii) poverty relief became a central component of social policy. If in the 1980s policy attention focused on “getting the economy right”, in the 1990s there were attempts to attend to the hitherto neglected social realm and to build appropriate institutions.<sup>22</sup>

With dogmatic orthodox economics in the international development institutions now widely criticized amid resignations of senior economists from the World Bank and the International Monetary Fund (IMF), there was some greater receptivity to voices that came from outside the mainstream—among them social scientists, NGOs, the UN community, and heterodox and social economists. The preparations for the Beijing, Cairo and Copenhagen end-of-millennium conferences<sup>23</sup> helped by making welfare and social policy central themes in political debates, while the United Nations Development Programme’s (UNDP) efforts to broaden the definition of poverty moved the emphasis away from income poverty to embrace social aspects of well-being and human development. For its part, the World Bank began to explore how to develop fresh approaches to steer its work, some of which eventuated in new research initiatives such as those on Social Capital and the Voices of the Poor. All of these were tributary currents in the formation of the NSP and corresponded to a new phase of what could be termed “reactive” neoliberalism.<sup>24</sup>

As Brock et al. (2001) argued, the evolution of development policy is not usefully seen as following a unilinear dynamic; the social policies and development rhetorics that accompanied the postadjustment phase are better described as “hybridized”, and seen as the result of a complex dynamic of power and agency, involving a wider range of actors, interest groups and discourse coalitions than top-down accounts usually allow. The same is true of social policy,

<sup>21</sup> This debate is well developed in relation to the industrialized West with positions ranging from Barnett’s (2005:9) argument that “there is no such thing as neo-liberalism” to the extensive governmentality literature that situated neoliberalism, following Foucault, as a rationality of government with a repertoire of technologies of rule. See, for example, Larner (2000) and Dean (1999).

<sup>22</sup> This turn toward the social realm is interesting when seen in the context of the technical composition of the World Bank’s personnel: social development expertise in 1993 was confined to six professionals, but rising to 107 in 1997 and around 200 by 2002. A further 250 World Bank staff have higher degrees in non-economic social sciences (Hall 2005).

<sup>23</sup> The Fourth World Conference on Women, Beijing, 4–15 September 1995; United Nations International Conference on Population and Development, Cairo, 3–13 September 1994; and World Summit for Social Development, Copenhagen, 6–12 March 1995.

<sup>24</sup> This is an adaptation of Ticknell and Peck’s (2003) suggestive term “proactive neo-liberalism”. The pity was that debate over economic development receded into the background instead of forming part of the general re-evaluation process.

which is less subject to influence by the IFIs than some other areas of policy, as it has to be approved by parliaments as well as by interest groups such as trade unions. The evolution of the NSP in Latin America aptly illustrates this diversity in social policy thinking and provision.

### ***The NSP materializes: Reactive neoliberalism?***

By the early 1990s, development institutions were promoting reforms and policies affecting the social sector, some of which had first been applied experimentally from the 1970s, some of which were new. In the latter category were more decentralized health and education provision, the privatization of pensions, and in the former, a greater emphasis on participatory mechanisms in the delivery of social welfare. All were intended to increase efficiency, accountability and quality (Grindle 2000). Of particular interest for our purposes here was the emphasis given to poverty and to the development of new approaches to poverty relief. As poverty moved up the scale of international priorities, 1990 saw the launch of the World Bank's New Poverty Agenda, an indication that the IFIs belatedly took their share of the blame for the disastrous toll of the stabilization packages. Western governments and international development institutions came under pressure to make poverty a more integral and explicit part of their project design as well as the basis for bilateral and multilateral aid formulas. Poverty relief increasingly became a central part of development policy with a new repertoire of technologies for its management, of which Poverty Reduction Strategy Papers (PRSPs) and participatory poverty assessments came to occupy a central place. The use of social conditionalities applied, in particular, to the heavily indebted poor countries through Poverty Reduction Strategies was one of a range of mechanisms adopted for "mainstreaming" poverty in development programmes. Poverty, thus, came to occupy a principal place within global and regional priorities, culminating in the United Nations Millennium Development Goals commitment to halving extreme poverty and hunger between 1990 and 2015.

Development policy analysts acknowledge these shifts to be a significant departure from the structural adjustment objectives pursued during the 1980s. Lipton and Maxwell (1992:1), for instance, identified six new elements in poverty relief strategies: (i) changed expectations of the role of the state; (ii) the importance of civil society; (iii) a focus on labour-intensive growth; (iv) new interest in social security and targeted welfare safety nets; (v) recognition of the importance of external factors; and (vi) new environmental considerations. These ideas were incorporated into policies and programmes selectively and with variations across and within regions—as we shall see later in regard to Latin America. But there were also other concepts that were central to the New Poverty Agenda, three of which were particularly important and in some ways novel, at least in their combination. These were the principles of: participation, empowerment and co-responsibility.

Participation is hardly a new idea, but it has moved from the margins of development practice in the 1970s to form part of mainstream thinking in the 1990s. It is clearly open to many different understandings and is associated with a range of diverse practices, administrative technologies and politics. In general terms, it combines an ethical (democratic) principle with efficiency arguments, and is considered to be superior in both respects to bureaucratic centralism, which is neither democratic nor efficient. The efficiency argument links ideas of sustainability (people invest more in making their "own" projects work) with ideas of efficiency (local knowledges are essential if projects are to work). Participation also serves to provide development projects with some measure of legitimacy on the assumption that those involved have helped to shape the direction and outcome. Such people-centred development has not surprisingly been welcomed by NGOs, many of which had been pressing for decades for greater attention to the grassroots in the formulation of policy. These ideas have also inspired the model of demand-led assistance, first introduced experimentally in the emergency social funds, which were later renamed social investment funds and established in a broader range of countries. Decentralization, too, has proceeded in tandem with novel forms of citizen participation in decision making. From a broader societal perspective, participation is argued to tackle the condition of social exclusion that frequently attends poverty and deprivation and is

seen as central to, if not synonymous with, the creation and maintenance of social capital, itself a policy concern of the 1990s.

Empowerment like participation with which it is linked (since participation is one of the means to secure empowerment), moved into mainstream development practice in the 1980s, identified by the World Bank (2001a) in its *World Development Report (WDR) 2000/2001: Attacking Poverty* as an important development objective. Widely used in the practice of women's organizations and by NGOs, it has generally been understood as a process of transformation involving both the acquisition of capabilities and changes in subjectivity that enable agency to be exercised.<sup>25</sup> Empowering the poor and the disadvantaged should result in their gaining more voice and presence in decision-making arenas that affect their lives and in developing the capabilities to enable them to escape poverty. Support for such "empowerment approaches" builds on the critique of traditional philanthropy that lived on in "assistentialist" policies that saw "beneficiaries" as passive recipients of charity. The new policies instead situate "users" as "stakeholders", with interests and responsibilities, who are "participants in the policy process". They are no longer "beneficiaries" or "clients of the state", but empowered active citizens capable of formulating their own needs and engaging in the setting of priorities and the implementation of projects whether community development schemes, health and housing or microcredit enterprises.<sup>26</sup> As the human development approach has gained wider acceptance in policy circles, empowerment has also come to mean that the poor are to be trained and educated to prepare them for employment.<sup>27</sup> Poverty "relief" is not to be considered a short-term palliative, but is a way of helping the poor to develop the means to secure a route out of poverty through incorporating elements that enhance their capacities and choices. In the *2000/2001 WDR* (World Bank 2001a:1), the conceptual basis of sustainable poverty alleviation is "social risk management", which entails measures to increase the security of the poor through developing their capacity to "cope, mitigate or reduce" their risks. The risk management approach has been adopted by a wide range of multilateral lending institutions.

Third, related to the previous two concepts, is the principle of beneficiary responsibility variously articulated in ideas of "co-management/responsibility" self-help or self-sufficiency, ideas that gained resonance in the 1980s when the state was identified as a major cause of development failure and accused of nurturing a "dependency culture". At the same time, the World Bank, concerned with cost sharing and efficiency, formulated policies in which the no longer passive recipients of state handouts became active participants in meeting the costs of development. The growth of cost recovery, co-financing and co-management schemes along with community participation and voluntary work became a means to promote self-help in development and welfare projects. As states moved toward targeted assistance programmes, attention focused on how the poor could be encouraged to help themselves (Cornwall 2003). This idea informed a range of policies, from giving economic assistance (as in the case of microcredit) to providing basic education in nutrition and health care. The latter were designed, as in the earlier social hygiene movements of the 1920s and 1930s, to modernize and civilize the poor, but also to equip them with the attitudinal wherewithal to manage their own destinies, free of state dependency but subordinated to the discipline of the market.

These developments, implying both state reform and a marked redefinition of state-society relations have generated considerable theoretical interest and debate. Some scholars see the potential for creating a more democratic society along with a more efficient and accountable policy administration in a shift from relations previously characterized by authoritarianism, clientelism and paternalism to ones based on active citizens involvement (Fox 1996; Jelin and

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<sup>25</sup> See Parpart et al. (2002) for a fuller discussion of the idea of empowerment from a gender perspective, and Molyneux and Lazar (2003) and Townsend et al. (2000) for feminist applications to women's grassroots organizations in Latin America.

<sup>26</sup> These ideas permeate development agency literature whether governmental, third sector or international development institutions. For good examples, see the *Voices of the Poor* by Narayan et al. (2000), its Mexican partner study by Szekely (2003) and the *Empowerment Sourcebook* published on the World Bank Web site at [www.worldbank.org](http://www.worldbank.org).

<sup>27</sup> See UNDP (1995) for policy implications of this conceptualization, and for theoretical discussion of capabilities see, for example, Nussbaum (2002).

Hershberg 1996). Others see instead a thinning out of policy commitment, a decline in social rights, masked by the language of participation and social capital, in which development programmes embodying these principles serve more as a means of regulating the poor and mobilizing cheap or free labour than tackling poverty or securing development objectives (Schild 2002). What light does a focus on Latin America cast on this debate? This question is addressed below by considering what the consequences are for low-income women of these broader shifts in policy.

### ***Latin America and the NSP***

In Latin America, the novel features in this post-Washington consensus phase of policy evolution lay in the specific regional interpretation of its key elements. This was most evident in three areas: (i) the changes in the locus and character of state activities; (ii) the rise of parallel institutions to assist in the delivery of social welfare; and (iii) the promotion of civil society partnership in development and poverty relief programmes. How these elements, combined with efforts to create democratic politics in postauthoritarian Latin America and resonated with historic demands for reform, are essential elements in understanding the ways in which social policy was refashioned in the changed circumstances of the 1990s.

The ideas associated with the NSP began to be applied more widely in the region after the “lost decade” of the 1980s. Latin American versions of the NSP combined some approaches pioneered in the region with World Bank and UN policies and programmes. Indeed, many of the ideas that seem novel in the NSP had made an appearance in Latin American development practice decades before. This was the case with respect to participatory and community development projects in the areas of health, housing and popular education as well as to the social sector reforms pioneered in Chile under the Augusto Pinochet dictatorship (1973–1989). What was different was that now the international financial and development institutions gave these ideas their *imprimatur* and placed funding behind them. The emergent social policy initiatives did not, however, produce any uniformity in systems of provision. This is not only because “actually existing” neoliberalism is, it seems everywhere, applied pragmatically, but also because as it has evolved, it has absorbed a diversity of ideological viewpoints combining elements of “thick” and “thin” liberalism, where ideas of market deregulation co-exist with community participation and empowerment in the policy field (Larner 2000).<sup>28</sup> Those who see neoliberalism as having “programmatically coherence” forget that the terrain of policy, whether social or economic, is always contested, and is shaped by different, sometimes competing, politics and discursive fields as well as by existing institutional structures, governing parties and patterns of provision.

The Latin American experience of postadjustment policy making has, therefore, been marked by an ad hoc accommodation to the precepts of the New Economic Model, combining new and old policy elements, the latter illustrating a certain path dependency in social policy thinking and provision, while at the same time generating some original trends and initiatives that have entered the global debate on poverty relief. In practice, policies range along a spectrum from social liberal variants with universalist inclusionary principles (Brazil) to those based on targeted provision with a greater role for privatized services (Chile, Peru). In all of these variants, the Latin American region has seen the establishment of a wide range of new agencies and institutional structures for providing access to social services. Government-sponsored poverty programmes have been established to complement the continuing work of social investment funds, and consultative processes and institutions have been put in place at local and national levels. In Latin America as elsewhere, the official policy discourses and forms of entitlement that are being created tend to place more emphasis on individual responsibility, while social security is defined in official statements as no longer residing solely with the state. It now involves the “co-management of risk”, that is, the individual has to make responsible provision against risks (through education and employment), the family too must play its part

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<sup>28</sup> As the governmentality literature suggests, neoliberalism is not simply a top-down policy agenda but a transformation in the modalities of rule. See Lind (2002) for a gender analysis of policies in Bolivia and Ecuador.

(through better care), while the market (through private interests) and the community (through devolution “co-responsibility” and the voluntary sector) are all involved in the decentring of expectations of welfare from the state.<sup>29</sup>

The specificity of the Latin American region not only stamped its mark on how these ideas would materialize in policy, but also how they would be received by citizens. In a context of widespread distrust of the state and weak and segmented social protection, the refiguring of state-society relations offered by the NSP received a mixed response, not by any means all negative. The core ideas at least seemed to offer some potential for advancing much-needed reforms, if social and political conditions allowed. Decentralization, “good governance”,<sup>30</sup> accountability, participation and urgent attention to poverty resonated with the reform agendas of democratic parties, movements and civil society organizations that were working to democratize politics and society following years of military rule.<sup>31</sup> From the 1980s, calls to “deepen” democracy and to address the “social deficit” of the adjustment years converged with good governance and state reform agendas. The human rights movement in the 1990s was enjoying a particularly prominent international role, and this impacted in Latin America at a time of considerable receptivity to the new inclusions of women’s and children’s rights and indigenous claims for recognition and justice. The turn to “rights-based development” in the 1980s probably received more support and attention in Latin America than in any other region in the developing world (Molyneux and Lazar 2003). Women’s movements of various kinds were particularly active in promoting women’s rights, working simultaneously within communities and at the state level to advance reforms in the areas of violence against women, legal and political representation and reproductive rights (Alvarez 1990). They also helped to establish and sustain popular health movements, leadership and legal literacy training for women throughout the 1980s and 1990s.<sup>32</sup>

In much of Latin America, the political momentum of democratization in the 1980s provided discourses of participation and civic activism with a broad popular legitimacy. Newly elected governments had a democratic mandate for reform and enjoyed a relatively high degree of trust. The new constitutions that accompanied efforts to reform the state after military rule recognized the “democratic deficit” in the governance system and incorporated commitments to broaden participation in political and policy arenas. The state was here figured as an object of democratic reform, with civil society mobilized to demand the “right to be heard”, and to engage in the policy process. Greater citizen participation in development projects and in governance at the local level was welcomed across the social spectrum as a counter to the corrosive social effects of the restructuring process, which had left Latin America with growing crime rates and widespread anxieties about social fragmentation and anomie. The language of participation, the decentralization of decision making to the local level and the emphasis on self-management was welcomed as a gain of democratization that offered citizens some potential to secure greater responsiveness to social justice demands and accountability from their rulers.

