

Mothers at the Service of the New Poverty Agenda: Progresa/Oportunidades, Mexico's Conditional Transfer Programme

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Abstract

This article considers some of the changes and continuities in social protection in Latin America through a focus on the ways in which motherhood is positioned as key to the success of the new anti-poverty programmes that have followed structural reform. It examines a flagship cash transfer programme known as Progresa/Oportunidades (Opportunities) established in Mexico in 1997 and now being widely adopted in the region. Characterized by some commentators as a quintessentially neo-liberal programme, it is argued that Oportunidades represents a novel combination of earlier maternalist social policy approaches with the conditional, co-responsibility models associated with the recent approaches to social welfare and poverty relief endorsed by international policy actors. In the first section, the gendered assumptions that have governed Latin American social policy are described; the second outlines social policy provision in Latin America and identifies the key elements of the new approaches to poverty; and the third critically examines the broader implications of the Mexican programme's selective and gendered construction of social need premised, as it is, on re-traditionalizing gendered roles and responsibilities.

Keywords

Anti-poverty programmes; Conditional cash transfers; Maternalism; Motherhood; Latin America; Progresa/Oportunidades

Introduction

In Latin America, as elsewhere in the world, gender bias and masculine prerogative have 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 have generally accorded

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with idealized assumptions about the asymmetric social positions occupied by the sexes, with male breadwinners and female mother-dependants 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.

This article considers some of the changes and continuities in social policy provision in Latin America through a focus on the ways in which women, in particular mothers, are positioned within the new anti-poverty programmes that have followed structural reform. It examines a flagship anti-poverty programme known as Oportunidades (Opportunities) established in Mexico at the end of the 1990s.¹ Seen by some commentators as a quintessentially neo-liberal programme, and embodying many of the main ideas of the 'New Poverty Agenda',² it is argued in what follows that Oportunidades represents a novel combination of earlier social policy approaches with the contractarian, 'co-responsibility' models associated with new approaches to social welfare and poverty relief. The first section outlines the gendered assumptions that have governed Latin American social welfare provision, the second provides the background context for the emergence of the new approaches to poverty; and the third subjects the Mexican programme to a gender analysis which highlights its selective construction of social need.

Social Policy in Latin America: Historical Overview

Low tax revenues and weak commitments to redistributive policies ruled out the development of effective, universal welfare systems in Latin America. Only five countries, Argentina, Uruguay, Costa Rica, Chile and Cuba³ developed a form of welfare state and, with the exception of the latter, none achieved universality of entitlement or coverage.⁴ Nonetheless, from the late nineteenth century, if to widely different degrees, some forms of social provision began to evolve. These were principally concentrated on the education and health sectors and, where Bismarckian models were influential, as in Mexico and 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 state formation.

From the first decade of the twentieth century, social rights increased as a result of successful demands by organized labour and socialist parties for social reform, with an incremental assumption of social responsibility by enterprises and governments. In the 1920s and 1930s 'improving the race' in order to secure the conditions for development and head off threats of disorder became the leitmotif of the social reform and eugenics movements (Stepan 1991). Many women were among the promoters of 'social hygiene' and its derivative, the science of *puericultura* (child development). They energetically supported policy and legal changes which were maternalist in orientation, demanding benefits and services for mothers and children. Mothers were among the first to be recognized as social policy claimants whether as married women or as 'unfortunates', that is, impoverished single mothers. However, it was often stated in the discussion of these provisions that it was

primarily in the interest of their *children* that women might receive benefits of a financial, educational or medical kind. In other words it was in the construction of children's needs that their mothers received entitlements, in order to better fulfil their maternal responsibilities.⁵

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. The chief beneficiary was organized labour, the natural constituency of corporatist regimes and a relatively privileged sector for long afterwards. 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 most categories of formal sector workers. Regional policies were now influenced by the ECLAC (United Nations Economic Commission for Latin America and the Caribbean) or *Cepalista* guidelines⁶ which 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).

However, while *Cepalista* developmentalism was associated with universalist principles, and despite the expansion of social provision from the 1960s, most of the region still suffered from poor and skewed coverage and low-quality services. Entitlements remained for the most part tied to formal employment, with pensions available only to a minority of workers, and 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) which was in the informal sector or in domestic service, often 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 UN-defined poverty line.

