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# HOUSEHOLDS AND SOCIAL POLICY IN MEXICO: *Oportunidades*' case

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*Bi-Regional Conference on Social Protection and  
Poverty Reduction*

Cape Town, South Africa, 6th-9th June, 2007

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# A Conditional Cash Transfer Programme: *OPORTUNIDADES*

- Targeted to the poorest (technical procedures)
  - Provides cash transfers to poor families (a food support amount; and scholarships for every school child from third year of basic education to high school). Girls get higher amounts
  - Provides a nutritional supplement (micro-nutrients) for pregnant women (and breast-feeding), under 2 years old and under 5 when they need it
  - Cash transfers are conditioned to: school attendance, and medical check-ups of all household members, particularly pregnant women and children under five. Attendance to *pláticas* (talks) devoted to the promotion of health
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## OPORTUNIDADES: from rural to urban and metropolitan poor households

- As PROGRESA in 1997, the programme incorporated only poor rural households
  - 2001: expanded to semi-urban settlements (small cities up to 50,000 inhabitants)
  - 2002: included urban areas (up to one million inhabitants)
  - 2004: incorporated households in large metropolitan areas
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# OPORTUNIDADES: growth and expansion

Year	Municipalities #	Localities	# Hhs
2000	2,166	53,232	2,476,430
2001	2,310	67,539	3,116,042
2002	2,354	70,520	4,240,000
2003	2,360	70,436	4,240,000
2004	2,429	82,973	5,000,000
2005	2,435	86,091	5,000,000

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## SCHOLARSHIPS: growth & expansion

From 1997 to 2001: only from third year of primary school to third year of “secondary”

Since 2001: started giving scholarships to “preparatoria” students (level before university)

	<i>PRIMARIA</i>	<i>SECUNDARIA</i>	<i>PREPA</i>
2006	2,867,760	1,734,643	696,353

Total number of students: 5,298,756 in the three levels of education

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# SIGNIFICANCE OF OPORTUNIDADES (number of poor)

- Five million households: aprox. 25 million people (one quarter of Mexican population)
  - According to official figures: 24.2% of Mexico's inhabitants did not have (in the year 2000) enough income to buy a basic food basket (*pobres alimentarios*)
  - The programme will not continue to grow in terms of number of households, but has to improve the beneficiaries *padrón*: there are still “inclusion and exclusion errors”
  - Still needs to work harder to avoid school desertion (secondary level) and incorporate more high school (*preparatoria*) students.... **The ethnic differential**
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## CASH MONTHLY TRANSFERS GIVEN TO WOMEN

Food supplement: \$180.00 (aprox. 16 USD)

Primary school: from \$120.00 (11) to \$240.00  
(21) for boys and girls (no differential)

Secondary school: from \$350.00 for boys and  
\$370.00 for girls to \$390.00 for boys and  
\$450.00 for girls (41 USD)

Preparatoria: from \$585.00 for boys and  
\$675.00 for girls to \$665.00 for boys and  
\$760.00 for girls (79 USD)

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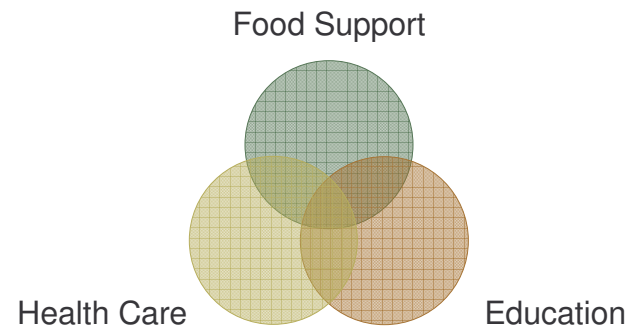
# OPORTUNIDADES IS NOT...