This civic momentum was also influential in deliberations over social policy where it resulted in some innovative proposals. Against those who saw a welfare state of the Western European variety as a possible and desirable goal for Latin America were proponents of a people-centred co-management model that offered the promise of making social welfare policy a more democratically managed, downwardly accountable, and efficient process. Here were combined a pragmatic realization of the limited scope of state action in the face of its inherent limitations and the growing demands upon it, and an enthusiasm for improved service provision that would respond more directly to the expressed needs of communities. This approach, in practice, combined some elements of universalism with targeted provision for those suffering particular deprivations in health, education and income. Brazil, for example, introduced non-contributory, non-means-tested pension schemes for rural workers (Previdência Rural), which is not just paid to

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<sup>29</sup> See SEDESOL (2003) and its Web site postings for examples of this conceptualization.

<sup>30</sup> See Weiss (2000) for a history of the contemporary usage of good governance in development policy.

<sup>31</sup> See Jelin and Hershberg (1996) for further discussion.

<sup>32</sup> See Jaquette (1989), Jelin (1990) and Craske and Molyneux (2002) for case studies of women’s movement activism during this period.

heads of households and to those in formal employment but also to subsistence farmers, women and informal workers. Indeed, the Brazilian Constitution of 1988 was the first to combine proposals for an alliance between state and civil society, with a commitment to universal social polices and raising total public expenditure, along with proposals for new institutional structures, such as management councils and public hearings, where state and civil society could “work together to ensure that priority setting matched the public and private interests and secured accountability in the definition and delivery of social policies” (Coelho et al. 2002:20). Variant forms of these “co-management” structures can be found across the Latin American region, among the most successful being the popular health or “sanitary” movements that have worked at the community level to improve health care delivery.

The trend toward involving NGOs in service delivery for all its acknowledged limitations was also seen in more positive terms, at least initially.<sup>33</sup> In many countries, the expansion of the third sector represented not so much a “devolution” of responsibility from the state as a plugging of some of the many gaps in existing provision. Moreover, despite new administrations’ promises of reform, the state sector soon disappointed raised expectations with continuing habits of clientelism and corruption. NGOs *par contra* were, on the whole, trusted, in large part because in much of Latin America democratic social movements worked with, or evolved into, NGOs that were committed to democracy, human development, citizenship and participation. In the conditions of postauthoritarian redemocratization that accompanied neoliberal reform in Latin America, the incorporation of ideas of citizenship and participation into social policy was a natural outgrowth of democracy movements. In other words, these concepts became “part of the common sense”. They were invoked as much by politicians as by NGOs and the World Bank as a way of mobilizing public efforts to tackle poverty and a range of social and political problems to establish a more widely shared sense of social responsibility and a firmer basis for political legitimacy. In this process, NGOs were seen as ways to bridge the gulf that separated the shrinking social services offered by the state and the needs of civil society. Indeed, the third sector underwent the transformation described by Korten (1987) from charitable agencies to being social change agents that helped civil society to express its demands. In this process, they served as brokers that were usually service oriented, supplementing the state’s delivery system and providing underserved populations with the required goods and services. Throughout the 1980s, NGOs were active in the area of what might be called “grassroots social policy” and instrumental in promoting ideas of self-determination within local popular movements, offering assistance to historically marginalized groups, while at the same time collaborating with government for improvements in delivery of services (González Bombal and Villar 2003). They played a particularly important role in the administration of emergency social funds; 81 per cent of the institutions working with the Bolivian Emergency Social Fund were NGOs (Graham 1992). NGOs were in many ways the institutional manifestation of these popular movements for local “self-help” (Molyneux and Lazar 2003). According to Cardelle’s analysis,

NGOs in Latin America were highly effective in delivering social services to the poor...the sector gained a reputation for providing reliable alternatives for the disbursement of international aid in places where donors had lost confidence in the public sector (1997:3).

Beyond their practical contribution, NGOs were important in helping to frame demands for citizenship and inclusion, working both with and, at times, against the state to advance reforms. The new antipoverty programmes were, therefore, shaped by a variety of different imperatives within which the political momentum of democratization played a part. This was, however, limited by the inability of governments to meet popular expectations of higher growth and greater economic security, and in the course of the 1990s, the momentum of “redemocratization” slowed.

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<sup>33</sup> Among the many criticisms of the policy reliance on NGOs are the fragmentation of responsibility for welfare and the lack of fit between macropolicy and micropolicy. This has finally been acknowledged in international development policy arenas with the emphasis now being placed on state capacity strengthening in the area of service delivery. See Townsend et al. (2002) for a critical discussion of the role of NGOs.

### ***The state and the NSP***

Where was the state in this scenario? Analyses of neoliberal restructuring have documented the scaling down of entitlements and of governments' commitments to universal provision, showing the trend toward a greater reliance on the private and third sectors for welfare delivery. These trends have been seen as evidence of the shrinking of the state, its "hollowing out", "evacuation" even "disappearance" as a necessary effect of economic policy. Does this accurately describe what has occurred in Latin America?

The data suggest a more complex picture, a less "zero sum" situation. There has undoubtedly occurred a decisive shift from the state-centric principles that previously governed social and economic policy, but this has not gone along with the "retreat of the state" from social provision. This widely held view of post-1980 reforms does not allow us to capture what is different about current social policy figurations of the state, or the substantial changes that the state itself has undergone during the decades of "neoliberal hegemony".

This qualification applies as much to the more developed welfare regimes in the industrialized world as it does to Latin America. If, in Western Europe (and to some degree also in some of the communist states), the structure of provision designed to secure social welfare has been significantly eroded in recent decades, it has not disappeared entirely. As Hirst and Thompson (2000) argued, welfare states have persisted in the socially solidaristic countries of Northern and Western Europe, and also in countries like Australia and Canada. In Denmark, the Netherlands and Sweden in the period under review, a high degree of economic internationalization co-existed with extensive welfare benefit and public services, and growth in output and employment.<sup>34</sup> Universal entitlements to health and education, along with forms of social security such as basic pensions, and benefits for those unable to provide for themselves through the principle form of social security, employment, continue to be supported and achieve a high degree of consensus, at least for the moment. Social reproduction in the domains of health and educational provision remains by and large the responsibility of the state across a range of countries, despite decades of creeping marketization and a widespread sense that state provision is underfunded and is becoming more inefficient and inadequate.

The Latin American state, always weaker in many important respects, and undergoing restructuring through the devolution of some responsibility to other agencies, is nonetheless far from absent from the domain of social policy. State shrinkage has generally been greatest in the countries with weak entitlement systems and least in those with more expanded welfare provision (Filgueira and Filgueira 2002). Moreover, by the mid-1990s, some analysts argue, the elements of a new "social state" were being assembled in some Latin American countries (Filgueira, 2005; Serrano 2005). After the critical watershed years of the debt crisis when social expenditure per capita fell to unprecedented levels,<sup>35</sup> by 1991 it recovered the levels registered at the beginning of the 1980s. This was the case even in those countries that enthusiastically adopted neoliberal economic policies. In this group, which includes Argentina and Chile, social expenditure remained at previous levels and in some cases rose (ECLAC 2002).<sup>36</sup> For the Latin American and Caribbean region, resources channelled to social investment rose 3.5 points in the 1990s. On average, based on 17 Latin American countries, public social spending in the 1990s rose from \$350 to \$550 per capita (ECLAC 2000:1). However, these figures must be treated with caution. One study of the 1990s shows that the rise in public social expenditure was insufficient and inadequately targeted, thus failing to reverse the effects of the crisis years.<sup>37</sup> Other problems concern the ways that social expenditure is calculated; Mexico has doubled its social spending over the last two decades from 30.4 per cent in 1981 to 61.5 per cent of the budget. But the

<sup>34</sup> See Hirst and Thompson (2000), chapter 6, for a fuller discussion.

<sup>35</sup> In real terms, social spending per capita declined by 10 per cent between 1982 and 1986. Even as it grew afterwards, it remained 6 per cent below 1980 levels at the end of that decade, and only recovered slowly in the 1990s (IDB 1996).

<sup>36</sup> This is not to say that these levels are adequate or to deny that social expenditure priorities have shifted. The point is merely that some commentators greatly exaggerate the degree to which there has occurred a "hollowing out" of the state; state scope and capacity were already restricted prior to the imposition of structural adjustment programmes (SAPs).

<sup>37</sup> Mostajo (2000), quoted in Barrientos (2004).

budget as a proportion of gross domestic product (GDP) has shrunk by almost half, chiefly because the government in selling of state enterprises reduced its role in the economy. The public sector, however, is still the largest provider of health care services in over 60 per cent of countries, as is the case with education. Social insurance systems (covering the labour force in a handful of the industries in the formal sector) are the second largest source of health care services, covering around 15–20 per cent of the population. What continues to be worrying, however, is that this expenditure is not necessarily reaching those who are most in need, and a significant proportion may be going into management and administration. Nonetheless, the state is still the main provider and in some areas, such as education, the tendency has been less for a relinquishing of control than for the assertion of more centralized administrative powers than before, even as some limited privatization has occurred.

Of particular significance in discussions of the state's role in welfare in Latin America are the efforts that have been made by the international development institutions to advance "good governance" agendas designed to make state institutions more efficient and accountable. This has gone along with support for decentralization and deconcentration, with Latin America taking the lead in the 1990s as the region that had advanced furthest down this path. Redemocratization involved a wave of constitutional reform across the region, and decentralization was one of the democratic principles that was incorporated to redress a historic legacy over centralization. As expressed in the new constitutions, the aim of decentralization is to foster improvements in the administrative performance and quality of services, strengthen fiscal management, enhance private sector development and increase local and regional participation in the decision-making process (Tulchin and Garland 2000). Across the Latin American region from the 1980s, states have been engaged in a process aimed at strengthening and reforming local government, while devolving a greater share of the budget to locally administered state agencies.<sup>38</sup> The previously mentioned Brazilian Constitution (1988), for instance, increased the share of transfer to the municipalities, strengthened their taxing powers and mandated that 10 per cent of the new revenues should be earmarked for health and 25 per cent for education. This process of "municipalization" has brought the state back into the domain of welfare provision, albeit in a new guise. Not only do local governments and municipalities now control a larger portion of state revenue than before, managing and staffing a range of social programmes, but they are also subject to new forms of accountability to the populations they govern and provide for through a range of participatory institutions, again mandated by law. As we will see later, poverty relief has engaged states, both central and local, in a wide range of programmes involving millions of dollars of public and international funding. Most decentralized programmes are a mix of local and central financing, with the latter generally controlling development programmes; international aid is seldom awarded directly to NGOs or to local projects. None of this is to suggest that the decentralization process in Latin America has overcome distributive problems or secured adequate citizen representation. Devolved resources remain sparse, and without plans to tackle regional economic regeneration, decentralization has not generally produced a marked improvement in welfare coverage. Local governance has, however, acquired a new significance and despite the fact that moribund, corrupt and clientelized states abound in the region, states are still central actors in the development and welfare domains. As Tandler (1997:24) showed in the case of Ceará with a population of 40 million in the Brazilian northeast, the state "is doing more" not less "and something quite different as well".<sup>39</sup>

The NSP, therefore, signals a state that is not only still "present", but is also functioning in different ways, with some of its capacities devolved to the local level and exercised in "partnership" with civil society. This latter element of the NSP embodies a less "thin" conception of liberalism than utilitarian versions suggest: the emphasis variously on community, civil society,

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<sup>38</sup> Angell and Graham (1995) argued that decentralization is part of the prevailing market consensus, ensuring greater compatibility with the competitive market model.

<sup>39</sup> What was different was the development of an effective primary care programme in one of the poorest states of Brazil with a population of some 40 million people.

participation and demand-led provision signalled the potential of this new approach, and along with the other trends noted, constitute what is understood as “new” in this policy package. That potential, however, is contingent on a range of factors many of which lie outside the control of local actors such as macroeconomic policy and central government’s commitments to redistributing resources and improving the institutions on which social welfare depends.

Within this rapidly changing public policy environment, women’s movements found themselves able to exert some influence, both at the NGO/grassroots level and within the new democratic spaces that were opening up in social and political life. Having played their part in the redemocratization of their states in the 1980s, women’s movements underwent a dual process of greater dialogue with national governments and of what Alvarez (1999) has termed “NGOization” with activists taking advantage of the new international donor strategy to place their organizations on a sounder institutional basis (see also Craske and Molyneux 2002). Many of these organizations became active in campaigns for improved social services, legal reform and social rights working with allies in parties and governments and with women’s offices or ministries. Campaigns for quota laws and against violence against women were regionalized and transnationalized, and Latin American women’s NGOs were active participants in all three UN end-of-millennium conferences. Transregional networking was not only evident in institutional forums (through ECLAC, the Organization of American States, the Caribbean Community and meetings such as Belém do Pará), but also characterized the practice among civil society organizations providing scope for exchanging experiences and tactics. Women’s NGOs in Latin America were more often than not committed to working with low income, marginalized and disenfranchised women and played an important part in advancing debates over rights and poverty using the language of empowerment and participation to develop a range of personal and organizational capacities and marketable skills. Women’s movements and NGOs were particularly active in the areas of health and poverty relief and had been so since the 1970s; the Public Health Movement (Movimento Sanitário) of Brazil, for instance, was formed by health professionals and academic critics in the mid-1970s aiming to reform the public sector, shift the emphasis from curative to preventative health and make public administration less corrupt and more accountable. To what extent did these ideas emanating both from above and below shape antipoverty programmes in Latin America and with what degree of sensitivity to gender relations? It is to this question that we turn in part 2.

## Part 2: Gender and Poverty

The multiple changes in social provision were bound to have consequences for the large numbers of female poor. There is a substantial body of research on the linkages between gender and poverty in the theoretical and policy literature.<sup>40</sup> The Latin American literature on social policy has included a growing body of research on gender and households as well as on female employment and income generation. Far less, however, is known about how social policy provision per se has interacted with these other variables (employment, family) to affect low-income women or, what concerns us here, how gender is imbricated in the theory and practice of antipoverty programmes.

Programmes specifically directed at the poor have a long history in Latin America going back to the colonial period. Throughout this evolution, those in poverty have been pitied and feared in equal measure, and since the early twentieth century they have been the object of reform processes designed to “rescue” them, rehabilitate them, educate and sanitize them. Poor women have at various times been seen as needing assistance on the grounds that they were sexually vulnerable, their children were at risk, their capacity to work was being squandered through inactivity and/or the family was being undermined through their absence, inattention or

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<sup>40</sup> Poverty data are in general unreliable for assessing the extent of female poverty as well as being overaggregated or, as Johnson-Latham (2003) expressed it, presented in “sex-less” averages; in other words, very few measures exist that track female poverty and gender differences in this area with any accuracy. Thanks to the efforts of ECLAC and some feminist initiatives, Latin America does have some sex-disaggregated data for households that fall below the poverty line.

incapacity. Single mothers and their children were often the site on which converged the combined concerns of philanthropy, feminists and governments, and programmes designed to assist them were devised accordingly. The more recent policies prioritizing female-headed households within targeted poverty relief programmes across Latin America resonate with these early welfare initiatives, not least in drawing on a similar alliance for support.