Gender and social policy

Social policy in Latin America, contrary to some readings, was not *gender-blind* but instead worked with gendered conceptions of social needs, ones which were familial, patriarchal and paternalistic. While women gained access to education and health, and entered 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. Built into the earliest forms of social provision were assumptions of female dependency on a male breadwinner which positioned women as under the protection of 'their' men, whether husbands or fathers. Widows of soldiers, professionals and some formal sector workers were able on this basis to claim their deceased husbands' pensions. Yet most working women were located in low-paid jobs, in unorganized sectors of employment, and in work that was considered supplementary to the male wage and lacked social protection.

In Mexico, the cataclysmic upheavals of the revolution which erupted in 1910 did not greatly alter this general picture.⁷ The Constitution of 1917 and

the civil code of 1928 accorded women legal equality and gave them some new rights, such as the right to divorce, but denied them full civil and political rights; universal female franchise was not granted until 1953 – later than in most other Latin American states (Aranda *et al.* 2000; Gutierrez Castaneda 2002). Over time, the law placed limits on men's authority over their wives, but it was only in 1974 that the code making women responsible for the domestic sphere, and abandoning the home, a specifically female offence, was repealed (Varley 2000).

As elsewhere in Latin America, women workers and women's organizations⁸ pressed for the regulation of their working hours, in order to protect them from over-exploitation. They gained popular support for these demands in a context where there were widely expressed concerns that this was necessary to safeguard their 'maternal functions'.⁹ Paternalist sentiments were aroused by such claims, with women and children positioned in this discourse as requiring protection; many women protested that this was an excuse to deny them the right to equal work and well-paid jobs. Corporatism established a political bond between the worker and the ruling party, ensuring the loyalty of the more powerful 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). Where women had acquired a significant 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 wage negotiations since their very presence in the workforce could compromise the historic demand of organized labour for a 'family wage', one premised on female dependency and the presence in the family of the full-time housewife and mother. If women gained entitlements as workers, these too were not only restricted to a small section of the female population, but were often unclaimable in practice.¹⁰

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 in Latin America. The restricted reach and scope of social policy, the poor quality and difficulty of access of 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 on their own behalf. They might be fortunate enough to attain some minimum provision in education and health, and some support for their children, but individual entitlements 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.

Reforming the Social Sector

The fragility and inefficiency of the social security systems prevailing across much of Latin America were features that were sharply accentuated by the

broader socio-economic 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. This was a period which saw more women entering the labour force, while households sought to cut consumption, substituting market-purchased goods and services with reproductive labour, largely provided by women (González de la Rocha 1994).

The human and social costs of the first phase of the structural reforms helped to revive long-standing debates over social sector reform which now took place both within the region and in international development policy arenas. Cornia *et al.*'s UNICEF study, *Adjustment with a Human Face* (1987) is widely acknowledged as a 'wake-up call' to international agencies to pay attention to the social costs of adjustment. The decades of the 1980s and 1990s could be regarded as a typical instance of the 'hybridized' policy change that has been argued to characterize development policy (Brock *et al.* 2001). In Latin America, by the early 1990s, a complex series of reforms and policies affecting the social sector were being developed, 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). As poverty moved up the scale of international priorities, 1990 saw the launch of the World Bank's New Poverty Agenda, and towards the end of the decade the Millennium Development Goals committed governments to halving extreme poverty and hunger between 1990 and 2015.

Development policy analysts acknowledge that the ideas being advanced at this time marked a significant departure from the structural adjustment objectives pursued during the first phase of the reforms (Lipton and Maxwell 1992: 1). Among the main changes were the importance of civil society, along with an emphasis on certain concepts that became central to the New Poverty Agenda, ones that were not novel in themselves but perhaps were so in their combination. These were the principles of participation, empowerment and co-responsibility.

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. Widely used by 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.¹¹

Empowering the poor and the disadvantaged should result in their gaining more voice and presence in decision-making arenas that affect their lives and developing the capabilities to enable them to escape poverty. 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 micro-credit enterprises.¹² As the capabilities

approach has gained wider acceptance in policy circles, empowerment has come to mean that the poor are to be trained and educated to prepare them for employment.¹³ A further dimension is added to the conceptual basis of the new approach by 'social risk management' as outlined in the 2000/1 World Development Report *Attacking Poverty*, wherein sustainable poverty alleviation entails measures to increase the security of the poor, through developing their capacity to 'cope, mitigate or reduce' their risks (World Bank 2001a: 1). The risk management approach has subsequently been adopted by a wide range of multilateral lending institutions.

