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The evolution of public policies and social programs to reduce poverty and income inequality in Brazil and Mexico over the last two decades

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Master in Political Economy

Supervisor: Renato Miguel Emídio do Carmo, Associate Professor (with Aggregation), ISCTE – Instituto Universitário de Lisboa

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CIÊNCIAS SOCIAIS E HUMANAS

Department of Political Economy

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RESUMO

Esta dissertação analisa a evolução das políticas públicas e dos programas sociais destinados a reduzir a pobreza e a desigualdade de rendimentos no México e no Brasil entre 2003 e 2024. Centrando-se nas iniciativas de transferências monetárias condicionadas (TMC) — como o Bolsa Família, no Brasil, e o Progresa/Prospera/Bienestar, no México — e nas principais reformas educativas, o estudo explora de que forma a ideologia política, a capacidade institucional e as estruturas socioeconómicas moldaram a sua conceção, implementação e continuidade. Recorre a uma abordagem mista, que combina o estudo de caso comparativo e a análise processual (process tracing), para examinar os fatores determinantes das políticas, os momentos críticos e os mecanismos causais ao longo das administrações. Os resultados revelam que, embora ambos os países tenham alcançado uma redução significativa da pobreza e melhorias de curto prazo na distribuição do rendimento, a estagnação recente evidencia constrangimentos estruturais persistentes. As TMC mostraram-se resilientes graças ao desenho centralizado, ao financiamento estável e à avaliação rigorosa, ao passo que as reformas educativas enfrentaram maior controvérsia política, sobretudo quando implementadas sem a participação dos professores ou sem recursos adequados. O estudo conclui que a sustentabilidade a longo prazo da redução da pobreza e da desigualdade depende do equilíbrio entre compromisso político e resiliência institucional, bem como do enfrentamento das persistentes disparidades regionais e raciais. Do ponto de vista teórico, salienta a complementaridade das abordagens Estruturalista, do Capital Humano e das Capacidades na compreensão das trajetórias de políticas na América Latina.

Palavras-chave: redução da pobreza, desigualdade de rendimentos, transferências monetárias condicionadas, política educativa, México, Brasil

Classificação JEL: I38 (Política Governamental; Provisão e Efeitos dos Programas de Bem-Estar), O54 (América Latina; Caraíbas)

ABSTRACT

This dissertation examines the evolution of public policies and social programs aimed at reducing poverty and income inequality in Mexico and Brazil from 2003 to 2024. Focusing on conditional cash transfer (CCT) initiatives—such as Bolsa Família in Brazil and Progresa/Prospera/Bienestar in Mexico—and major education reforms, the study explores how political ideology, institutional capacity, and socioeconomic structures shaped their design, implementation, and continuity. Employing a mixed-methods approach that combines comparative case study and process tracing, the research analyses policy drivers, critical junctures, and causal mechanisms across administrations. The findings reveal that while both countries achieved significant poverty reduction and short-term improvements in income distribution, recent stagnation highlights enduring structural constraints. CCTs proved resilient due to centralized design, stable funding, and rigorous evaluation, whereas education reforms faced greater political controversy, particularly when implemented without teacher participation or adequate resources. The study concludes that long-term sustainability of poverty and inequality reduction depends on balancing political commitment with institutional resilience and addressing persistent regional and racial disparities. Theoretically, it underscores the complementary insights of Structuralism, Human Capital, and Capability approaches in understanding Latin American policy trajectories.

Keywords: poverty reduction, income inequality, conditional cash transfers, education policy, Mexico, Brazil

JEL Classification Codes: I38 (Government Policy; Provision and Effects of Welfare Programs), O54 (Latin America; Caribbean)

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INTRODUCTION

Inequality is deeply rooted in Latin American societies, creating a major barrier to inclusive development and social progress. Despite the region's rich cultural heritage and abundant natural resources, inequality remains widespread and affects many aspects of life. Political resistance from powerful elites, a lack of political will, and limited state capacity often block meaningful reforms. On top of that, economic instability, external pressures, and globalization further complicate efforts to reduce inequality.

This study focuses on how Mexico and Brazil—the two largest economies in Latin America—have addressed poverty and income inequality in the last twenty years. While both countries have made some progress, the inequality gap remains wide. According to the World Bank (2025) the Gini coefficient[1] is 0.43 in Mexico and 0.52 in Brazil (measured by income after taxes or consumption in 2022). These numbers suggest that a deeper review of past reforms is needed if either country aims to change this trend. It's also essential to explore how open these governments are to developing new approaches and involving new actors in tackling the root causes of inequality.