In recent years, female poverty, as distinct from the gender dimensions of poverty, has acquired considerably more policy attention. If during the period of structural adjustment programmes (SAPs) women were the invisible army who bore the costs of the adjustment to ensure household survival, the New Poverty Agenda appeared to render women more visible. From the later 1980s, women's poverty as well as their *role* in poverty relief programmes became increasingly evident to policy communities. Feminist advocacy and research into the gendered effects of adjustment played their part<sup>41</sup> in securing this visibility: female poverty was a central theme of all the international women's conferences and the Beijing Platform and Programme for Action (PFA) called for it to be addressed as a matter of urgency.<sup>42</sup> The PFA proposed a number of priorities for assistance: the targeting of female-headed households, greater participation of women in decision making at the community and other levels, and the extension of credit to low-income women were among them. The promotion of these ideas was also part of a broader effort by Latin American women's organizations to incorporate a gender analysis into regional declarations and government policies. The NSP, therefore, evolved during the high point of global feminism and yet, as we shall see, its practical realization often meant that it existed in considerable tension with the latter's emphasis on equality.

The scale and momentum of women's movement activism in the 1990s resulted in gender equality being given priority in *all* UN world conferences. It was also incorporated into the Millennium Development Goals, the third being "to promote gender equality and empowerment of women". At the same time, female poverty came under the gaze of global public culture from the early 1970s through the diffusion of a pithy and polyvalent phrase, the "feminization of poverty". Less persuasive where it was understood as signalling an ongoing trend (female poverty was growing), but effective as a way of underlining the point that *poverty was a gendered experience*, the "feminization of poverty" entered the policy lexicon in the 1980s and 1990s.<sup>43</sup> For all its weaknesses, it signalled a widespread acceptance among donor groups and international development agencies that poverty and gender were strongly correlated.<sup>44</sup> The "persistent and increasing burden of poverty on women" was one of the 12 critical areas of concern within the 1995 Global Platform for Action. That feminist advocacy and analysis had made their mark in this domain is illustrated by the Development Assistance Committee of the Organisation for Economic Co-operation and Development (DAC/OECD 2001) Guidelines on Poverty Reduction, which offers what is, in effect, a gender analysis of poverty.

The guidelines go on to cite gender as a major cause of poverty and impediment to development and acknowledge the need to mainstream gender even in areas such as national budgets that are traditionally gender blind.

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<sup>41</sup> Francis (2003) documented the resistance of the World Bank to accepting the feminist analysis of the gendered costs of the adjustment process, tracing the first acknowledgement to the end of the 1990s.

<sup>42</sup> The Beijing Declaration and PFA can be found at [www.un.org/womenwatch/daw/beijing/platform](http://www.un.org/womenwatch/daw/beijing/platform).

<sup>43</sup> See Chant (2006, forthcoming and 2007) for a thorough examination and critique of this phrase.

<sup>44</sup> As Jackson (1998:43) rightly commented, this term "has come to mean not as a gender analyst would suggest, that poverty is a gendered experience, but that the poor [were] mostly women".

### Box 1: Gender and poverty

Gender inequality concerns all dimensions of poverty, because poverty is not gender neutral. Cultures often involve deep-rooted prejudices and discrimination against women. Processes causing poverty affect men and women in different ways and degrees. Female poverty is more prevalent and typically more severe than male poverty. Women and girls in poor households get less than their fair share of private consumption and public services. They suffer violence by men on a large scale. ... Gender inequality is therefore a major cause of female and overall poverty. ... Gender-related "time poverty" refers to the lack of time for all the tasks imposed on women, for rest and for economic, social and political activities. It is an important additional burden which in many societies is due to structural gender inequality—a disparity which has different meanings for women and men (DAC/OECD 2001:40).

The World Bank too, initially resistant to the gender critique of structural adjustment, began to show more interest in the poverty-gender link. In 1989, its principle rationale for "investing in women" was that it could be a "cost-effective" way to promote "economic efficiency". However, later reports show the influence of gender analysis on the New Poverty Agenda. The *WDR 2000/2001* notes that gender inequality is "of such pervasive significance that it deserves *extra emphasis* compared to other inequalities", and suggests that eliminating legal discrimination is key to the empowerment of women.<sup>45</sup> The World Bank's (2001b) main 'millennium' effort on gender is contained in *Engendering Development 2001*, which provides a panoramic overview of the state of the world's women. The policy approach, however, remains closely identified with market-led growth and makes few concessions to the gender critique of neoliberal policies. There is some development of the analysis in *Integrating Gender into the World Bank's Work: A Strategy for Action 2002*, which identifies four different dimensions of gender and poverty that are recommended as diagnostic in the planning of PRSPs: these are opportunities, capabilities, security and empowerment. At the same time, the World Bank recommended that each country with an active lending project now had to prepare a periodic Gender Assessment, and assigned more resources to support operational interventions. The importance of gender mainstreaming is also underlined. World Bank advice on how to incorporate a gender perspective into PRSPs is made available on its Web site.<sup>46</sup>

Given this growing awareness of gender analysis, the NSP might be understood as a response to the accumulated criticisms of the reductive economism and top-down character of development policy and practice: in its emphasis on participation, good governance, women, poverty relief, and community and social life, it appears to address what was ignored in the first phase of structural reform. If, as is widely argued, women bore particularly heavy costs during the adjustment years, we might expect closer attention to their needs in NSP-inspired antipoverty programmes. Some of this has indeed occurred and women have become more visible in the New Poverty Agenda. They were identified as a primary target for poverty relief for microcredit, direct household transfers and participatory projects. From being the "invisible army" of crisis management during the 1980s, women were now to be rendered visible and endowed with voice and presence in development practice. They were discovered, not for the first time, to have something to contribute to development programmes.

The NSP's emphasis on greater democracy, co-responsibility, accountability and participation raises a range of questions about the way that gender relations inform the new welfare programmes. Do they take account of gender analysis in their conception and praxis? To what extent are they dependent upon existing gender divisions and to what extent are they serving to deepen, through explicitly female targeted programmes, existing divisions? Is women's contribution seen in largely instrumental terms, whether in the form of voluntary labour, social capital or returns to lenders in microcredit schemes? How important (and how recognized) is women's unpaid labour to the success of these programmes? How are women incorporated into poverty relief programmes and how, if at all, does this differ from men's incorporation? And,

<sup>45</sup> Cited in Johnson-Latham (2003).

<sup>46</sup> See [www.worldbank.org](http://www.worldbank.org). See also the Gender Unit of the World Bank *WDR 2002* and the commentary by Wood (2003).

last but not least, for all that is positive in these new approaches to poverty relief, how effective have they been in addressing the causes of *women's* poverty?

There is a need for more in-depth research on these questions but such evidence as does exist points to a significant gap between the proclaimed gender equality guidelines and the practice. This is not surprising considering that guidelines issued by development agencies such as the World Bank are simply advisory and there are no penalties for failing to comply. A report by the Gender Unit of the World Bank entitled *The Gender Dimension of Bank Assistance* analysed World Bank assistance in 12 countries covering 180 projects and found that while satisfactory results were achieved in health and education,

the Bank has been weak in promoting the economic participation of women and in improving the Borrower's institutional framework for gender, thereby reducing the overall development effectiveness of its assistance (2002:1).

The report further found that despite the fact that the World Bank is required to monitor the gender impact of its assistance, its efforts in this regard were found to be "negligible". Another gender-focused evaluation of 100 World Bank projects shows disappointing results and concludes that gender issues were, in fact, "widely neglected" in their design and implementation (Wood 2003:86). In its 2004 report on progress, the World Bank found that despite the improved advice and resources available to monitor gender progress, and greater attention to gender issues in project design and supervision, only a minority of countries and programmes had responded (Prügl and Lustgarten 2006:63).

Evaluations of PRSPs have come to similar conclusions in regard to gender sensitivity. One might have expected that PRSPs would have a better record on gender sensitivity since gender is identified as a key to project success along with participatory methods in the design of projects. However, little progress has been registered here too. A review by the World Bank's Gender Unit of 15 PRSPs completed by 2001 found that less than half discussed gender issues in any detail in their diagnosis of poverty. Even fewer incorporated a gender analysis into their implementation and evaluation sections (Kabeer 2003). Bradshaw and Linneker (2003:16), who analysed two PRSPs, one in Nicaragua, the other in Honduras, found that there was no attempt to deal with the specificity of women's poverty, and in the participation process women were not considered a distinct interest group and participated "in their capacity as civil society actors rather than as 'gendered' beings". Another investigation into Poverty Reduction Strategies developed with support from the World Bank found that issues of gender equality, and women's and men's differential access to resources and opportunities, were not taken into account in most analyses and policy proposals. Three PRSPs—from Bolivia, Viet Nam and Zambia—were found to be negligent in regard to gender; the Latin America case, Bolivia, emerging as the least gender sensitive of them all. De Vylder (2003:20) reported that even the poverty diagnoses were "astonishingly gender-blind, genuine mainstreaming (was) quite limited and many key chapters in all 3 reports (were) void of any reference to gender". Further findings were that women were frequently lumped together with other vulnerable and disempowered groups, notably children and the disabled, whose needs were very different. In general, the report concluded, gender analysis was "either absent or highly unsatisfactory, and the policy actions suggested are often exceedingly vague (viz: 'improve conditions for women')". In short, lip service is paid to "gender mainstreaming", but not to what to do or how to do it (De Vylder 2003:20). Yet another detailed report on PRSPs in four countries, including Bolivia, voices similar concerns (Whitehead 2003).

The development agencies can claim, with varying degrees of justification, that they do not bear sole responsibility for these outcomes since programmes are usually developed and implemented by governments or in collaboration with them. PRSPs are conceived as being more country specific and are intended to be developed to meet local needs through participation and consultation. There is a shortage of accessible studies of how this "partnership" works, in practice, let alone how governments conceptualize, design and manage these programmes. Latin American

ministerial documents regarding poverty programmes show a growing focus and policy consensus on the multidimensional aspects of poverty, stressing the need to develop the capabilities of the poor, along with empowerment and voice. However, these ideas are, for the most part, still only vaguely or partially reflected in policy design and implementation, as grassroots accounts and an extensive literature attest.<sup>47</sup> Governments naturally vary in the support they give to gender equality and women's projects, and in how far such support is backed up by adequate institutionalization and funding. Gender analysis makes a rhetorical appearance in some programmes but it is frequently disregarded in practice. Meanwhile, effective policy making is hindered by the lack of reliable data, as indicators used to assess the scope and magnitude of poverty are rarely or insufficiently disaggregated to show sex difference. Poor data collection and poor follow-up add to the lack of reliable evaluative mechanisms for policy feedback processes.<sup>48</sup> This is compounded by institutional weaknesses in many countries with poverty programmes often spanning many different departments and several ministries, leading to a lack of coordination and consistency in approach. Gender equality agendas are all too easily crowded out in such environments.

At the same time, however, governments in Latin America have come under sustained pressure from women's movements and policy units to incorporate gender sensitivity into their policies, and this, together with the increased role of NGOs in service delivery, has expanded the potential for gender-sensitive programmes to be developed. Many states have adopted the Regional Programme of Action for the women of Latin America and the Caribbean (1995–2001), which called for the ending of wage discrimination and the enforcement of respect for labour rights. It also called for guaranteed access to welfare and social security systems to improve the working conditions of women in the informal sector and who undertake unpaid work. Poverty reduction has been a major demand of women's lobbies, and governments have generally acceded at least in principle to these pressures from various quarters.

In practice, much depends on the sympathy of the ministry involved, the degree of influence enjoyed by women's advocates and NGOs, and the objectives of the programmes concerned. While feminist NGOs have pioneered projects that incorporate equality principles, and have been able to develop their own research capacity considerably in recent years allowing closer attention to women's needs, the evidence shows that they have less impact on policy than on local or small-scale project design. Women's organizations find it hard to make an impact on social policy provision and on the fast-proliferating antipoverty programmes, and many do not even try, preferring to remain "outside power". A history of co-optation and clientelization of women's movements by political parties, exemplified in the Peruvian case examined later, tends to deepen the divisions between those who work "in the state" and "against the state", limiting the scope for cooperation in this vital area for equality interventions. It remains the case in the Latin American region that most policy makers see no need to incorporate a gender analysis in their poverty programmes, reasoning that policies benefiting the poor "necessarily benefit women", eliding women with poverty in a simple reduction that exports gender analysis altogether. This attitude reportedly surfaced even in a context of an active feminist movement in relation to Brazil's Bolsa Escola programme. Yet, as Jackson (1998:39) has argued, the concept of poverty cannot serve as a "proxy for the subordination of women". It would not be unfair, given this scenario, to conclude that despite the formal recognition of the gender-poverty link, many antipoverty programmes have remained for the most part innocent of gender analysis; there is little to distinguish them in this regard from their antecedents in the "women and poverty" approach identified by Moser (1993), which was premised on the assumption that it was enough to integrate women into development programmes. Yet, if programmes fail to problematize gender relations, they risk perpetuating gender inequalities not least by remaining locked into norms of public culture based on conceptions of femininity and gender relations that fail to correspond to the realities of most poor women's lives.

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<sup>47</sup> See, for example, Cornwall (2003) and Cook and Kothari (2003).

<sup>48</sup> There are exceptions: see, for instance, the governmental Web sites of Chile and Mexico.

If the current focus on poverty has its novel features, it is, as noted, also marked by a continuum with earlier women and development approaches that focused on women as a way to secure broader development objectives, while failing to tackle the underlying causes of gender inequality. As we shall see, many of the new poverty relief programmes make use of women to administer them but do little to address their needs. Nevertheless, it is important to note the considerable diversity in the conception and implementation of these new programmes. Variant forms of the NSP exist and are applied across the region, and are informed by different policy logics with different gender implications. While most development institutions see poverty in terms of a lack of access to the market, and hence concentrate on building suitable capabilities or forms of market access, some emphasize the need to build a stronger civil society in order to enhance the efficiency of welfare delivery and to counter the negative trends that have deepened the processes of social marginalization. Some, indeed, do both. The point, however, is that the objectives of the projects help to determine how women will be involved and how they are affected.