Third, and again closely related to these previous 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 towards 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 micro-credit), to providing basic education in nutrition and health care. These latter strategies 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 (Rose and Miller 1992).

Latin America's new social policy

In Latin America the novel features of 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: the changes in the locus and character of state activities; the rise of parallel institutions to assist in the delivery of social welfare; and the promotion of civil society partnership in development and poverty relief programmes. How these elements combined with efforts to create a democratic politics in post-authoritarian Latin America and resonated with historic demands for reform is essential in understanding the ways in which social policy was refashioned in the changed circumstances of the 1990s.

As elsewhere, the official policy discourses and forms of entitlement that are being created in Latin America 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 may be interpreted to mean that the individual has to make responsible provision against risks (through education and employment), the family, too, must play its part (through better care), while the market

(through private interests) and the community (through decentralization 'co-responsibility' and the voluntary sector) are all involved in the decentring of expectations of welfare from the state.¹⁴

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 social protection, the refiguring of state–society relations offered by the 'New Social Policy' approaches 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', 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.¹⁵ From the 1980s calls to 'deepen' democracy, and to address the 'social deficit' of the adjustment years, converged with some of the '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 (Molyneux and Lazar 2003). Women's organizations of various kinds were particularly active in promoting women's rights, working simultaneously within communities and at 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.¹⁶

The new anti-poverty 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. The structural reforms proceeded in tandem with democratic reforms, and the market gained a greater role in the organization of social and economic life. State institutions were modified and state functions were re-defined, but for all the talk of 'hollowing out', the state remained central to social policy funding and delivery despite the cutbacks, decentralization and devolution of its responsibilities. After the critical watershed years of the debt crisis when social expenditure per capita fell to unprecedented levels,¹⁷ by 1991 it had recovered the levels registered at the beginning of the 1980s, and in recent years social expenditure has generally risen across the region. The state itself, however, has undergone reform in this process, led by efforts to advance good governance agendas designed to make state institutions more efficient and accountable and by democratic reform parties and movements.¹⁸ 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. Re-democratization involved a wave of constitutional reform across the region, and decentralization in the form of 'municipalization' was one of the democratic principles

that was incorporated in the new frameworks to redress a historic legacy of over-centralization. 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.

These multiple changes in social welfare provision were bound to have consequences for the large numbers of female poor. 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 policies (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 in securing this visibility: female poverty was a central theme of all the International Women's conferences and the Beijing Platform for Action (PFA) called for it to be addressed as a matter of urgency. The PFA proposed a number of priorities for assistance: the targeting of female-headed households, greater participation of women in decision-making at community and other levels, and the extension of credit to low-income women were among them.¹⁹ 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 'new social policy' therefore evolved during the high point of global feminism and yet, as we shall see, its practical realization often meant that it existed in tension with the latter's emphasis on equality.

For all that the current focus on poverty has its novel features, it is also marked by a continuum with earlier Women and Development approaches that saw 'integrating women' as a way to secure broader development objectives, while failing to tackle underlying causes of gender inequality. If this is a general rule that still applies to many of the new programmes, there is nonetheless some diversity and, indeed, some inconsistency in their conception and implementation. As we will see, the objectives of these programmes determine how women will be involved and how they are affected. To illustrate this point, we now turn to consider the Mexican anti-poverty programme, *Progres/Oportunidades*.

Progres/Oportunidades

Mexico, an OECD country, is the tenth largest economy in the world, but poverty is estimated to afflict half of the population, with a fifth in extreme poverty, due to its highly skewed income distribution.²⁰ 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 means that Mexico collects only 11 per cent of GDP in tax, well below the average for Latin America (which is 18 per cent) and below that of relatively low-tax countries such as the United States.²¹

The election of the National Action Party (Partido de Acción Nacional – PAN) leader Vicente Fox in 2000 ended 71 years of one-party rule by the Institutional Revolutionary Party (Partido Revolucionario Institucional – 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, *Progresa* was modified and relaunched in 2002 under the name of Human Development Opportunities (*Desarrollo Humano Oportunidades*), known today as *Oportunidades* or *Progresa/Oportunidades*. The programme’s coverage, formerly restricted to the rural poor, was extended to include urban and semi-urban areas,²² and the number of those inscribed in the programme was expanded from 2.6 million families (in 1999), the equivalent of 40 per cent 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 mid-2005 it covered 5 million households with an estimated 25 million beneficiaries.

