

Bolsa Família and ‘*Progres/Oportunidades/Prospera*’: consensual reforms?

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*Progres/Oportunidades/Prospera*¹ in Mexico and *Bolsa Escola/Bolsa Família* in Brazil were pioneer conditional cash transfer programmes (CCTs) in Latin America and remain the two largest and best-known social assistance programmes in the region.

Their emergence was influenced by the critique by reformist actors of the inefficiencies and distortions of previous social assistance programmes. They highlighted the need to move away from some clientelistic anti-poverty practices—especially ‘first ladyism’²—and to eliminate political scandals involving social assistance programmes.

Although CCTs seem to have reached a consensual status in the region, implemented by both right- and left-leaning governments, variations in their design reflect different views of their purpose. This consensus is also ambiguous, since the goals and objectives behind these policies may vary, particularly regarding potential tensions between long-term objectives of human capital accumulation and the short-term objective of immediate poverty alleviation.

Moving beyond this apparent consensus and the sterile discussion about programme ‘paternity’, it is important to understand how these new programmes emerged and which set of core ideas supported them. Since the 1990s, many actors have striven to influence their design. In contrast to much of the literature on the diffusion of CCTs in the region, which focuses only on exogenous dimensions and transnational dissemination, any study on Brazil’s and Mexico’s CCTs should underscore the endogeneity of this institution-building process.

These different views can be roughly classified into three groups, with similar beliefs in the increasing use of cash transfers but advocating different purposes and design solutions. The dominant advocacy coalition believes that the promotion of investment in human capital should determine the development and implementation of CCTs. They advocate strengthening both health and education conditionalities to prioritise long-term poverty reduction, an approach based on the idea that healthier and better-educated children will have better work opportunities in the future.

The second coalition proposes unconditional cash transfers and, if possible, universal basic income. They defend the idea that poverty can only be fought by guaranteeing the right to a basic income, regardless of the person’s current income and wealth. In Brazil, the pro-unconditional, universal basic income coalition considers *Bolsa Família* a first step. In Mexico City, this coalition was able to implement in 2003 a non-means-tested and non-contributory programme that is essentially a universal pension (*Pension Alimentaria Ciudadana de Adultos Mayores*), which was meant to rival the Mexican CCT programme in the universality and non-conditionality of social assistance benefits.

Finally, the third coalition advocates for food and nutrition security. In its view, cash transfers should be linked with better access to locally produced foods, which in turn would stimulate local economies. Developed mainly in

Brazil, the pro-food-security coalition also advocates for the participation and mobilisation of civil society in the fight against poverty and hunger. During the design phase of *Bolsa Família*, it supported the inclusion of several features from the preceding *Fome Zero* (‘Zero Hunger’) programme and of the *Cartão Alimentação*—a cash transfer programme limited to the semi-arid region of the country, whose transfers should be spent on food from local markets and stores.

Tomazini (2017) suggests that advocacy coalitions are crucial to understand how different reforms that took place in diverse institutional contexts and through distinct mechanisms have led to similar results: the development of large-scale CCTs. Two types of gradual and transformative change were found in CCTs in Brazil and Mexico: *layering* and *displacement*, respectively, according to the typology of Mahoney and Thelen (2010). In Brazil, *Bolsa Família* has been built by *layering* multiple, pre-existing CCT programmes, initially at the municipal and state levels and then at the federal level across different ministries. In Mexico, the process of change and consolidation of CCTs occurred as a complete institutional shift from generalised subsidy programmes to cash transfer programmes, but with the gradual removal of existing rules from *Pronasol*—an anti-poverty programme—and food subsidies.

Coalitions adopted different strategies depending on timing and context. In Mexico, there was competition between defenders of the new policies (especially the ‘pro-human-capital coalition’) and promoters of old institutions, who competed until the middle term of Ernesto Zedillo’s government. Change agents from the pro-human-capital coalition in Mexico adopted an insurrectionary strategy: they actively mobilised against existing institutions and rules. Some years later, the pro-human-capital coalition changed some rules of *Oportunidades* to address the needs of elderly people, diverging somewhat from the intentions of the programme’s original framers while still retaining the characteristics of their cognitive matrix. In Brazil, the dominant human capital paradigm acted in a subversive way, encouraging CCT policies at the subnational level and bringing change as policy developments on the periphery made their way to the federal level. While the pro-human-capital coalition is joined by other actors who are seeking similar reforms, they provided a strong ideological rationale for this process, overlapping with unconditionality and food security ideas. Despite having less influence in CCT subsystems, actors from other coalitions (pro-unconditional income and pro-food security) act in either a defiant or an interdependent-symbiotic manner as they struggle to remain relevant.

References:

Mahoney, James, and Kathleen Thelen (eds). 2010. *Explaining Institutional Change: Ambiguity, Agency, and Power*. Cambridge: Cambridge University Press.

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Notes:

1. Initially known as *Progres*, then *Oportunidades*, the programme was renamed *Prospera* in 2014.
2. A term used to describe the practice of social assistance policies led by the wives of the president, governors and/or mayors.