Evaluating poverty relief programmes from a gender perspective is not as straightforward as it might appear from the many manuals that exist on the subject. Such an analysis would at a minimum require an assessment of the broader policy environment on the programmes and an analysis of the medium- to longer-term impacts on the participants' lives. Sensitivity would have to be shown to the ways in which forms of social differentiation such as gender, age, ethnicity and geographical location (for example, rural/urban) impact upon programme efficiency. Women are not only differently situated to men in relation to social programmes, but also to other women; they enjoy varying degrees of access, quality of provision and satisfaction, depending on their class and status, the assets they command and their capabilities. Even if such factors can be taken into account, there is the question of what premises are to frame the evaluation itself. Assessments of antipoverty programmes vary in the criteria of success that they employ and prioritize, and depart from a diverse range of theoretical positions and political stances.

Gender analyses of such programmes reflect these variations<sup>49</sup> and there are, in addition, noticeable divides between scholars across disciplines, and between these and practitioners who may be more concerned with the practicalities of project and policy design. For all their differences, it is possible to identify three common questions as central to any gender sensitive evaluation: first is that of whether the needs, priorities and realities of the populations that these programmes are designed for are adequately addressed; second, whether, and if so how far, antipoverty programmes or projects can be considered to have applied gender *equity* principles. And third, to what extent are these policies transformative in positive ways, that is, do they enhance women's capabilities and enlarge their choices?

In what follows, we shall consider different approaches to poverty relief in comparing two antipoverty programmes: the human development programme Progresas/Oportunidades, established in Mexico in 1997, and the food programme known as the Comedores Populares or People's Kitchens in Peru. Both programmes have their recent origins in earlier poverty relief programmes that were established in response to the social crisis accompanying the adjustment phase. However, Progresas/Oportunidades is designed on the basis of NSP principles, while the Comedores combines elements of cooperative management with traditional philanthropic food programmes. In keeping with prevailing trends, women (and gender relations) are central to the functioning and success of these programmes with mothers, more often than not, situated as key actors in the management and delivery of services to the programme.<sup>50</sup> However, as is detailed below, the premises on which they work imply different outcomes in terms of gender equity and well-being for the women involved and raise some critical questions for policy design. We begin with a consideration of the Mexican case.

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<sup>49</sup> See, for example, Adato et al. (2000); Armas (2004); Serrano (2005).

<sup>50</sup> Some gender analyses of Latin American antipoverty programmes have begun to appear. See, for example, Serrano (2005).

### ***Progres/Oportunidades***

Mexico, a member of the OECD since 1994, is among the dozen largest economies in the world, but poverty has been estimated to afflict almost half of the population, with a fifth in extreme poverty, due to its highly skewed income distribution.<sup>51</sup> Social divisions inherited from the colonial period and deepened through urban bias exist along regional, ethnic and gender lines, with 44 per cent of indigenous Mexicans found in the poorest income quintile. Mexico's state welfare system is based on formal employment but coverage is restricted to just 55 per cent of the population due to the character of its labour market (Laurell 2003:324). Up to half of the economically active population depends upon the informal sector for its income, and has access to few benefits. Moreover, the size of the informal sector contributes to Mexico's low tax revenue.<sup>52</sup> However, since 2000, Mexico has seen a reduction in the incidence of poverty with extreme poverty falling to 17.6 per cent in 2003/2004.<sup>53</sup> This is adduced in part to improved social protection programmes, along with remittances and a fall in the price of some consumption goods (Yaschine and Orozco 2006:3).

The election of National Action Party (PAN) leader Vicente Fox in 2000 ended 71 years of one-party rule by the Institutional Revolutionary Party (PRI), and was accompanied by efforts to reform existing institutions along more democratic and accountable lines. Fox pledged to make social justice a priority of his government, recognizing that poverty was a "multidimensional phenomenon", and raising social expenditure by an average of almost 10 per cent per annum. The main poverty relief programme directed at those in extreme poverty, Progres/Oportunidades, was substantially modified and relaunched in 2002 under the name of Human Development Opportunities (Desarrollo Humano Oportunidades) known today as Oportunidades. The programme's coverage, formerly on the rural poor, was extended to include urban and semi-urban areas,<sup>54</sup> and the number of those inscribed in the programme was expanded from 2.6 million families (in 1999), the equivalent of 40 percent of all rural families (Rocha Menocal 2001:520), to 4.2 million families in 2002 (of whom 2.9 million were rural) (González de la Rocha 2003:14). By 2005/2006, it covered five million households with an estimated 25 million individuals and reached almost all of those in extreme poverty.

Oportunidades is the second most extensive programme of its kind in Latin America.<sup>55</sup> It is also widely believed to be the most successfully developed example of the new cash transfer programmes.<sup>56</sup> It has been judged to be particularly effective in meeting its goals, an outcome attributed to an unusually high degree of presidential support and interministerial

<sup>51</sup> ECLAC (2004) and the Mexican government's estimates broadly agree that 45 per cent of the population live under conditions of poverty, while other estimates put the figure as high as 61 per cent in poverty and 26.5 per cent (25 million) in extreme poverty (see also Urquidí 2003).

<sup>52</sup> In 1990, social expenditure accounted for 6.1 per cent of GDP. It rose to 9.5 per cent in 2000 (IMF 2002:18) and was further increased under the Fox administration. In the first half of the 1990s, Mexico collected only 11 per cent of GDP in tax, well below the average for Latin America (which was 14 per cent in the first half of the 1990s) and below that of relatively low-tax countries such as the United States (IDB 1996).

<sup>53</sup> Mexican government calculations show that by 2004 the incidence of poverty in their tripartite definition was 17.3 per cent for food poverty, 24.6 per cent for capabilities poverty and 47 per cent for asset poverty, mainly concentrated in the rural areas (Yaschine and Orozco 2006:2).

<sup>54</sup> Progres/Oportunidades was preceded by Pronasol, also known as Solidarity, Mexico's first large-scale antipoverty programme. Established in 1988, its conception of poverty relief was quite different from Progres/Oportunidades, having party political objectives. It was designed by the Carlos Salinas administration to offset the political consequences of the adjustment years and revive the flagging political support of the PRI. According to Molinar and Weldon (1994), Pronasol's regional priorities were developed with three aims in mind: to reward PRI loyalists, to reconvert Party of the Democratic Revolution (PRD) supporters and to punish PAN supporters (Rocha Menocal 2001:524). Such manoeuvres delivered the expected returns to the ruling party, but the programme was discredited. When Ernesto Zedillo assumed the presidency, he replaced Pronasol with Progres/Oportunidades, claiming that his new antipoverty programme did not have a political agenda (Rocha Menocal 2001:513). Although some political bias continued, it was much reduced, and the PRI lost the 2000 elections to the opposition PAN party. Oportunidades has since sought to distance itself from this history of political clientelism, with a public campaign message stating that social protection is a right and allegiance is not due to any political party.

<sup>55</sup> It was topped only by Brazil's Bolsa Familia programme, which reached eight million beneficiary families by the end of 2005.

<sup>56</sup> The designer of Progres/Oportunidades was Mexican Under-Secretary of Expenditure Santiago Levy at the Ministry of Finance, who became director of the Social Security Institute (Instituto Mexicano de Seguro Social). The demographer José Gómez de León, then the director of the National Institute of Public Health, is also credited with originating the programme. Although broadly in line with the principles of targeting and co-responsibility developed at the World Bank in the late 1980s and early 1990s, and with the demands of fiscal discipline associated with SAPs, Progres/Oportunidades was not imposed by the Bank. The programme was intended to run only on federal funds with no direct funding from the World Bank. Oportunidades is government funded with loan support from the IDB as described above.

collaboration, along with an annual budget (in 2004) of 25 million pesos<sup>57</sup> and a loan of \$1 billion from the Inter-American Development Bank (IDB). Its operating budget was \$2.4 billion in 2006.<sup>58</sup> An undoubted strength of the programme is that it has been subject to regular evaluations, including by outside bodies and gender advocacy organizations,<sup>59</sup> and it has been responsive to suggestions for improvements and modifications. Oportunidades is a targeted cash transfer programme that aims to combine short- and long-term objectives of sustainable poverty reduction, as advanced by the social risk management approach (Holtzmann and Jorgensen 2000). As noted earlier, this approach aims to tackle poverty through helping the poor to “cope, mitigate or reduce” their risk of falling into or being trapped in poverty.<sup>60</sup> Oportunidades specifically aims to improve human development by focusing on children’s education, nutrition and health. Isabel Guerrero, director of the World Bank in Colombia and Mexico, sees “investment in the human capital of the poor as part of a strategy to secure greater economic competitiveness”.<sup>61</sup> Oportunidades is based on the assumption that poor households do not invest enough in their human capital, and are thus caught in a vicious circle of intergenerational transmission of poverty with children dropping out of school and destined to suffer the long-term effects of deprivation. Families selected for the programme are, therefore, helped through cash transfers every two months with the costs of having children in school. The transfers are primarily in the form of “scholarships” for children to attend school.<sup>62</sup> The practical functioning of the programme centres on mothers as the key to securing improvements in the life chances of their children, born and unborn. It seeks to strengthen, through training and monitoring, mothers’ responsibilities for children’s health and education and to improve the nutritional status of their children (and of themselves, if they are pregnant or breastfeeding). The mothers attend workshops on reproductive health and family nutrition. Secondary outcomes such as building women’s capacities, empowerment, citizen participation, strengthening community ties and even gender equality are part of the programme’s goals, but how these are interpreted has varied over time and the quality of what is on offer under these headings depends upon local authorities and cooperating professionals.

Oportunidades’ targeting process follows a technical selection procedure comprising three stages: (i) localities are identified through poverty map definitions; (ii) extensive household surveys are conducted in the chosen localities to gather data on a number of welfare indicators; and (iii) the data are fed into a computer that selects the beneficiaries according to a formula that determines who are the indigent or “extreme” poor, defined as those “households that do not have enough resources to satisfy their basic food needs” (Progresa 1997, cited in Yaschine 1999:54).

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<sup>57</sup> In December 2006, \$1.00 = 10.8 Mexican pesos. The programme’s budget was increased four times between 2000 and 2006, making it the highest for a federal government programme, representing 0.4 per cent of Mexican GDP, and 3 per cent of public expenditure for redistributive programmes (Yaschine and Orozco 2006:14).

<sup>58</sup> Its future following the 2006 elections was debated, and changes of personnel would affect some aspects of its functioning, but it is difficult to see how it could be dismantled given its record.

<sup>59</sup> The ministry responsible, Secretariat of Social Development (SEDESOL), works with individuals and organizations that promote gender analysis. There is also a feminist watchdog organization, Observatorio, which carries out evaluations and advises on pilot studies to advance the aims of the programme.

<sup>60</sup> Here the official rhetoric of Contigo (see below) closely parallels that of the World Bank.

<sup>61</sup> See <http://web.worldbank.org/wbsite/external/topics/extpoverty>, accessed on 3 September 2004.

<sup>62</sup> Monetary and educational grants are provided for each child under 22 years of age who is enrolled in school between the third grade of primary and third grade of high school.

### Box 2: The objectives of Oportunidades

The objectives of Oportunidades are to:

- improve the conditions of education, health and nutrition of poor families, particularly children and their mothers;
- integrate these actions so that educational achievement is not affected by poor health or malnutrition in children and young people, or because they carry out work that makes school attendance difficult;
- ensure that households have sufficient resources available so that their children can complete their basic education;
- encourage the responsibility and active participation of parents and all family members in improving the education, health and nutrition of children and young people; and
- promote community participation and support for the actions of the programme so that educational and health services benefit all families in the localities where it operates as well as uniting and promoting community efforts and initiatives in actions that are similar or complementary to the programme.

Nevertheless, from 2001, with the incorporation of urban and semi-urban areas, two new mechanisms for selecting beneficiaries were adopted. The first was applied to semi-urban “Basic Geostatistical Areas” with a large concentration of poor households and with poor provision of social services. Surveys then identify which households should be selected for inclusion in the programme. The second mechanism of selection is applied to larger urban areas, where the potential beneficiaries have to apply to be included in the programme. After the application process, the information is double-checked and the beneficiaries are chosen according to the established formula (González de la Rocha 2003:16). Registration in the programme is for an initial three years, renewable if the family still qualifies as extremely poor with children of school age.

Oportunidades’ guiding principles are explicitly designed to differentiate it from assistentialist programmes through an emphasis on the participants’ “active management” of their risk through “coresponsibility” (*cogestión* or co-management): as proclaimed on its Web site;<sup>63</sup> “coresponsibility” is an important factor in this programme, because families are expected “to take an active part in their own development, and to move beyond the *asistencialismo* and paternalism” that characterized earlier welfare systems (SEDESOL 2003). Co-responsibility in this context is understood as cost sharing, where beneficiaries contribute labour for the implementation of projects (Yaschine 1999:50). This principle is enshrined in the Social Development Law (Ley de Desarrollo Social of 2004), which provides the legal and operational framework of Contigo (With You), the new social assistance package of which Oportunidades is a component. As Rivero (2002:3) expressed it, in Oportunidades “responsibility for health and education is to be recognised as not solely the government’s but the whole society’s, and should be assumed by the entire community”. However, the responsibility of the “entire community” is perhaps better described as being devolved to mothers who are those designated as being primarily responsible for securing the programme’s outcomes.

Co-responsibility is formalized through a quasi-contractual understanding that in return for the entitlements proffered by the programme, certain obligations are to be discharged by the two parties, that is, by the programme and the participating mother. This conditional form of entitlement, although well established in other regions, and originating in the United States, is of more recent origin in Latin America but it is now being widely adopted.<sup>64</sup> In this case, the responsible participants (mothers) receive their stipend conditional on fulfilling the duties laid

<sup>63</sup> See [www.progresia.gob.mx/htmls/quienes\\_somos.html](http://www.progresia.gob.mx/htmls/quienes_somos.html), accessed on 15 May 2003.

<sup>64</sup> According to Programme Director Rogelio Hermosillo, by 2005 the majority of Latin American countries had sought advice on how to set up similar programmes.

out by the programme managers: this involves taking children for regular health checks, meeting targets for ensuring their children's attendance at school, attending workshops on health and programme coordinators meetings and contributing a set amount of hours of work to the community (known as *faenas* in indigenous communities), typically for cleaning buildings or clearing rubbish. Failure to comply with the requirements can lead to being struck off the programme.

How successful has the programme been in its own terms and how is it viewed by participants? As noted, Oportunidades is subject to regular evaluation exercises in which independent bodies have been involved.<sup>65</sup> These have documented a reduction in household poverty and improved school attendance, health and nutritional levels of those inscribed in the programmes. There has also been progress in detaching poverty relief from clientelistic and corrupt political practices. Escobar Latapí's and González de la Rocha's (2004) qualitative research confirmed Skoufias et al.'s (2001) findings that the largest positive impacts were on children in secondary school where drop-out rates are commonly high. The latter's survey finds a 10 per cent increase in enrolment for boys and 20 per cent for girls along with an overall narrowing of the gender gap in education, particularly in primary school. In 2002–2003, four million children benefited from the transfers and the impact was especially notable in marginal rural areas: here the number of children entering first grade of baccalaureate rose by 85 per cent and in second grade by 47 per cent. Drop-out rates decreased by 24 per cent with a corresponding rise in completion rates for secondary school in rural areas of 23 per cent.<sup>66</sup> Other studies found fewer children suffering from stunted growth, and under fives covered by the programme were also reported to have a 12 per cent lower incidence of illness and better growth rates than non-programme children of the same age group. As well as these effects and significant improvements in regard to children, there were spillover effects on households. Having a child in school is a major cause of increased vulnerability along with a decline in well-being, and financial help at this time is an essential part of poverty relief and human capital development (Linneker 2003). This is especially important where, as in Mexico, some of the costs of education (uniforms, books, transport) are assumed by the family and where voluntary contributions (*cuotas*) are also levied.