Oportunidades is the second most extensive programme of its kind in Latin America.²³ It is also considered to be the most successfully developed example of the region’s NSP-inspired anti-poverty programmes.²⁴ It has been judged to be particularly effective in meeting its goals, and this is attributed to an unusually high degree of presidential support and inter-ministerial collaboration along with an annual budget that amounts to 0.3 per cent of GDP, equivalent to 25 billion pesos (in 2004), with a recent loan of \$1 billion from the Inter-American Development Bank (IDB). An undoubted strength of the programme is that it is subject to regular evaluations, including by outside bodies, and 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. 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.²⁵ Specifically, *Oportunidades* aims to improve human development by focusing on children’s education, nutrition and health. It is based on the assumption that poor households do not invest enough in their human capital, and are thus caught in a vicious cycle 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, with the financial costs of having children in school. The bi-monthly transfers are primarily in the form of ‘scholarships’ for children to attend school,²⁶ supplemented by additional cash to improve nutrition where

required. 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 workshops and monitoring, the 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). Secondary outcomes, such as building the mothers' capacities, empowerment, citizen participation, strengthening community ties and even gender equality, are included in 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' guiding principles are explicitly designed to differentiate it from assistentialist programmes by an emphasis on the participants' active management of their risk through 'co-responsibility'. As proclaimed on its website, 'co-responsibility' 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* (philanthropy) and paternalism' that characterized earlier welfare systems.²⁷ Co-responsibility in this context is understood as cost-sharing, where beneficiaries contribute their labour for the implementation of projects (Yaschine 1999: 50). This principle is enshrined in the Social Development Law (*Ley de Desarrollo Social*, 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 expresses it, in Oportunidades, 'Responsibility for health and education is to be recognized as not solely the government's but the whole society's, and should be assumed by the entire community' (Rivero 2002: 3).²⁸ 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, the programme and the participating mother. This conditional form of entitlement, although well established in other regions, and originating in the United States, has a more recent presence in Latin America, but it is now being widely adopted. In this case, the responsible participants (mothers) receive their stipend conditional on fulfilling the duties laid 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 programme, typically cleaning buildings or clearing rubbish. Failure to comply with the requirements can lead to being struck off the programme.

On the available evidence collected through regular evaluations, the programme has been largely successful in its own terms.²⁹ Its stipends have reduced household poverty, and have improved school attendance of children, as well as the health and nutritional levels of all those inscribed in the programmes.³⁰ These are important gains, and are extensively discussed elsewhere. Here we will focus on some of the more contentious aspects of the

programme as highlighted by the women participants in interviews and evaluations, before considering the question of the programme's gender impacts.

As far as the design of the programme is concerned, there appear to be two main criticisms that participants have made which raise some general issues of principle. In an exercise designed to elicit the opinions of beneficiaries, targeting and co-responsibility aroused some negative reactions.³¹ 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 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 notes that 'targeting of the population has introduced some social divisions between beneficiaries and non-beneficiaries' (2005: 2), 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, a factor which has caused it to be dubbed by those in charge of it, 'a near universal programme'.³²

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.³³ Some complained of being made to do 'absurd' tasks 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 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 much. 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)?³⁴ 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, political and social rights and as a means to achieve full citizenship' (Rivero 2002).³⁵ Several evaluations have also criticized deficiencies in the quality and availability of health care, which has not been able to cope with the expanded demand generated by the requirements of the programme.³⁶

Gender relations: now you see them, now you don't

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. There are four main aspects to this gender sensitivity: first, the programme was one of the earliest in Latin America to give the financial transfers (and principal responsibilities associated with them) to the female head of participating households; 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;³⁷ and third, the programme's health-care benefits for children were supplemented by a scheme which monitors the health of, and provides support for, pregnant and breastfeeding mothers and children under 2 years of age. The fourth aspect of the project design which displays gender sensitivity is the goal to promote the leadership and citizenship of the women subscribed. 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 a paucity of appropriately detailed evidence on this question, and far from sufficient to make any accurate estimate.³⁸ Most information that is available comes from large-scale surveys by Adato *et al.* (2000), Skoufias (2005) and Skoufias *et al.* (2001), 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'. Secondly, 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 confirms these trends, although, as one evaluation noted, while the mothers enjoyed some increased autonomy, this did not necessarily translate into empowerment, since the latter depended on more factors than control over a small money income (Escobar Latapí and González de la