A key focus of this research is the analysis of public policies and social programs in the areas of education and conditional cash transfers (CCTs), designed to reduce poverty and income inequality. These initiatives are primarily classified as active measures, as they require or encourage behaviours that foster long-term self-sufficiency[2]. In Mexico and Brazil, education has long been a critical component of efforts to break cycles of poverty, though challenges in access, quality, and equity remain. Cash transfer programs, such as Brazil's Bolsa Família[3] and Mexico's Prospera/Bienestar[4] (formerly Oportunidades), have been central in reducing immediate poverty,

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[1] "The Gini index measures the extent to which the distribution of income (or, in some cases, consumption expenditure) among individuals or households within an economy deviates from a perfectly equal distribution" Thus, a Gini index of 0 represents perfect equality, while an index of 100 or 1 implies perfect inequality. https://ourworldindata.org/ Jun-2025.

[2] CCTs although have active components, can also be seen as passive programs in their unconditional form of income redistribution aimed at alleviating poverty.

[3] Bolsa Familia is the biggest cash transfer program in Brazil. Its main objective is to break the cycle of intergenerational poverty by addressing immediate financial needs while encouraging long-term investment in human capital through health and education.

[4] The most important conditional cash transfer program in the country aimed at breaking the cycle of intergenerational poverty by investing in health, nutrition, and education.

but their long-term impact on inequality is still debated. These programs are critical to understanding the political and socio-economic drivers of policy development.

Considering the above, the main concern of this research is to study the evolution of these public policies and social programs over the last two decades in both countries. Previous studies and current literature have identified the following as the most common forms in which poverty and income inequality manifest themselves: Economically, a small elite earns a disproportionate share of income and resources, while a large segment of the population struggles to meet basic needs. Socially, inequality is evident in poverty levels and access to quality education, healthcare, and housing, perpetuating intergenerational cycles of disadvantage. Politically, it often results in the underrepresentation of low-income groups and the concentration of power.

Despite these challenges, it is important to acknowledge the efforts made by these economies. Data from *Our World in Data* (2025) shows that between 2003 and 2023, notable reductions in inequality and poverty rates were observed [5]. The income shares after taxes of the poorest 50% rose from 18% to 22% in Mexico, and from 14% to 17% in Brazil. While identifying specific policies targeting inequality can be complex, focusing on poverty and income distribution reforms offers a practical way to evaluate progress. The connection between poverty and inequality is clear: even when economies grow, large income gaps can leave millions behind. This research highlights that link and aims to understand the main drivers behind the policy interventions made in each country, particularly in the fields of education and CCTs.

The methodology for this study applies a mixed-methods approach, using a comparative case analysis to identify key similarities and differences in how Mexico and Brazil have designed and adapted public policies and social programs over the past twenty years. It examines the political and socio-economic factors that influenced policy evolution in both countries. Likewise, a process tracing analysis has been applied to identify the key causal mechanisms that influenced the evolution and transformation of these policies in each case. Within the main results it shows that in both countries, the recent stagnation in inequality reduction is largely structural in nature, requiring long-term strategies and political stability, which depends on a balance between political will, fiscal capacity, and institutional resilience.

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[5] It is important to keep in mind for the analysis of this study, that regardless of the progress, this period suffered the economic consequences brought by the COVID-19 pandemic, where some areas saw the inequality gap rise to levels not seen in twenty years.

This research will also attempt to add value to the current literature, which has primarily prioritized general and short-term measures across Latin America, without fully exploring how shifts in political ideology, institutional capacity, and regional inequality traps have shaped long-term policy sustainability in these specific countries. In addition to evaluating CCT programs, it also examines the main reforms in the education system and compares their design, implementation, and impact in both Mexico and Brazil. The study connects key theories—such as structuralism, human capital, and the capability approach—to the design of social programs and public policies in each country, with a dual focus on education reforms and cash transfer programs.

The thesis is structured into four main parts. The first presents a literature review, outlining key global and national theories and the main drivers behind the policies and programs aimed at addressing poverty and income inequality. The second describes the methodology, detailing the research methods, variables, indicators, and their application. The third presents the main findings and links them to the relevant theoretical frameworks, it also provides an overview of the main demographic features, as well as the political and socio-economic context of Mexico and Brazil during the study period. The final section offers the conclusions and recommendations for future research.

I. LITERATURE REVIEW

I.II. Theoretical Foundations of Poverty and Inequality: Approaches to Policy Design

Why Focus on Poverty and Income Inequality?

Poverty and income inequality are two of the most pressing and persistent socioeconomic issues globally, but also in both Mexico and Brazil. These dimensions directly affect quality of life, access to basic services, and social mobility (to move up or down the social and economic ladder)—making them critical for assessing the evolution of public policies.