These improvements are welcome and significant, but they need to be qualified in the light of more critical appraisals. Yachine (1999) has argued, for instance, that even better results could have been achieved if closer attention had been paid to remedying the deficiencies of some of the institutions that the programme relied upon. As she argued, building human capital requires that health and education services are available and of reliable quality. However, in the early phases of programme social services in poor communities were inadequate and insufficient to absorb the increase in demand resulting from the programme. Many schools suffered and still suffer from chronic staff absenteeism, and the services offered by the health sector are often deficient and costly, and unable to meet the increase in demand due to the programme. Since then, and following further evaluations of the programme, better coordination between sectors has been achieved in some areas with positive if scattered results. However, Escobar Latapí and González de la Rocha (2004) confirmed in their later evaluation that the poor health of many interviewees was a major factor impeding their progression out of poverty. In some cases, the programme's transfers allowed some men to withdraw from work on health grounds. Poor health remains a critical issue for households in poverty and as women are primary carers, improvements in health have positive consequences for their ability to fulfil this role.

As far as the design of the programme is concerned, there appear to be two main criticisms that participants and professionals associated with it have made that raise some general issues of principle. In an exercise designed to elicit the opinions of beneficiaries, targeting and co-

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<sup>65</sup> The International Food Policy Research Institute's (IFPRI) evaluation covered the three years up until 2000, and as a result of its findings the programme was extended to rural areas (Skoufias and McClafferty 2000). The results of a qualitative evaluation carried out in six communities by Escobar Latapí and González de la Rocha were published in 2004 and are referred to here.

<sup>66</sup> Primary education was made compulsory under the 1917 Constitution. The 1993 Education Act made secondary education compulsory as well as a right. Parents had responsibility for ensuring attendance. No sanctions are imposed for failure to attend.

responsibility aroused some negative reactions.<sup>67</sup> While few of the respondents who participated in the programme doubted that Oportunidades had helped them in their struggle against poverty, there were criticisms of the way targeting was applied. Despite the apparent rigour of the selection mechanisms, and despite the claim that the programme is intended to be seen as a way to “(access) a social right in a situation of social inequality” (Rivero 2002:6), the targeting process attracted the strongest criticism from participants in evaluation exercises. Along with a general sense that more information should be made available on the programme and on the means-testing mechanism itself, dissatisfaction was expressed over the selection, which was felt to be arbitrary, excluding people whose needs were considered just as pressing as those included in the programme. Means-testing was also felt to generate a lack of trust, social divisions and feelings of envy and exclusion among those not selected. Skoufias (2005:2) noted that “targeting of the population has introduced some social divisions between beneficiaries and non-beneficiaries”, a point also made by González de la Rocha (2003:17). These are common problems faced by targeted social protection programmes in contexts where poverty is widespread and deep, although Oportunidades’ coverage is more extensive than most programmes reaching 96 per cent of those in extreme poverty, a factor which has caused it to be dubbed by those in charge of it as “a near universal programme”.<sup>68</sup>

A second general complaint voiced by participants in the programme was that they felt “discriminated against” by its demands on their time. They believed that they were “treated badly or...were asked to do things in ways that offended their dignity” (Rivero 2002:4). As they expressed it, because they were “paid by the government” they were expected to perform community work, such as cleaning schools and health centres, while others in the community did not.<sup>69</sup> Some critics of the programme have further pointed out that in indigenous communities there are customary obligations (*faenas*) carried out on a collective basis for the general good, but women in the Oportunidades programme find it difficult to maintain these commitments along with those of the programme, with adverse consequences for social solidarity.

Some complained of being made to do “absurd” tasks by programme managers just for the sake of keeping them occupied. The requirement to do community work had been incorporated into the earlier programme and was continued into the new post-Progresa design by the Fox administration, but following recommendations by evaluators, the amount of work time contributed was in theory reduced, and it is still an issue under consideration. In light of such findings, it is not surprising that there was, among some communities, resistance to accepting the notion of “co-responsibility”. Rather, the requirements of the programme were seen in terms of “obligations”, and participants felt that *genuine* co-responsibility would also oblige teachers to accept their responsibility not to miss classes so often. This “inequality of responsibility” made some participants resentful of the way they were expected to meet targets set for monitoring the health and education of their children and risked being ejected from the programme for failing to do so. Why, they asked, should a teacher’s salary not be reduced if they fail to turn up to teach, since mothers were fined for not meeting their targets (Rivero 2002:5)?<sup>70</sup> This latter point reflected a general criticism that there were few reliable mechanisms of accountability where complaints regarding the behaviour of officials or professionals could be processed. Nor were the participants given an active role in the design, management and evaluation of the programme (González de la Rocha 2003). It is hard to square these findings with the view that the programme was intended to function “as a way of exercising civil,

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<sup>67</sup> This exercise carried out in 2000 and supported by the World Bank, the United Nations Development Fund for Women (UNIFEM) and the Mexican government charged three NGOs in different regions with the task of investigating the attitudes of beneficiaries toward the programme. The results are summarized in Rivero (2002), and similar findings are found in other evaluations.

<sup>68</sup> As stated by the director of the programme in July 2005. In some poor regions, coverage is as high as 95 per cent.

<sup>69</sup> In the Progresa programme, such work involved on average 29 hours per month.

<sup>70</sup> More generally, as an IFPRI evaluation notes, “if the programme is to have a significant effect on the human development of children, more attention needs to be directed to the quality of education provided by schools” (Skoufias 2005:2).

political and social rights and as a means to achieve full citizenship” (Rivero 2002:6).<sup>71</sup> Several evaluations have also criticized deficiencies in the quality and availability of health care, which has not been able to cope adequately with the expanded demand generated by the requirements of the programme.<sup>72</sup>

### ***Gender relations: Now you see them, now you don’t***

Oportunidades’ self-descriptions state that among the main aims of the programme is that of “strengthening the capabilities of beneficiary family members”. Through its adoption of a “gender perspective”, it seeks “to promote the equal access of women to its benefits”, recognizing that “poverty acquires different forms according to the inequalities that prevail between the sexes” (SEDESOL 2005:8). Indeed, one of the claims made by Oportunidades is that it has helped to empower the mothers and daughters who are its beneficiaries. It is to this claim that we now turn.

It is clear that the design of the programme shows evidence of gender awareness: gender is not only incorporated into, but is central to the management and design of Oportunidades. First, the programme was one of the earliest in Latin America to give the financial transfers (and principle responsibilities associated with them) to the female head of participating households;<sup>73</sup> second, the transfers associated with children’s school attendance involved an element of affirmative action. Stipends were 10 per cent higher for girls than for boys at the onset of secondary school, which is when the risk of female drop-out is highest.<sup>74</sup> And third, the programme’s health care benefits for children were supplemented by a scheme that monitors the health and provides support for pregnant and breastfeeding mothers and children under two years of age. The fourth aspect of the project design that displays gender sensitivity is the goal to promote the leadership and citizenship of the women subscribed. Some training schemes have been developed with assistance from local women’s NGOs, and some projects also contain an explicit commitment to incorporating a gender-equity perspective seeking to develop women’s capabilities within their localities. These goals are, however, inconsistent: they represent a combination of *equality* measures (for the girls) and *maternalist* measures for their mothers. What, then, *are* the outcomes and gender impacts of the programme?

There is unfortunately at the time of writing, a paucity of appropriately detailed evidence on this question, and far from sufficient to make any accurate assessment.<sup>75</sup> Most information that is available comes from large-scale surveys by Adato et al. (2000), Skoufias and McClafferty (2000) and Skoufias (2005) and qualitative research by Escobar Latapí and González de la Rocha (2004). These allow certain general points to be established. In the first place, as is well known, improving the educational opportunities of girls has strong potential to enhance their self-esteem and life chances, while at the same time sending a message to households and to communities that girls are “worth investing in”. Second, stipends paid directly to mothers are widely accepted to benefit their households through more equitable redistribution, but in giving women direct control over cash resources, their standing in their communities as well as their leverage *within* the household can be enhanced. The evidence from evaluations of the Mexican programme confirm these generalities, although as one evaluation noted, while the mothers enjoyed some increased autonomy, this did not necessarily translate into

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<sup>71</sup> Since the programme strives to separate social entitlements from political clientelism, this is another sense in which citizenship is understood to have been promoted.

<sup>72</sup> All cited evaluations made this point. See, for example, the evaluation (2004) by the Institute Nacional de Salud Pública and the Centro de Investigación y Estudios Superiores en Antropología Social available on the its Web site at [www.insp.mx](http://www.insp.mx). The latter found that around 70 per cent of birthweights were incorrectly recorded and that teachers were guilty of registering children’s attendance in return for favours. It concluded that after seven years, people had “lost their fear of the programme” (Pastrana 2005:4).

<sup>73</sup> The real impact of channelling resources to the household through women is largely unknown. Some suggest an association between giving such resources to women and a rise in conflict within the household and violence against women; however, evidence is often anecdotal and as such is often, or easily, ignored.

<sup>74</sup> Grants rise with the age of the child and the sex difference in the grant starts with secondary school, which is normally when girls drop-out. In the third year of secondary school, monthly grants are about \$58 for boys and \$66 for girls.

<sup>75</sup> At the time of writing, an audit of the gender effects of the programme was under discussion.

empowerment, since the latter depended on more factors than control over a small money income. Women did, however, appear to feel that their self-esteem and financial security was enhanced as a result of the stipends (Escobar Latapí and González de la Rocha 2004); they also felt that they acquired more status in their neighbourhoods, with shopkeepers treating them with more respect as they became creditworthy. They appreciated the programme's education and training projects (including health and community leadership) where these were well organized, but they also wanted more access to education and training (Adato et al. 2000; author's interviews, 2005).

More research into the gender impacts of the programme is needed to establish if it is producing a redistribution of power and status within households and, if so, to explain what effects this status reordering has on household livelihoods and well-being. In some contexts, transfers paid directly to women have the potential to generate conflict if men feel that they are entitled to control money resources and resent any undermining of their authority. However, a small-scale study of men's attitudes carried out by Maldonado et al. (no date) in three rural communities found no strong evidence linking women's receipt of stipends to a rise in the incidence of violence in the home.<sup>76</sup> The stipend was apparently viewed by men as expressly intended for the benefit of the children, "not as money belonging to their mothers"; the report states that since the women merely administered the funds for the education and well-being of their children, this was not seen as a cause of conflict. However, despite these findings, expert opinion is divided over the reliability and generalizability of the data collected on this sensitive issue.<sup>77</sup> Whether it has risen or not as a result of the programme, violence against women, particularly in indigenous communities, remains a serious problem that has not been sufficiently addressed by community leaders and government authorities.<sup>78</sup>

Where the programme claims that women have been empowered through their participation, this might need to be qualified in the context of more critical appraisals. While some of those available refer to the earlier years of the programme, they indicate issues that arose, some of which are ongoing. One evaluation of Oportunidades by the Network of Rural Promotoras and Assessors (Red de Promotoras y Asesoras Rurales 2000) concluded that there was no significant improvement in women's position in their families,<sup>79</sup> the stipend was insufficient to overcome poverty, many health services had to be paid for and were costly, and the programme did not generate employment opportunities for school leavers that would enable the cycle of poverty to be overcome.<sup>80</sup> Escobar Latapí and González de la Rocha (2004) and Espinosa (2006) further noted that the programme did not take sufficient account of women's income-generating and other activities (such as *faenas*) and that as a consequence, women could be overloaded with competing demands on their time. This was even more the case with the voluntary workers (*promotoras*), who dedicated on average 30 hours a month to administrative, pastoral and medical responsibilities

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<sup>76</sup> Women have in some cases been organizing collectively against violence and abuse, and perhaps this explains the findings of one study carried out in 2004 that women in the programme suffered less violence than those outside it. If changes in power relations lead to greater intrafamilial tension, this requires recognition and careful negotiation. In some areas, programme managers have begun to incorporate more gender equity components such as a Renewing Masculinity programme, which has been put in place in rural communities providing an arena for discussing gender relations, violence and public health with both men and women.

<sup>77</sup> This study was based on interviews only with men and, therefore, lacked triangulation. It was carried out in three localities—with 10 men respondents in each locality. According to Adato et al. (2000) and my own interviews (Mexico and Oaxaca, July 2005) with specialists in gender and poverty and with staff of the Oportunidades programme at various levels, there has been considerable evidence of violence against women over control of the stipend in some regions.

<sup>78</sup> On the author's fieldtrip to visit the centre where the stipends were being disbursed, there was the usual long queue of women patiently waiting their turn to collect the stipend, where they had been waiting for several hours since early morning. A member of the Oportunidades team pointed out the dozen or so young women who were missing their front teeth, and others who bore visible signs of injury on their face and upper body. She explained that "the men come back from drinking, they want sex, they want money, and the women refuse them. They get beaten up. It is still treated as normal for men to hit women who don't obey them" (author's field notes, July 2005).

<sup>79</sup> Based on a survey of 309 beneficiaries supplemented by 60 interviews with *promotoras*, teachers and health professionals in eight communities.

<sup>80</sup> Of respondents, 85 per cent reported that their children could not find work in the locality. A new component has been added to the programme since these findings, the Jovenes con Oportunidades, which provides youth training and work experience. However, on a field visit in July 2005, young people I interviewed saw themselves as having no future in their localities and planned to migrate to the United States. Without attention to rural livelihoods, Oportunidades risks educating the young only to send them to the US labour market.

(Red de Promotoras y Asesoras Rurales 2000:13). Adato et al. (2000), among others, also found that women's workload increased as children's contribution to domestic tasks decreased in favour of school demands; where help was available it was generally daughters, not sons, who were involved with domestic tasks and they left school earlier. Another effect of the transfers appears to be that men were doing less income-generating work (Rubio 2002; Escobar Latapí and González de la Rocha 2004).<sup>81</sup> One beneficiary summed up her view of the programme thus: "the government says it is helping me but the only thing it is giving me is a lot of work" (Red de Promotoras y Asesoras Rurales 2000:15). These views seem at odds with the gender equality and empowerment objectives proclaimed by the programme.