Rocha 2004). Women did, however, appear to feel that their self-esteem was enhanced as a result of the stipends;³⁹ they also felt that they acquired more status in their neighbourhoods, with shopkeepers treating them as credit-worthy. They appreciated the programme's education and training projects (including health and community leadership) where these were well organized, but they 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 re-ordering has on household livelihoods and well-being. 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, existing data indicate that no strong relationship has been found linking the programme and the incidence of violence in the home,⁴⁰ but expert opinion is divided over the reliability of data collection on this sensitive issue.

The generally positive findings, however, might need to be qualified in the context of more critical appraisals. While 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* (voluntary workers) and assessors (Red de Promotoras y Asesoras Rurales 2000) concluded that there was no significant improvement in women's position in their families,⁴¹ the stipend was insufficient to overcome poverty, health services had to be paid for and were costly, and the programme did not generate employment opportunities for school-leavers which would enable the cycle of poverty to be overcome.⁴² Escobar Latapí and González de la Rocha (2004) further noted that the programme did not take sufficient account of women's income-generating and other activities such as collective community work (*faenas*) and that as a consequence women could be overloaded with competing demands on their time. This was even more the case with the *promotoras*, who dedicated on average 30 hours a month to administrative, pastoral and medical responsibilities (Red de Promotoras 2000: 13). Adato (2002), 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 who were helping more with domestic tasks than sons, and they left school earlier. Another effect of the transfers appeared to be that men were doing less income-generating work (Rubio 2002; Escobar Latapí and González de la Rocha 2004). 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 2000: 15). These findings seem far from the gender-equality and empowerment objectives proclaimed by the programme's self-description.

Female altruism at the service of the state?

Oportunidades exemplifies the maternalism at the heart of many of the new anti-poverty programmes being established in Latin America, and its

organizational principles raise some important questions for gender analysis. More than 40 years of research and activism on gender issues has shown that if women's subordination is to be tackled in development and welfare programmes, these must have some potential to empower women and enhance their capabilities in ways that enable them to challenge relations of inequality and at the same time provide some scope for female economic autonomy. The new anti-poverty programmes may successfully identify some unmet needs within poor households and communities, but attending to the diverse needs of the women (the mothers) who are central to the functioning of these programmes is not their explicit aim, any more than is gender equality a consistently observed objective. The social construction of need in these programmes is child-centred, as is their overall organization. Women are incorporated into programme design (i.e. are visible) but in a way that depends upon the gender divide for its success. Thus, even as women might be marginally 'empowered' within these structures (through managing the subsidy), such 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 on normatively ascribed maternal responsibilities, in effect making transfers conditional on 'good motherhood'. Men are not incorporated in any serious way, and no effort is made to promote the principle that men and women might share responsibility for meeting project goals, let alone for taking an equal share in caring for their children. These programmes unambiguously rest on normative assumptions concerning 'women's roles' so that the work women undertake, in ensuring that children's needs are met, is taken for granted as something that mothers 'do'. The social relations of reproduction therefore remain unproblematized, with the work performed simply naturalized.

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. Throughout the modern history of Latin America motherhood has been offered as the explanation for political or civic activism, and allied with moral virtue, altruism and self-sacrifice (Miller 1991). The continuity with this tradition is evident in contemporary social policy where it successfully mobilizes women in accordance with these values. It is readily assumed by programme managers and participants alike that any actions that improve the well-being of children are not, as Bradshaw and Quirós Viquez (2003) express it, a 'burden' for women, and any 'costs' they bear are 'simply part of the mothering role'. If femininity is 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. Beneficiaries who miss a clinic appointment or a workshop because they were at work lay themselves open to the charge of being 'bad mothers' who do not care for their children (Bradshaw and Quirós Viquez 2003). By the same token, men who wish to care for their children are not only marginal to the programme but, should they become involved in caring, are vulnerable to being denigrated as

'feminine'. Marginalizing men from these responsibilities is not in their overall interests any more than it is in their children's or their wives'. If equality issues are to move beyond rhetoric into policy, and if women are to be given an opportunity to redefine the terms of their inclusion in their societies, the unequally valued forms of social participation for men and women that pervade the organization of care work need to be challenged rather than deepened by state policies.