- A programme to reduce poverty in the short- term
  - It was designed to break the “inter-generational circle of poverty” (**low levels of labour returns; high fertility or reproductive strategy that maximises the number of potential workers; early school desertion; and early creation of new households with the same profile**), through a medium and long-term process of human capital construction (accumulation)
    - Health ►
    - Education ► Labour market insertion (less unequal competition)
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# OPORTUNIDADES: a targeted social policy programme

- Worst-Off Households (presence of children, high dependency rates).
- To what extent have Oportunidades and/or other factors increased options and choices of the poor?



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# IMPACT EVALUATIONS:

- The most and better evaluated social policy programme in Mexico: evaluations started in 1999 and are conducted every year.
  - Quantitative: nutritional impact of supplement, education with large data bases
  - QUALITATIVE evaluations based on **ETHNOGRAPHICAL** research:
    - Rural, urban and semi-urban settlements
    - Households, incorporated to the programme at different moments – years, as the programme expanded from rural to urban contexts (different “cohorts”)
    - Accumulated data –case studies of different households
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# HOUSEHOLDS AND VULNERABILITY

- *Procesos domésticos y vulnerabilidad: perspectivas antropológicas de los hogares con Oportunidades* (González de la Rocha, ed., 2006)
    - ❑ A synthesis of results coming from five years of research conducted as external evaluations
    - ❑ Provides an **in-depth analysis of different types of households receiving the programme's support**
    - ❑ Through a diachronic and anthropological perspective: focuses on processes that lead to different outcomes (success and failure stories)
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# MAIN RESEARCH INTERESTS:

- Special interest in PROCESSES OF CHANGE as an outcome of the programme's impact (other factors such as emigration/remittances):
    - household consumption patterns & housing
    - household division of labour
    - household structure and composition
  - Factors ▲ households' vulnerability
  - Factors ▼ vulnerability (or increase well-being)
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# FAMILIES AND HOUSEHOLDS:

## welfare & survival

- Survival scenario: activities and tasks for the generation of income (“survival strategies”)
  - Reproductive tasks and care provision
  - Specialised care for the sick
  - New responsibilities (co-responsibilities that household members must comply)
  - Not the household as a whole, but mainly **women**: seen by some authors as instruments of the State (Molyneux)
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# HOUSEHOLDS: instruments of social policy programmes

- New social policy: the domestic unit as a pillar in the operation of new programmes (in order to improve their success)
  - Social policy's view of the family: TRADITIONAL MODEL that does not fit with changing family and hhs patterns
    - Men: economic providers
    - Women: care providers
  - Increasing tensions and conflicts: women waged work; women reproductive work; co-responsibilities
  - Tensions clearly seen (exclusion “errors” and desertion)
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# MAIN FINDINGS

- Labour: the most important resource in the hands of the poor, BUT a vanishing asset
  - Rural households' livelihoods rely less and less on agriculture and male heads' contributions
  - Self-provisioning is not sufficient to guarantee survival
  - Household strategies have become less diversified
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# LABOUR: a vanishing asset