Women have received some additional benefits from the programme's education and training projects (including community leadership and human rights), although it is not clear with what precise effects. Other developments include a pilot project financed by the IDB, which promotes productive activity on a self-managed basis for some 34,000 women, and some community saving schemes that are designed to promote women's individual and community development, but these have not been widely adopted. Cash transfers are principally designed for the benefit of children, with any financial returns to be contributed to satisfy household needs. They are not designed to address the specific needs and vulnerabilities of the women on whom the programme depends. There are good reasons for focusing on children's needs. This is not at issue here. The question is whether these programmes, in targeting one group in need, disadvantage another group in the process.

Overall, it is evident that Oportunidades has sought to respond to some of the gaps in its provision and has taken account of the regular evaluations in modifications of its programme. It has shown itself responsive to gender advocacy and has gone some way to incorporating gender equity principles, but its construction of need reveals that different logics operate in relation to daughters and mothers—the former are invested in as citizens, and their capabilities and life chances are expanded through education and health; the mothers, meanwhile, are treated as having responsibilities rather than needs and rights. Oportunidades, therefore, remains in essence a maternalist programme in that it aims to fortify the responsibilities of motherhood as a way to improve the life chances of children. Its human development rationale accurately describes the programme's intent as far as children are concerned, but the programme's combined focus on mothering and reproductive health has made it less likely to develop a more differentiated set of capacities for the mothers who are responsible for ensuring that programme goals are met. Moreover, in failing to grapple with the realities of poor women's lives, it risks adding to their burden of responsibility rather than improving their long-term life chances.

Oportunidades has shown itself responsive to gender advocacy and has gone some way to incorporating gender equity principles and to taking some account of the needs of the mothers in the programme, though its construction of need reveals that different logics operate in relation to daughters and mothers—the former are invested in as citizens, their capabilities and life chances are expanded through education and health; the mothers, meanwhile, are treated as having responsibilities rather than needs and rights. What the long-term effect of this will be, given women's weak income position over a lifetime can only be judged negatively. We will return to these general issues after considering the second antipoverty programme, the Peruvian Comedores Populares.

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<sup>81</sup> Chant (forthcoming) in her comparative research arrived at similar conclusions regarding men's withdrawal of financial responsibility from the family when women's income rises. Armas (2004) showed similar findings for Ecuador's cash transfer programme. More research on this issue in relation to Oportunidades would be necessary to establish whether this was a trend. Pre-2000 data from Skoufias and Di Maro (2006) showed that the programme did not have a large impact on adult participation in the labour market. This needs updating with time-series data; the impact on time allocation also needs more research—this study only analysed 1999 data.

### ***Comedores Populares***

Peru is a middle-income country of 28 million, with a per capita GDP of \$5,678 but, like Mexico, a high proportion of its population lives below the poverty line. It has been estimated that 49 per cent have had some experience of poverty and that there has been an increase in the number of those in poverty in the last 30 years. The data for this period show a deterioration of income distribution and a secular reduction of real income, only recently reversed by increased growth from 2001/2002. According to UNDP figures (2006), 31.8 per cent of the population lives on less than \$2 a day, while the top quintile of the population accounts for 51.2 per cent of income/consumption and the bottom only 4.4 per cent.<sup>82</sup> In rural areas, where the indigenous population is concentrated,<sup>83</sup> poverty is more acute with six out of 10 people qualifying as poor, of whom half are indigent. The reach of social security is limited with some two-thirds of the labour force uninsured and half in the informal sector, with a sizable proportion of the rural population existing on the margins of the market economy.

Peru's economy and society were deeply marked by its experience of guerrilla/military civil violence during the 12 years of the campaign of Sendero Luminoso (Shining Path), with an estimated 69,000 dead or disappeared between 1980 and 2000, the majority of whom (76 per cent) were *quetchua*-speaking Amerindians. To this day, there are some 60,000 people recorded as "internally displaced" as a result of the conflict. The election of Alberto Fujimori in 1990 was followed by a crackdown on the armed rebellion and a creeping suspension of civil liberties, along with human rights violations. The population at first tolerated, where it did not welcome, "strong", that is, authoritarian government, and Fujimori's palace coup of 1992 elicited little internal opposition. The initially popular government pursued a policy of clientelistic incorporation of some sectors of the population, including civil society organizations that came increasingly under the patronage of the state. However, Fujimori's appeal dimmed by the latter part of the 1990s, and as his administration became embroiled in large-scale corruption and election rigging, the growing strength of pro-democracy forces was able to show itself in demands for his resignation. These succeeded, after initial resistance, in the closing months of 2000, when Fujimori fled to exile in Japan.<sup>84</sup>

The post-Fujimori governments of Valentín Paniagua (November 2000–July 2001) and Alejandro Toledo (July 2001–July 2006) defined the "struggle against poverty" as a central objective, recognizing the need to reform social investment to overcome overcentralized, assistentialist and clientelist forms of provision. In rhetoric, at least, the new policies promised to address the "problems of social disarticulation" and to be "attentive to the rights of the poor to participate in decisions that affect their futures" (Government of Peru 2003:6). A clear ideological move in the direction of the NSP was signalled in the widespread view among policy makers that assistentialism must end and approaches to poverty must be designed to develop the capacities of the poor.<sup>85</sup>

Despite these intentions, poverty relief in Peru remained dogged by governmental and political lack of will, an absence of technically qualified administrative staff capable of designing and managing social programmes efficiently, little coordination between projects and ministries, and poor coverage (Blondet 2005). In contrast to Chile and Mexico, Peru has a weak state characterized by poor administration and reach. A ministerial report of 2003 noted major problems with state antipoverty efforts ranging from the dispersion and fragmentation of programmes that lacked overall coordination, overcentralized and poorly conceptualized provision that neglected distant communities, little participation of local governments, the prevalence in poverty relief of assistentialist policies, a failure to follow up and evaluate

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<sup>82</sup> See the UNDP *Human Development Report 2003* at [hdr.undp.org/reports/global/2003](http://hdr.undp.org/reports/global/2003).

<sup>83</sup> An estimated 45 per cent of households in Peru are considered "indigenous", defined as having heads of household or spouses whose mother tongue is indigenous or who identify themselves as being of indigenous descent (Blondet 2005:10). See also Herrera (2004).

<sup>84</sup> For a full account of the relationship between the women's movements and the Fujimori administration, see Blondet (2002).

<sup>85</sup> Government statements and author's interviews confirm this trend.

programmes and a continuing tendency to clientelism on the part of power holders, be these political or bureaucratic entities.<sup>86</sup>

The People's Canteens or Comedores Populares<sup>87</sup> were an early response to this insufficiency of provision and have long constituted an important component of Peru's safety net. Essentially a food distribution programme serving poor urban neighbourhoods, the evolution and function of the Comedores raises some interesting questions about female empowerment and the role of the state in antipoverty programmes. The Comedores were originally organized by women on a voluntary cooperative basis to provide cooked food at affordable prices to low-income communities.<sup>88</sup> They rapidly expanded in number with the deepening crisis of the Peruvian economy in the 1980s to become a vital artery in the food distribution programme coordinated by the state and supported by international agencies. Part emergency food programme, part self-help initiative, the Comedores were initially closer in spirit to the earlier philanthropic or mutual aid forms of poverty relief than to the kind of programme represented by Oportunidades. Food distribution programmes are today generally considered only in conditions of emergency relief, as short-term remedies. They are not intended to be sustainable or particularly participatory, they are not generally based on contractualist ideas (*pace* food for work programmes), and hence they tend to assume "passive beneficiaries". The Comedores have been criticized in Peru for sharing many of these features, and for being assistentialist, yet, from a gender perspective, this initiative reveals some qualitative benefits for those involved, measured in terms of equality criteria and broader social impact.

It is important in considering the Comedores to recognize their origins as both a cooperative and a collective response to what Pearson (1997:671) has termed in another context "a crisis in reproduction", in this case one that was occasioned by the severe hardship and poverty of the inflation and adjustment years. The common description of the Comedores in Peruvian analyses as constituting a form of social movement is not inaccurate. In the later 1980s and for much of the 1990s, tens of thousands of women, many already active in popular women's organizations, mobilized in an effort to secure collective consumption in the face of scarcity.

### Box 3: Mothers' clubs

At first we were a sort of women's club. For example we taught the *señoras* to read and write, we did literacy work. Then we saw the needs of our *pueblos*, for example, myself and others left very early in the morning to work at (the market). ... We left our children at 5am and only returned at 1pm to cook for them. ... In one of our meetings an idea was raised by one of our members who had seen a *comedor* in another neighbourhood. We thought why don't we start one ourselves? (Schönwälder 2002:158).

The origins of the Comedores are disputed, but they became a significant movement in the late 1970s on the initiative of mothers' clubs and neighbourhood women's groups in rural and urban low-income settlements. Some evolved from *ollas comunes* (literally common cooking pots, precursors of the Comedores) that had been in existence a decade earlier; others grew out of women's "pots and pans" protests at the price of food that spurred participants to establish Comedores in their neighbourhoods. The Catholic Church and associated NGOs played a central role in this process since through its existing support of mothers' clubs and *ollas communes* it encouraged the spread of Comedores and helped to organize a food distribution programme to participating organizations—on the condition that the food was prepared through collective cooking. In the 1980s, as the economic crisis hit Peru, rising unemployment, up to 7,000 per cent inflation, and little other income-generating work available, women in poor communities in Lima looked for ways to contribute to household survival. The Comedores rapidly acquired recognition as an effective way to reach low-income populations, benefiting from NGO support and from a food distribution programme financed by the United States

<sup>86</sup> See Portocarrero et al. (2000) and Government of Peru (2003).

<sup>87</sup> "Kitchens" is the more accurate description as these were not usually eating places; people collected the cooked food to take home.

<sup>88</sup> For a full account, see Lora (1996); see also Barrig's (1988, 1994, 2003) and Blondet's (1995, 2002, 2005) analyses.

Agency for International Development, then donating agricultural surpluses for social protection during the adjustment process. In the context of hyperinflation and extreme precariousness, the *comedores* were virtually the only safety net available to the poor (Portocarrero et al. 2000).

Each *comedor* involved a group of up to 30 women members (*socias*) taking turns to prepare food for sale in the neighbourhood on a not-for-profit basis; in return, the cooks were entitled to an agreed number of rations (usually five each), for their own use. A *comedor* typically produced between 60 and 120 meals a day. For the women running the service, the imperative was principally household survival, but as they evolved a feminist policy logic was defined to justify the programme. As summed up in one evaluation of the Comedores: the service saved the time of the women in the community that would otherwise be spent cooking, this enabled them to go out to work; those engaged in running the project gained leadership and management skills and the *socias* were able to overcome their domestic isolation through participating in the work of the programme (Vidal 1985).

In the first half of the 1980s, the Comedores grew rapidly in number with as many as 100,000 women participating in 7,220 committees reaching one million beneficiaries in metropolitan Lima alone (Vidal 1985). According to estimates, every day they prepared 480,000 rations of food to feed 6 per cent of the total (official) population of Lima (eight million) generating \$116,000 each day, (25 per cent of which came from state subsidy), amounting to \$30 million a year.

A study carried out in 1995 showed that the 24,018 mothers' clubs, 42,447 Glass of Milk committees<sup>89</sup> and the 9,869 Comedores between them brought together 1,526,676 women, who worked almost 285 million hours of voluntary labour in a year, which was the equivalent of 154,683 persons working full time, making up almost 4 per cent of the economically active population in services (Cueva Beteta and Millán Falconi 2000). The Glass of Milk programme alone was calculated for one community (Villa El Salvador) where the volunteers contributed an estimated 733,432 hours a year in the form of free labour. If calculated on the basis of the legal minimum wage, this work represented 23 per cent of the municipal budget assigned for this programme in 2001 and almost 8 per cent of the total budget assigned for the same year (Andia and Beltran 2003).

In the 1980s and 1990s, international, NGO and governmental aid to the popular women's organizations provided opportunities to develop the capabilities of the members and their clients. Through the collaborative efforts of feminist and other NGOs, the Comedores extended the scope of their activities in their communities. *Promotoras* working with NGOs as popular educators and programme assistants gave courses in training, leadership, education and basic health and provided legal advice and workshops on domestic violence. Courses in leadership strengthened and widened the social base of the movement; through discussion and debate with feminist NGOs, the women leaders of the Comedores, sometimes accused of *caudillismo*, gradually began to learn more democratic styles of working. They also generated their own commission (Comisión Nacional de Comedores) and a federation (La Federación de Mujeres Organizadas en Centrales de Comedores Populares Autogestionarios y afines de Lima Metropolitana/FEMOCCPAALC), which became involved in negotiating with the government over conditions and took part in public policy debates. They also helped to ensure that some capacity building and health education was incorporated into the Comedores programme at the national level. As Blondet (2002:20) explained, through this process, "(the women) lost their fear of government officials and bureaucrats, they entered public life, they mixed with international actors, attended international conferences".

However, the success of the Comedores had attracted government interest not just as a low-cost scheme to reach those in need, but also as a way to garner votes. Some of the leaders became

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<sup>89</sup> In 1983, a parallel Glass of Milk scheme for poor children was launched under the management of local women's groups.

powerful political forces capable of mobilizing a sizable sector of the population. First, president Fernando Belaúnde Terry (1980–1985) took advantage of food aid to strengthen his network of political clients. His wife took the traditional mothers' clubs under her wing, and inaugurated the so-called Violeta's Kitchens, inspired by the success of the Comedores. Alan García's APRA government (1985–1990), which presided over a catastrophic inflationary spiral, continued his predecessor's policy of clientelistic absorption of women's organizations in his poverty relief programme, which supported mother's clubs with three elements – Comedores, workshops and basic education centres. Existing Comedores were invited to place themselves under state regulation, which divided and marginalized independent Comedores until the unfolding economic crisis gave them the opportunity to press their case for recognition and economic support. In the 1990s, Comedores also attracted the attention of Sendero Luminoso, which launched a campaign of terror against them, killing, among others, the much loved and respected community leader María Elena Moyano in 1992 (Tupac 2000).

It was, however, with Fujimori's advent to power in 1990, that the Comedores became even more closely tied to the state. After the imposition of a harsh adjustment package known as the Fuji-shock, a social emergency plan was built on the basis of the women's organizations. A national food assistance programme (Programa Nacional de Asistencia Alimentaria/PRONAA) was set up in 1992 to promote food security among those most afflicted by the adjustment programme. The Comedores were taken under PRONAA's wing, giving them legal recognition and charging them with overseeing food distribution for poverty alleviation. The agreement allowed the state to regulate the hitherto semi-autonomous Comedores, partially subsidizing them through food supplies such as beans and oil. Throughout this process the number of Comedores expanded in response to the growing number of poor, which rose from 7.5 million to 12 million in the course of 1990 alone. In this process, the Comedores gained in importance and in public profile, but they also lost their autonomy, becoming increasingly identified with the president, turning out in force at rallies and duly delivering votes from the communities they served.