If there are parallels with early twentieth-century philanthropy, there are modern modifications. The Mexican programme seeks even greater commitment from mothers by the regulation of their domestic responsibilities through conditionality, situating them as the principal managers of their families' needs.⁴³ This might involve some status re-ordering in the household in favour of mothers in that it enhances and makes visible the responsibilities of motherhood, but any change of status occurs *within* the traditional domestic division of labour. While much is said about the 'individuation of the social' in regard to neo-liberal policies, this does not apply to the women in these programmes who are *per contra* bound ever more securely to the family. If there are new elements beyond the purely technical administration of the project, one is the (albeit selective) sensitivity to issues of gender equality – in the case of girl children, if far less so in the case of their mothers. Gender equity considerations have clearly had some influence, albeit partial, 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 since the mid-1970s.

It remains the case, however, that the mothers in such programmes are primarily positioned as a means to secure programme objectives; they are, as argued elsewhere, 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 (Molyneux forthcoming). 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. This is compounded by the fact that there is little in the design of the programmes that addresses their need for economic autonomy or security. Training for the job market is limited or non-existent, despite this being a frequent request by beneficiaries, and there is scant, if any, childcare provision for those women who want or need it because they work, train or study. Adato *et al.* (2000) found that 'while the women like, appreciate and need the benefits of Progresa, they ask for government programmes that will give them skills that will help them engage in productive activities and earn income. They also want to learn to read and write, in order to sign papers, help their children with their studies and homework, and to defend themselves.' This more closely approximates to the idea of empowerment than vague notions of status enhancement. Poor women in Latin America are calculated by CEPAL to earn on average only 17 per cent of their male counterparts; but they are often involved in income-generating activities and reciprocal exchanges which are essential to household survival. González de la Rocha (2003: 6), indeed, noted an 'increasing dependency' on women's earnings among beneficiaries. Despite such activities being precarious as well

as poorly remunerated, they can still leave women without much disposable time or flexibility when they are responsible for the main household tasks.⁴⁴ Indeed, while this is rarely acknowledged, participation in anti-poverty 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). 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 in a programme designed to 'overcome poverty'.⁴⁵

Conclusions

Conditional cash transfers based on, or similar to, the example analysed here are set to become the preferred form of poverty relief in the developing world. Where allied to human development objectives as in the case of Oportunidades, they can help to tackle children's educational deprivation and break the cycle of inter-generational poverty transmission. As we have seen, Oportunidades has many commendable features even beyond its noted successes with regard to improving children's health and life chances. It has, over time, expanded its coverage and has sought to respond to some of the gaps in its provision, taking account of evaluations in the modifications of its programme. It has enabled low-income households to cope financially with the demands of school-age children, and it has also made some headway in detaching poverty relief from political patronage. Through the stipend paid to their mothers, young people from poor households can access some of their social rights such as education and health, and local political rights have to some degree been restored.

However, in considering the less positive aspects of the programme, and in focusing on what can be summed up as its *selective* treatment of social need, some of its core assumptions and main claims have been put in question. In particular, there are reasons to doubt how far the programme has succeeded in 'empowering women' when its success is so dependent on fortifying and normalizing the responsibilities of motherhood as a way to secure programme goals. With fathers marginal to childcare and further marginalized by the design of the programme, the state plays an active role in re-traditionalizing gender roles and identities. As Chant (forthcoming) has argued, there is occurring a 'feminization of responsibility and obligation' for managing poverty 'with women being made to do more to ensure household survival, when men are increasingly doing less'. In effect, Oportunidades creates a dependency on a subsidy which confirms mothering as women's primary social role, one which may enhance their social status and self-respect, but nonetheless, in doing little to secure sustainable livelihoods, puts them at risk of remaining in poverty for the rest of their lives.

Oportunidades is, as noted earlier, not particularly original in its treatment of mothers: it reveals the double normativity that has prevailed for women

in public policies in Latin America since their inception. Women might be citizens in the public realm and may gain formal equality of rights, just as the daughters in the programme now have full access to education; however, at the same time, as mothers, women have been, and remain, marked by difference in the private realm, where motherhood brings responsibilities within the family, but little recognition of the economic vulnerability that this implies, especially in an age where inter-generational reciprocity may be in decline.