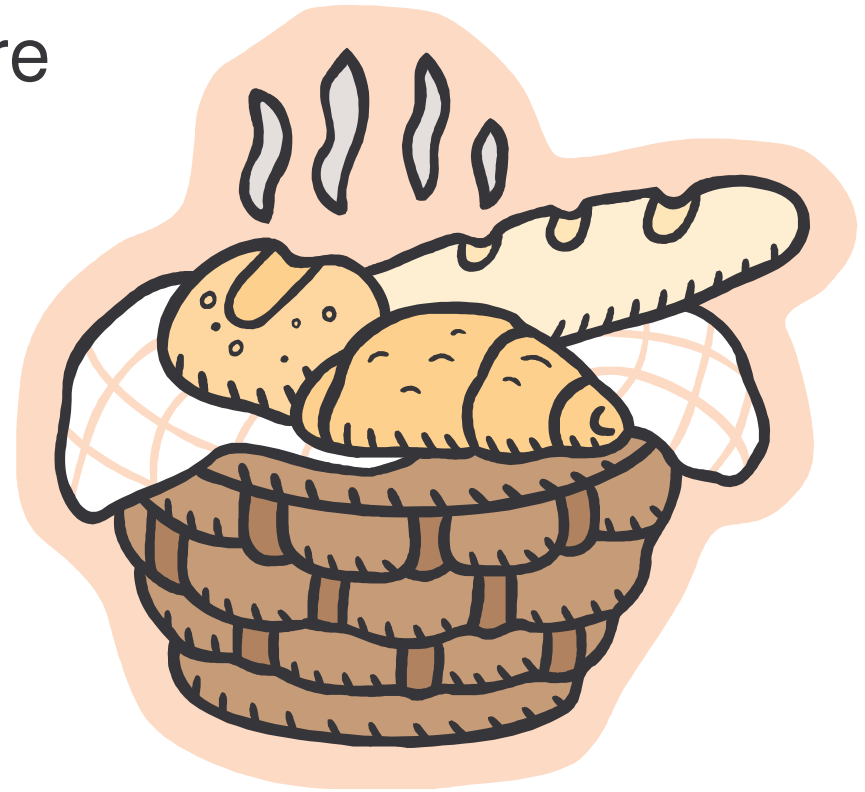


- Withdrawal of rural hh's from agriculture: only 30% of Oportunidades hhs have access to land (small plots and without irrigation)
  - Male providers...??? men are failing: drunk, ill or unemployed
  - Feminisation of household economies
  - Lack of local waged opportunities (reduction of local employment options)
  - Increasing emigration to USA and to some dynamic Mexican regions (in the North)
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# SELF-PROVISIONING: in danger

- Withdrawal from agriculture
- Self-produced fruits and veggies: seasonal
- Healthy “backyard economy” (*economía de traspatio*), BUT,
- Increasing dependence on money for consumption



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# DE-DIVERSIFICATION OF HOUSEHOLD STRATEGIES

- Increasing problems of adult-males to act as economic providers
  - Lack of local employment options for youths; search for employment at later time in the life-cycle (more years of schooling)
  - Children do not participate as much as in the past in the generation of income (education)
  - Strategies of survival: increasingly feminised, relying on informal work, remittances, and on social programmes' transfers
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## PROGRAMME'S IMPACT:

- ▲ Consumption (food, clothing, shoes) through direct – ▲ cash- or indirect means: credit  
*Oportunidades* revitalises debt economies
  - ▲ Housing (improvements): building new rooms, fences, painting, etc.
  - ▲ School attendance, particularly girls' (gender gap has narrowed)
  - ▲ Health and nutritional indicators, in a slower pace
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# LONG-TERM IMPACT

- Is Oportunidades achieving its main goal?

To break the intergenerational circle of poverty

We do not know yet.... Given the youth of the programme, we have not been able to analyse boys and girls insertion in the labour market

2007: analysis of labour market insertion and labour histories; fertility patterns, marriage or union patterns

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## VULNERABILITY FACTORS:

Oportunidades does not abate vulnerability or poor households, as long as vulnerability factors exist:

- Precarious labour markets, deteriorated agricultural production
  - Critical stages of domestic cycle
  - Feminised household economies
  - Old age and chronic disease
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# CUMULATIVE DISADVANTAGES

- Households with a reduced number of potential workers
  - Low degree of diversification of income sources
  - Precarious occupations
  - High dependency rates (children and elderly)
  - Fragile networks (social isolation)
  - Difficulties to be incorporated by or to continue in the programme
  - Decreased capacity to react (resourcefulness) to crises
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# DECREASING VULNERABILITY

- Diversification of income sources
  - Intensification of household labour force
  - Stable jobs and income
  - Co-existence of female and male waged labour
  - Existence of productive assets (land, water)
  - Lower dependency rates
  - Equilibrium stage of domestic cycle
  - Networks of support
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