As Fujimori's popularity waned, criticisms were raised against the political colonization of the Comedores by the government, along with questions about their efficiency and function. Feminist analysts who previously supported the movement as a popular initiative now considered that the Comedores had been placed too squarely at the service of the state, while for their part, government agencies were principally concerned with their cost efficiency. Research showed that they primarily served urban populations and were largely concentrated in the capital, Lima, and in areas where poverty was not deepest. Indeed, their provision was not even reaching the poorest in the urban communities that they principally served. In other words, their primary rationale to be serving the poorest was not proven, yet they were still benefiting from government subsidies. After the fall of Fujimori's government in 2000 the Comedores underwent a policy reassessment with a view to making them more politically and financially independent of the state. PRONAA officials were given training to make them aware of the dangers of succumbing to the temptations of clientelism, and such practices became punishable. Proposals to reduce the Comedores's dependency on the state and to change the expectations of their leaders were drafted and debated. These included placing them on a microenterprise basis with cash subsidies/soft loans instead of food aid with a view to eventually making them self-sufficient, and providing money incentives to boost the uptake of the service among the very needy. However, these attempts to reform the existing arrangements met with strong resistance by the leaders and their organizations, which claimed that they have a *right* to state subsidies that they would defend. As Blondet (2002) observed, in taking this militant stance they had come full circle, from being essential to the government programme to now hindering its further development. Meanwhile, trust within the Comedores themselves, and between them and their client groups, suffered.<sup>90</sup>

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<sup>90</sup> One lesson here is that states must tread carefully when they work with popular organizations if they are not to undermine or, worse, destroy their legitimacy and effectiveness.

Despite these concerns over the Comedores, few initiatives were taken during the years of the Toledo government to change their modus operandi. They were too well organized to brook much interference, and they were better than nothing while state support remained deficient. The Toledo government ended its period of rule in 2006 amidst criticism for its failure to meet the election promises it made in regard to addressing the social deficit. Although growth rates rapidly improved after 2004, the 3.5 million jobs that were to be created did not materialize, and unemployment, which had risen from 8 per cent to 10 per cent over the years of his administration only slowly started to fall. Little was done to meet the goal of “ending the legacy of assistentialism” by incorporating new ideas based on the development of capacities and rights, and the creation of opportunities for poor families. The government’s food distribution programme with its 20 programmes did manage to serve 10 million Peruvians a year but, significantly, failed to make any real dent on the depth of poverty or on nutrition levels (Vazquez and Ruesco 2000:91; Portocarrero et al. 2000). Peru has started a cash transfer programme (Juntos) modelled on Oportunidades. It remains to be seen how this develops and what the return to government of Alan García’s party will do to address this state of affairs, but poverty relief will remain a high priority.<sup>91</sup>

### ***Female altruism at the service of the state?***

These two examples of antipoverty programmes raise some important questions for gender analysis. As noted earlier, 40 years of research and activism on gender issues has suggested criteria that help in determining whether a given programme has the potential to bring about change in the direction of securing greater equality between the sexes. Such change is normally understood to occur through processes that empower women and enhance their capabilities in ways that enable them to challenge relations of inequality and subordination. On this basis, six criteria can be identified that will help to inform the discussion that follows of the Oportunidades and Comedores programmes:

1. equality principles built into the design of the programme;
2. social and economic empowerment of women being an explicit goal with definable impacts;
3. training and resources allocated to enhance women’s capabilities with a view to securing economic independence and well-being (health, both mental and physical, freedom from violence);
4. family friendly policies – acknowledge caregiving, childcare arrangements, time management;
5. transforming gender relations central to the programme, including involving men in ways that help to secure one or more of the above objectives; and
6. participants have voice in programme aims, design, evaluation and management.

In examining the two programmes with these criteria in mind, it is apparent that there are both striking similarities and differences in the history and management of the programmes. While both identified unmet needs within poor households and communities and are providing vital support to children, attending to the needs of the women (the mothers) who are central to the functioning of the programmes is not the main, or even an explicit, aim of either project, any more than is gender equality a consistently observed objective. The social construction of need here is child centred and, as we shall see, strongly normative and gendered as is the organization of the programmes. Both projects incorporate women but depend on maintaining the gender divide for their success. Thus, even as they might empower women *within these structures*, the programmes, in effect, reinforce the social divisions through which gender asymmetries are reproduced. In the first place, they depend upon women fulfilling their “traditional” social roles and responsibilities. Oportunidades does so by basing its programme

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<sup>91</sup> Some streamlining and amalgamation of the multitude of programmes is also envisaged, and a cash transfer programme along the lines of Oportunidades is to be expanded.

on ascribed maternal responsibilities, in effect making transfers conditional on “good motherhood”; the Comedores do so by basing their distributive efforts on women’s domestic labour and food preparation skills. Neither programme incorporates men in any serious way, and no effort is made to promote the principle that men and women might share responsibility for meeting project goals and for children’s welfare. The programmes unambiguously rest on normative assumptions concerning “women’s roles” so that the work that women undertake, whether cooking or ensuring that children’s needs are met, is taken for granted as something that mothers “do” (Bradshaw and Quirós 2003:11). The social relations of reproduction, therefore, remain unproblematized, and the work performed is easily naturalized as it remains outside the paid economy (Comedores) or is seen as contributing to the household’s needs (Oportunidades).

Latin American cultural constructions of femininity are strongly identified with motherhood, and serving the needs of children and household is generally considered a primary maternal responsibility, whether discharged by mothers themselves or delegated under their supervision to paid employees or other family members. Throughout the modern history of Latin America, motherhood has been associated with political or civic activism, so strongly identified is it with moral virtue, altruism and self-sacrifice (Jelin 1990). Those who ran the Comedores tended to explain their original commitment to the work in terms of maternal identifications—“helping their children” emerges time and again in the testimonies of members as the reason they became involved. It is assumed by programme managers and participants alike that any actions that improve the well-being of children are not, as Bradshaw and Quirós (2003:11) expressed it, a “burden” for women, and any “costs” they bear are “simply part of the mothering role”. The Mexican programme indeed seeks even greater commitment from mothers through the regulation of their domestic responsibilities, situating them as the managers of their families’ needs. While this has positive aspects in that it involves some status reordering in the family in favour of women, the traditional division of labour is reinforced and women’s responsibilities are increased.

Since cultural constructions of femininity are closely bound up with an affective investment in a self-sacrificing or altruistic motherhood, the ideological site for contesting the demands of maternalist programmes is not one that is easily occupied. Single and working mothers are particularly vulnerable to being overloaded by programme demands. As Bradshaw and Quirós (2003:12) noted, those inscribed in programmes such as Oportunidades who miss a clinic appointment or a workshop, or send a relative instead, lay themselves open to the charge of being “bad mothers” who do not care for their children. By the same token, men who may wish to care for their children are given no role to play, and in an already intensely *machista* culture are liable to being denigrated as “odd” and “feminine” for so doing. Most Mexican’s live in nuclear households, but in areas of high male out-migration, female-headed households are on the rise. Whether by circumstance or design, marginalizing men from parental responsibilities is not in their overall interests any more than it is in their wives’ or their children’s. With regard to the latter, it is noteworthy that the Children’s Rights Convention expressly states that children should be cared for by both parents, and child welfare, particularly that of boys, is now understood to be enhanced by fathers’ involvement in caring. The programme’s support for maternalist models of care is, therefore, questionable on a number of grounds.

As noted earlier, the programme’s concern with regulating the conduct of motherhood is less a new modality, quintessentially characteristic of neoliberal governance, than a reaffirmation of older conservative catholic values that, from the 1920s, aligned with social policy through the “social hygiene” movements mentioned earlier. While much is said about the “individuation of the social” in regard to neoliberal policies, this does not apply to the women in these programmes, who are less “individuated” than bound ever more securely to the family. A high degree of continuity through institutional and public cultures is, therefore, evident in this area of Latin American social policy. If there is a new element beyond the purely technical administration of the project, it is that which is introduced by some (albeit limited) sensitivity on the part of the designers to issues of gender equality, at least in the case of girl children, if

less so in the case of their mothers. One must conclude that while gender equity considerations had some influence in the design of these programmes in recent years, sometimes as a result of feminist advocacy through NGOs, sometimes as a result of the shift in public and professional attitudes occasioned by the spread of feminist ideas, these have done little to ensure the mothers a sustainable route out of poverty.<sup>92</sup>

If challenging Latin America's maternalist culture is a difficult field of engagement, so too is that of transforming gender relations in ways that allow women more autonomy. Women's participation in a poverty alleviation programme can in itself help to loosen male control over their lives, allowing them entry to public spaces and activities to which they may not have had access before. Woman-focused programmes can also enhance women's self-confidence and create solidaristic ties among participants. But, as noted earlier, they can also generate tensions between men and women at the household and community levels, whether around the implications of women's increased autonomy and presence in the public sphere, men's resentment at being displaced as provider or their envy of what they see as women's privileged access to project resources.<sup>93</sup> To repeat, if men are considered as having something positive to contribute to the programme and to their families, they can be involved in ways that break down dysfunctional sex typing and power relations. Households can be encouraged to adopt more dynamic, cooperative principles in regard to care rather than rely on the almost exclusive responsibilities of mothers.

Having said this, while both programmes could have benefited from a greater attention to gender analysis, this is not to say that they lack "gender awareness". On the contrary, the Comedores were entirely managed by women, and, as noted, the Mexican programme was gender sensitive in providing extra support for girls' education and in targeting mothers to receive cash handouts and engage in programme activities. While cash handouts paid directly to mothers undoubtedly have some positive benefits, they do not *necessarily* alter male/female inequities in expenditure on personal consumption and can even serve to protect men's personal income and expenditure<sup>94</sup> (Chant 2007).

For all the talk of female empowerment, it remains the case that the women in both programmes are primarily positioned as a means to secure programme objectives; they are a *conduit of policy* in the sense that resources channelled through them are expected to translate into greater improvements in the well-being of children and the family as a whole. Such benefits as are derived by the mothers themselves as a result of participation in the programme are a by-product of servicing the needs of others. Women's position within the social division of labour is not only reinforced by confirming their customary caregiving roles, but the programmes depend to a significant degree upon their carrying out this work without any direct financial compensation for their time and, indeed, exist in tension with any income-generating activities that they may undertake.

These somewhat instrumentalist features of the programmes are compounded by the fact that there is little in their design that advances women's economic autonomy or security. Most poor, rural and indigenous women have low literacy levels, and their skills are poorly rewarded. Training for the job market is limited or non-existent, and there is scant, if any, childcare provision for those women who want or need it because they work, train or study. Such women need an income, and are more often than not involved in income-generating activities that, while precarious, may leave them without much disposable time or flexibility (Espinosa 2006).

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<sup>92</sup> In the case of the Comedores, tackling gender relations was, it seems, only added to the programmes as a result of the work of feminist organizations and NGOs, but neither programme appears to have considered how transforming gender relations might be made more integral to broader policy design.

<sup>93</sup> Adato et al. (2000) stated that women did complain that men were left out of the health workshops, and I observed similar attitudes during field visits in July 2005.

<sup>94</sup> Again, as a result of recommendations of an external evaluation, Oportunidades has set up two savings funds for programme members: one for young people and the other with a popular bank, which has attracted savings from women that are channelled eventually into house improvements or small enterprises. If women can save productively this would help allay their structural vulnerability, but this proposition needs long-term monitoring if it is to be sustained.

Some antipoverty programmes have failed because already overloaded women simply cannot fulfil programme expectations if no account is taken of the fact that they have income-generating and childcare responsibilities to meet as well as performing most of the domestic chores.<sup>95</sup> Indeed, while rarely acknowledged in the case of women, participation in antipoverty programmes can have *negative* consequences in incurring opportunity costs by preventing or restricting women's freedom to engage in paid work (Bradshaw and Linneker 2003). In the Oportunidades programme, the assumption that mothers were available to carry out "their" stipulated duties in respect of their children takes no account of the fact that there was, in the words of one evaluation, an "increasing dependency" on women's earnings even though these were often meagre (Escobar Latapí and González de la Rocha 2004:66). Many female-headed households were also, of necessity, in some form of income-generating work that made a significant contribution to their household economy (Escobar Latapí and González de la Rocha 2004:66) The same evaluation concludes that "Oportunidades...requires a major allocation of time from the women...there were cases of women who could not carry on with their paid employment on account of the demands of the programme". Their multiple responsibilities, including those required by community membership, were "incompatible".

Indeed, for poor women and their households, it is arguable that greater attention to income generation is essential. ECLAC echoed some of these concerns:

Considering that the poorest women have greater difficulty in finding work, but that when they do they contribute significantly to family income, there is clearly a need for policies to increase the quantity and quality of jobs available to women. Women's employment has a major impact on the income of poor households, and female participation is lower in these households than in higher income ones, and they have a larger number of dependants; there is a legitimate place for policies to train women from poor households and make them more employable and for schemes to increase their incomes (2000:8).

This is not to deny that many women might choose not to work and might not perceive the programme's demands as anything other than helpful in relieving some of the pressure on them to obtain paid work—especially if little is available to them. However, given the importance of women's lifelong economic precariousness and their need to secure cash incomes, the relative lack of attention to this issue is striking.<sup>96</sup> The pilot project undertaken by the Inter-American Development Bank referred to earlier, which aimed to help women in the programme to engage in productive activity, would, if approved as general policy, signal a welcome awareness of this shortcoming.

### ***Voluntary labour: The question of reward***

As we have noted, antipoverty programmes such as those considered here depend to a significant degree on women's voluntary labour. The fact of women's gains from such activity conceals a number of important issues. Women are typically expected to give their time to antipoverty programmes without remuneration, but attitudes toward voluntary labour vary from programme to programme, and the reasons why they do deserve serious consideration. In Oportunidades, as we have seen, there was evidence of some resentment from women at being asked to take on additional unpaid tasks. Some women's groups too, have voiced concern that these programmes are a means of "making women administer poverty" by instrumentalizing their labour and time.

It is worth re-posing the question of what women gain *on their own account* in return for participating in these programmes, since it cannot be reliably assumed that they are driven either by altruism or by sheer necessity alone. Put differently, is the main reward the

<sup>95</sup> See, for example, Gideon (2002) on Chile and Bradshaw (2002) on Nicaragua.

<sup>96</sup> This is clearly an area that needs more empirical research. There is also the issue of the unintended consequences of tying stipends to children. Research undertaken in Nicaragua in 2004–2005 explored the tendency of women in these programmes to develop such a dependency on the "incomes" that they ended up having more children in order to prolong the receipt of the stipend.

satisfaction afforded by the social and emotional dimensions of motherhood or are there other ways in which participants benefit from programme membership?<sup>97</sup> Here it is useful to reflect on the differences between the Comedores and the Mexican programme. The Comedores did not have any finely tuned targeting process, and receipt of government support depended on whether recipients were located in areas where the fourth and fifth income quintiles are found. The labour contribution to most of the programmes was voluntary; members were subject to cooperative as well as some state regulation, the latter in the form of health and bookkeeping inspections, reports and occasional surveys. The women contributed their labour and domestic skills, for which they received a small reward in kind. The programme, therefore, did not provide its members with economic assets or with much in the way of long-term security. The state, as we saw, drew significant benefits from these self-managed food programmes and the Comedores leaders were well aware of this fact. From their vantage point, there were some positive features of the programme: the members of the Comedores were able to exercise a significant degree of self-management; domestic work (that is, cooking) was shared and socialized, and in the process community ties were forged; some members secured experience in management and public speaking and enjoyed a measure of empowerment understood as enhanced status, capacities, and influence over their lives.