Today such policies not only seem at variance with the declared equality goals of the government's gender policy unit, the National Women's Institute (2004), but they are also unlikely to meet their promise of delivering sustainable poverty relief and full access to citizenship. Despite the rhetoric, poverty relief is still treated all too often as a matter of an unproblematized social need, abstracted from the social and, hence, gender relations that produce it (Jackson 1998). The classic 'assistentialist' programmes that targeted women and children at high risk and in poverty exemplified this approach, and were commonly associated with paternalist notions of care and charity. They made little if any attempt to address the conditions which placed their beneficiaries in these circumstances and concentrated on short-term relief typically delivered in the form of food aid and primary health care. The ideas of the New Social Policy try to go beyond this through participation, gender awareness, capacity-building, and by allowing the poor to access their citizenship rights. Yet in practice these ideas are only thinly or partially addressed in these programmes. Stipends, however welcome, offer little to the poor in a context of deepening inequality, unemployment and shrinking rural livelihoods. Effective poverty relief and 'exit strategies' for the poor can only come about when linked to sustainable, pro-poor, regional and local development strategies, which are currently thin on the ground.

For women in poverty, current programmes appear to offer both risks and opportunities. They are placed to occupy a central role in the new poverty agendas, and the evidence shows that many women in Latin America experience some satisfaction from participating in community- and child-focused activities that are not tied to monetary reward. They may be happy to contribute their time and effort to their children's future, but they still need projects that enhance their capabilities through education or training, providing links to employment, and advancing credit for successful projects that enable them to acquire their own assets and secure their own futures. Above all, women need a reliable income source and sustainable routes out of poverty, ones that are at the same time more realistic and imaginative than the maternalist options that are currently in place. The limits of programmes like Oportunidades are evident, therefore, not only in their selective approach to tackling social need, but in their narrow vision of how to overcome poverty; stipends are no substitute for economic regeneration, and without attention to the household livelihoods and long-term prospects of the poor, *including women*, such programmes, despite their good intentions, remain fundamentally trapped in the 'assistentialist' paradigms that they claim to supersede.

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Notes

1. The analysis draws on conversations with Oportunidades Director Rogelio Hermosillo and Chief Programme Evaluator Concepción Stepa, as well as on interviews with beneficiaries and *promotoras* conducted while on field visits to the programme in Huachinango, San Miguel de Tenango and Zacatlán de las Manzanas in July 2005.
2. This term was first used by the World Bank but it has acquired a wider currency since.
3. Colombia is a possible sixth according to some analysts. For overviews and analysis of Latin American social policy see, *inter alia*, Abel and Lewis (1993, 2002), Abel (1996), Mesa-Lago (1994, 2000), Haagh and Helgo (2002), Barrientos (2004) and Tulchin and Garland (2000). On Latin America's 'liberal-informal' welfare regime see Barrientos (2004).
4. This group includes a socialist (Cuba), a market (Chile) and a mixed economy (Costa Rica) model of welfare. See Mesa-Lago (2000) for elaboration of these comparative observations.
5. On the early to 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).
6. *Cepalista* refers to the policies of the Economic Commission of Latin America, an agency of the UN that was under the direction of Raúl Prebisch.
7. For an excellent collection of papers on gender issues in Mexico see Baitenmann *et al.* (2007).
8. On early maternalist philanthropy, see e.g. Schell (1999).
9. As early as 1906, in Uruguay, bills were proposed to give rights to maternity leave, and legislation to restrict women's working hours was first introduced in Argentina in 1905.
10. Barriers to claim-making included administrative obstruction, low female educational attainment and ignorance of rights. For indigenous women, the lack of an identity card would be sufficient to bar them from their entitlements.
11. See Parpart *et al.* (2002) for a fuller discussion of the idea of empowerment from a gender perspective, and Townsend *et al.* (2000) for a feminist application to women's grassroots organizations in Mexico.
12. These ideas permeate development agency literature, whether governmental, third-sector or international development institutions. For a good example see

- Voices of the Poor* (Narayan *et al.* 2000) and the *Empowerment Sourcebook* published on the World Bank website. Available at: www.worldbank.org.
13. See UNDP (1995) for a discussion of gender and poverty, and on capabilities see Nussbaum (2002).
 14. See SEDESOL (2003) and its website postings for examples of this conceptualization.
 15. See Jelín and Hershberg (1996) for further discussion.
 16. See Craske and Molyneux (2002) for case studies of women's movement activism in the 1990s.
 17. 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 at the end of that decade, and only recovered slowly in the 1990s (IDB 1996).
 18. See Weiss (2000) for a history of the contemporary usage of 'good governance' in development policy.
 19. The Beijing Declaration and PFA can be found at: www.un.org/womanwatch/daw/beijing/platform/.
 20. ECLAC 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 (ECLAC 2005; Urquidí 2003). The top 20 per cent accounted for 59.3 per cent of income in 1989; the bottom 20 per cent for 3.9 per cent (Grindle 2000: 20).
 21. In 1990 social expenditure accounted for 6.1 per cent of GDP. It rose to 9.5 per cent in 2000 (IMF 2002: 18).
 22. Progresá was preceded by PRONASOL, also known as Solidarity, Mexico's first large-scale anti-poverty programme. Established in 1988, its conception of poverty relief was quite different from Progresá's and had party political objectives. It was designed by the 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 PRD supporters and to punish PAN supporters (in Rocha Menocal 2001: 524). Such manoeuvres delivered the expected returns to the ruling party, but the programme was discredited. When Zedillo assumed the presidency, he replaced PRONASOL with Progresá, claiming that his new anti-poverty 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.
 23. Topped only by Brazil's 'Zero Hunger' and Bolsa Familia programmes which reached 7 million families in June 2005.
 24. Though 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, Progresá was not imposed by the Bank. Progresá 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 above.
 25. Here *Contigo's* official rhetoric closely parallels that of the World Bank.
 26. 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.

27. Available at: [www://progesa.gob.mx/html/quienes_somos.html](http://www.progesa.gob.mx/html/quienes_somos.html) (accessed 15 May 2003).
28. All translations are by the author unless otherwise stated.
29. The International Food Policy Research Institute website contains a number of evaluation reports on different aspects of Progesa/Oportunidades. See, in particular, Skoufias *et al.* (2000), which covered the three years up until 1999, as a result of which the programme was extended to rural areas. The results of a qualitative evaluation carried out in six communities by Escobar Latapí and González de la Rocha were published in 2004 and will be referred to here.
30. Escobar Latapí and González de la Rocha's qualitative research confirmed the findings of Skoufias *et al.* (2000) that the largest positive impacts were on children in secondary school. 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.
31. This exercise carried out in 2000 and supported by the World Bank, UNIFEM and the Mexican government, charged three NGOs in different regions with the task of investigating the attitudes of beneficiaries towards the programme. The results are summarized in Rivero (2002), and similar findings are found in other evaluations.
32. As stated by the Director of the Programme in July 2005. In some poor regions coverage is as high as 95 per cent.
33. In the Progesa programme such work involved on average 29 hours per month.
34. 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).
35. Since the programme strives to separate social entitlements from political clientelism, this is another sense in which citizenship is understood.
36. All cited evaluations made this point, even the most recent evaluation (2004) by the Instituto Nacional de Salud Pública (INSP) and the Centro de Investigación y Estudios Superiores en Antropología Social (CIESAS) available on the SEDESOL website. This evaluation also found that around 70 per cent of birth-weights 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).
37. 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 US\$58 for boys and US\$66 for girls.
38. An audit of the gender effects of the programme is currently under discussion.
39. Agustín Escobar and M. González de la Rocha (2004).
40. According to Adato *et al.* (2000) and my own interviews with specialists in gender and poverty, there has been considerable evidence of violence against women over control of the stipend in some regions (author's interviews, Oaxaca, July 2005).
41. Based on a survey of 309 beneficiaries supplemented by 60 interviews with *promotoras*, teachers and health professionals in eight communities.
42. Some 85 per cent of respondents 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 young people I interviewed saw themselves as having no future in their localities and planned to migrate to the USA. Without attention to rural livelihoods, Oportunidades risks educating the young for the US labour market.

43. See also Luccisano (2002) for this point.
44. See, for example, Gideon (2002) on Chile, Bradshaw (2002) on Nicaragua.
45. A pilot project undertaken by the BID is working with mothers to engage in productive activity; this is clearly a step forward and signals an awareness of this shortcoming.

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