Gender equity criteria are essential for illuminating the ways in which women may be disadvantaged and their subordination reinforced. But by shifting the focus from a deficit-based to an asset-based approach to gender analysis, the returns to women participating in these programmes can be better understood. In the Comedores, economic empowerment for the members was not an outcome or aim of the programme; any material rewards were probably outweighed by the free labour and time invested in the cooking and maintenance of the service. The Comedores, nevertheless, retained the support and commitment of the members over a significant period of time. Why? Female altruism may well have played its part, but the rewards of participating in the Comedores scheme in the form of social empowerment and self-esteem were likely to be more significant.

These features of the Comedores were not present or were weakly represented in the Mexican programme and, along with their distinctive history, have been widely debated. Their origins in women's protest movements and their character as a community project allowed civil society theorists to claim them variously as "schools of citizenship", a gendered form of civic engagement or, as some have suggested, a form of "civic maternalism".<sup>98</sup> It has been argued that the activities of the Comedores, especially in the first decade, contributed to local social capital and enhanced associational life. For the women involved, participation in the organization was the way in which they became subjects of rights and obligations (Blondet 1995). What is widely accepted is that as a self-managed cooperative enterprise, the Comedores tended to foster skills and confidence among their members, and their origins within a women's movement gave those involved a sense of purpose and recognition for their social function within the community. Although women were still carrying out domestic skills in preparing and cooking food, this work was socialized, and indeed was to some degree dignified by being placed at the service of the community. The fact that the kitchens were run on a voluntary basis according to criteria that were not simply imposed from above helped give the enterprise a sense of collective ownership, *pace* the emergence over time of overly dominant personalities.

A common criticism of state-run antipoverty programmes is that those involved feel stigmatized through qualifying as "poor" rather than having rights as citizens, and are then liable to suffer accusations of "welfare dependency" (Graham 1991:2). In the Comedores project, the cooperative nature of the enterprise produced the opposite effect. Members typically had high self-esteem, and enjoyed respect and recognition for offering a public service to those in need. The "needy" were of course also the members themselves, such that the social distance

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<sup>97</sup> There is interesting research being carried out as part of the well-being programme at the University of Bath. See Copestake (2006) for findings in relation to the Vaso de Leche programme in Peru.

<sup>98</sup> See Jelin (1990) for discussions of Latin American maternalism.

between providers and “the needy” was minimal in contrast to classic philanthropy. More generally, as research has shown, self-identification with being in a state of poverty is commonly associated with humiliation and lack of respect (Narayan et al. 2000). Voluntary self-managed community programmes have a better chance of reducing these stigma effects of poverty. They also have some greater scope, given the collective nature of the work, to develop reciprocal exchange networks in the neighbourhood over needs for childcare and credit, and to develop a sense of collective and social need. The Comedores, as a community-based scheme which drew in members from the locality, was used by women as a social space that strengthened social solidarity and also enabled members to become part of wider networks and public spaces. In the Mexican programme, there was also some evidence, though less than the Comedores, of incipient networking; one study found that some members of the Oportunidades programme reported satisfaction in developing relations among themselves, and forging a new social identity as “Oportunidades women”.<sup>99</sup> It is not clear, however, how widespread or enduring this was. Nor is it known to what extent the programme sought to foster women’s social capital or to overcome the stigma of receiving a stipend.<sup>100</sup>

The contrast with Oportunidades is, therefore, noteworthy. The Mexican programme originated as a state-managed poverty relief programme that, as is increasingly common, targeted beneficiaries on the basis of means-testing. Even when the programme extended its reach to “near universal” coverage in selected regions, women were incorporated into the programme on an individual basis with no clearly defined collective or societal project with which to identify beyond a rhetorical invocation of “citizenship” and their shared roles as mothers.<sup>101</sup> Self-esteem was therefore largely bound up with being a good mother, a construct defined according to certain norms that may, or may not, be those of the participating group, and may be difficult to live up to. In programmes that make benefits conditional on being a good mother, self-esteem can be difficult to sustain. Non-compliance with the demands of the programme, including for voluntary labour, could mean a loss, not only of the financial incentives, but also of the opportunity for a child or children to receive schooling. If women are unable or are not prepared to assume these responsibilities as directed by the programme they are liable to suffer stigma. Moreover, what constitutes “good mothering” is clearly at issue and there may be significant attitudinal differences between urban and rural, indigenous and non-indigenous populations as to what this involves, for example, with regard to the value for children of work, and the role of kin other than mothers in daily care.

If these are some of the issues that are highlighted by these programmes, another is surely that states must work harder to establish optimal relationships with poor communities and with the women they work with. Clientelism of the kind practised by successive governments in Peru and formerly in Mexico is counter-productive, although the Oportunidades programme seems to have made progress in curbing this trend. The history of the Comedores shows that many of their positive aspects and their legitimacy withered with their manipulation by governments and their absorption into PRONAA. The public presence and the access of its leaders to the political elite in time discredited the Comedores movement, even as it gave the leaders a public profile and wider sense of purpose. On the other hand, state programmes must also recognize the value of cooperation and solidarity, and should seek to foster and create associational values where possible, rather than put them at risk through poor project design. Getting the balance right between participation and exploitation is surely one of the most difficult challenge facing antipoverty programmes, and in the next section we return to some of the broader implications of antipoverty programmes.

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<sup>99</sup> Observations made while on field visits showed women to be grateful to the programme for the stipend, and seemed to welcome the visits every two months to collect them as a way to get out of the house, carry out marketing activities and socialize (author’s field notes, July 2005).

<sup>100</sup> Adato et al. (2000) found this to be the case, but more research is needed to confirm that this was a result of the programme and not due to other or aggravating factors.

<sup>101</sup> The exception may be the detaching of political allegiance from clientelistic patronage; in the elections of 2006 women in the programme were invited to help develop this aspect of their civic engagement by reporting abuses and encouraging electoral participation.

## Concluding Observations

It is evident from these two contrasting cases that while both position women within communities as service providers or caregivers, as antipoverty programmes they operate with different logics and appear to deliver different experiences to their participants. They are both state programmes albeit with different forms of regulation, and both attempt to build or sustain forms of social self-reliance. They illustrate the point that social relations *and* the state remain of critical importance in securing the welfare of low-income populations. Normative gender relations, maternal identities and ideologies are essential to the functioning of such programmes. However, the newer “contractualized” programmes are designed to secure greater regulation of women’s socially ascribed maternal responsibilities as a means of combating the intergenerational transmission of poverty.

These cases show that women have much to contribute to antipoverty programmes. Their gendered assets, dispositions and skills, their inclination toward involvement in household survival and at the community level and their precarious relationship to the wage economy all help to make them appear a peculiarly suitable ally of antipoverty programmes. This is not least because they also represent an army of voluntary labour, and can serve as potential generators or guardians of social capital. This “suitability” can be understood as arising from the positive and negative aspects of the gendered relations of poverty. If poverty is a multidimensional condition involving deprivation and exclusion, then—on the basis of indicators such as those developed in the capabilities approach—women, lacking assets and with fewer capabilities, might be considered to be more subject to deprivation and exclusion than men. Yet, if this is often so, well-being is not only a question of material goods, but also involves self-respect, dignity, belonging and participation and it may be the case that some disadvantaged women might have more access to forms of social inclusion and well-being than men in similar material circumstances. Women are vulnerable economically, chiefly because their labour market situation is precarious, low paid and interrupted by periods of childbearing and the demands of caregiving. They often lead lives that are busy, engaged as they are in the informal and care economies, both private and public, typically performing unpaid or poorly paid work. Yet, they can and typically do gain satisfaction, self-esteem, recognition and respect from their motherhood role and from the activities that constitute a kind of “informal citizenship”, which as in the case of the Comedores, takes their domestic activities from the isolation of the family to public spaces, with some (albeit variable) development of their capacities.

These gendered dispositions are being increasingly recognized by the international development agencies, but so far this has not brought significant material benefits to the women involved. The costs many women bear through juggling these multiple responsibilities in terms of weak labour market links, lack of support for carework and long-term insecurity are rarely taken into account. Prevailing policy assumptions still tend to naturalize women’s “roles” and seek to make use of them and to influence how they are developed and managed subjectively and situationally. Poverty relief is still treated all too often as a matter of an unproblematic social need, abstracted from the social relations that produce it (among which gender relations are critically important). The classic assistentialist programmes that targeted women and children as high risk and in poverty were based on this view, and were commonly associated with paternalist notions of care and charity. They made little, if any, attempt to address the conditions that placed their beneficiaries in these circumstances and concentrated on short-term relief typically delivered in the form of food aid and primary health care (Jackson 1998). The ideas of the NSP try to go beyond this through participation, gender awareness, capacity building and by “responsibilizing” the poor, yet, in practice, programmes still rely on outdated conceptions of women’s social roles that take little account of their differentiated needs or the risks they face. In effect, Oportunidades creates a dependency on a subsidy that confirms mothering as women’s primary social role as a way to secure programme goals. Programmes that give money or food to those in “vulnerable” positions and fail to strengthen households’ assets (or labour market access) do little to reduce vulnerability (Bradshaw and Quirós 2003). If women are to be provided with an opportunity for redefining the terms of their inclusion in

their societies and in their polities, then the unequally valued forms of social participation for men and women that are inscribed within the public and private spheres and pervade the organization of carework, the public sphere, paid work and public institutional life need to be challenged rather than deepened. The radical challenge to social policy from an equality perspective is to de-ontologize “women’s roles” and to help reconstruct gender relations in both the domestic and public spheres. Applied to these programmes this would imply “dematernalizing” them and encouraging cooperative, egalitarian models of household responsibility on the basis of individuated as well as household needs. At present, instead, these programmes retraditionalize the family, marginalize men from domestic and childcare responsibilities and, as Chant suggests in a particularly apposite phrase, “feminize the responsibility for poverty” (Chant 2006, forthcoming, 2007).

Women’s neighbourhood organizations such as the Comedores or mothers’ clubs have considerable potential for transforming some of the negative features of antipoverty programmes. However, as we have seen, they risk being clientelized and co-opted into performing free labour for states for little in return and with scant thought for their medium- to long-term needs. Women’s voluntary contribution to health and education programmes has made a vital contribution to welfare programmes, but it is not surprising that women’s groups fear that they are being exploited and their contribution taken for granted.

This growing concern is understandable where states are indeed abdicating their responsibilities and “dumping” them on women. Yet, many states lack the capacity to implement the alternative solutions offered—universal transfer systems and properly remunerated employment for the poor. Such policies may be desirable goals to aim for, but in low-income countries they have little chance of being realized at least in the short term. Moreover, the call for more state action and responsibility needs problematizing. What kind of state and what kind of involvement by states in community provision is desirable? The question arises as to whether more state involvement in poverty relief is desirable if states themselves remain male dominated with little capacity or interest in advancing programmes that offer genuine help to women. Equally, devolution to local communities of such responsibilities without adequate resources or female representation in decision making offers no guarantee of solutions—woman friendly or otherwise.

These are key dilemmas of our times, and yet they rarely receive the analytic attention they deserve. While there is widespread agreement in the policy community that state involvement of some form is necessary for coordination, “facilitation”, oversight and regulation, less attention is devoted to how states can both be constrained and balanced by democratic and gender-sensitive procedures—while at the same time meeting efficiency criteria. How can such ideas be brought into alignment with the consensus that social protection programmes can and should involve communities and citizens in their design and administration, and how can women be guaranteed a say in that process? These are some of the issues that need to be integrated more fully into current debates on social security.

For women in poverty, current programmes appear to offer both risks and opportunities. But such participation is always conditional on the participant’s subjective evaluation of the merits of the project, and on the gains, individual and collective, that it brings. Those involved in voluntary work may be happy to give their time and effort, but they still need projects that enhance their capabilities through education or training, providing links to employment, advancing credit for successful projects that enable them to acquire their own assets. Above all, they need a reliable and autonomous income source. González de la Rocha (2001) has argued that the emphasis on the non-monetized resources of the poor in much recent development policy thinking has led to a neglect of the needs of populations in poverty for a money income. In policy terms, this has had serious consequences since the failure to attend sufficiently to wages and incomes means that the basic condition for engaging in other activities is itself closed off. As the case of poor women amply demonstrates, social policy in Latin America has been inconsistent in the ways that it has defined some categories of risk as legitimate and urgent, but

has ignored others. In sum, given that the market capacities of women are already weak and household survival is precarious, both can be further undermined through presumptions of “natural” dispositions as mothers and caregivers. Women and households need *sustainable* routes out of poverty, ones that are at the same time more realistic and imaginative than the maternalist options that are currently on offer.

The NSP is still in the process of development in Latin America. However contested its underlying rationale may be, and however much it is adapted to local contexts, its chances of succeeding even in its own terms are limited by three features commonly found in the region. The first of these is the scale and depth of the poverty that exists in many Latin American countries. Targeted programmes whether designed well or badly touch a fraction of the population in need. Second, even if they succeed in developing the capabilities of the poor that they do reach, will there be sustainable livelihoods available to them? If antipoverty programmes are not linked to efforts to develop local and regional economies, the expectations raised by the emphasis on participation, rights and citizenship are unlikely to be fulfilled.

Much depends upon resolving the third problem, namely the degree of trust in government. Participatory programmes, whether directed at community development or poverty relief, are widely seen as the means by which governments can exploit the free labour of the poor while at the same time claiming legitimacy through often false forms of representation, “invited participation” (Cornwall 2003). Instead of genuinely deliberative arenas, many of these forums are too often manipulated by governments to serve as “nodding shops” disposed to approve decisions already taken elsewhere. The ultimate tests of the NSP, therefore, are whether it is applied in a context where these problems are addressed and overcome and, above all, whether government economic and development policies deliver more to their citizens than they have done to date. Demands for a fairer system of redistribution have generally been considered weak because citizens have not been organized or motivated to petition for better social services; this coupled with a lack of political will on the part of governments and organized opposition to redistributive reform has allowed Latin America to maintain its ever deepening income gap and its place as the region with the greatest income inequalities in the world. In the absence of efforts to promote employment and secure livelihoods, poverty relief will remain little more than a residual approach to tackling the social crisis that grips many Latin American states.

More optimistically, if the underlying principles of the NSP serve to highlight the relationship between social inclusion, participation and citizenship and if they can provide an alternative to technocratic interventions decreed from above, they will mark some kind of advance. Positive outcomes for the poor are more likely if development is seen as a process of negotiation in which the previously disenfranchised are included. If in this process women acquire *real* “voice and presence” within these deliberations they may yet turn out to be a decisive weight in the future balance between social justice, state forms and development objectives.

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