These dimensions offer a solid basis for comparing policy approaches and programs evolution across the two countries. Focusing on poverty it allows to evaluate how well social programs meet basic needs—such as access to education, healthcare, and nutrition— especially among the most vulnerable populations. Meanwhile, analysing income inequality highlights structural imbalances that limit social mobility and perpetuate exclusion across generations.

This section provides a comprehensive review of the key literature on poverty and inequality, with a particular focus on the theories and approaches that have shaped the design and transformation of public policies in Mexico and Brazil over the past two decades. Three theoretical frameworks will guide this review: the Structuralism approach, which emphasizes the role of economic and social structures in perpetuating poverty and inequality; the Human Capital approach, which highlights the importance of education and skill development as tools for poverty alleviation; and the Capability approach, which focuses on expanding individual freedoms and opportunities as a central aspect of development.

To achieve this, the works of influential scholars such as Thomas Piketty, David Hulme, Celso Furtado, Gary Becker, and Amartya Sen will be explored, aiming to identify the key theoretical frameworks that policymakers in Mexico and Brazil have applied in shaping their policies and programs, including Bolsa Família in Brazil and Prospera in Mexico, to address socio-economic disparities. However, before delving into the detailed analysis of each approach, it is essential to first highlight the most comprehensive and nuanced definitions of poverty and income inequality found within this literature.

In his work, David Hulme (2010) provides a nuanced understanding of poverty, viewing it as a multidimensional issue that goes beyond income deprivation. He emphasizes that poverty is not simply the lack of financial resources but also a lack of access to the means necessary for a decent standard of living, such as education, healthcare, and adequate living conditions. Hulme argues that the failure of global governance structures to address these various aspects of poverty is a significant factor in the persistence of poverty worldwide. He points out that poverty must be understood not just as a deficiency of material resources but also in terms of the social and economic structures that limit opportunities for individuals and communities to thrive. This broader view allows policymakers to design more inclusive and comprehensive poverty alleviation strategies.

On the other hand, in the context of this thesis, inequality is understood both in terms of economic structures and individual freedoms. Amartya Sen (1999), defines inequality through the Capability Approach, emphasizing the deprivation of opportunities and freedoms necessary for individuals to lead lives they value. This view suggests that inequality is not just about income or wealth but also about people's ability to access opportunities and exercise their capabilities. This approach shifts the focus of inequality from mere financial disparity to a broader consideration of

social justice and human well-being, which has important implications for policy design in countries like Mexico and Brazil.

To complement Amartya Sen's analysis, it is important to consider the work of Thomas Piketty (2014), who, in contrast, defines inequality as the disparity in income and wealth distribution within capitalist economies *(r > g)*, where the returns on capital *(r)* (such as investments and property) tends to exceed the growth of labour income *(g)* (wages and salaries), leading to an increasing concentration of wealth and deepening income inequality. Together, these definitions offer a comprehensive understanding of inequality, integrating both human capabilities and the economic structures that shape income distribution.

I.II.I. Typologies of Social Policies and Programs under Study

The previous analysis highlights the need to narrow the scope of this research in terms of which programs and policies should be examined. Consequently, this study focuses on public policies and social programs specifically in the areas of education and conditional cash transfers (CCTs), aimed at reducing poverty and income inequality. In both Mexico and Brazil, education has long been recognized as a crucial tool for breaking intergenerational cycles of poverty. However, persistent challenges—such as limited access in rural areas, unequal quality across socio-economic groups, and structural barriers to educational attainment—continue to hinder its transformative potential.

Alongside education, CCTs have emerged as one of the most influential social policy innovations in Latin America over the past three decades. Programs such as Mexico's Prospera (formerly Oportunidades and Progresa) and Brazil's Bolsa Família have become emblematic of a new generation of anti-poverty strategies that combine short-term income support with long-term human capital investment. These programs typically provide cash payments to low-income households on the condition that children attend school regularly and family members engage in basic health services. The rationale is to address both the immediate material needs of poor households and the structural causes of poverty through education and health improvements.

These programs reflect a broader distinction in social policy design between active and passive measures. Active social policies—such as CCTs and certain education and training initiatives—require or encourage behaviours that promote long-term self-sufficiency, such as attending school, participating in vocational training, or engaging in the formal labour market. In contrast, passive policies provide income support or subsidies without conditioning benefits on

recipients' actions. While passive policies play an essential role in alleviating extreme deprivation and protecting the most vulnerable, active policies are often seen as more transformative in nature, aiming to reduce structural dependency and foster social mobility (The World Bank, 2018).

The focus on education and CCTs in this dissertation arises from their central role in both countries' strategies to combat poverty and promote social inclusion. These policy areas not only reflect national priorities but also provide valuable insights into how political ideology, institutional capacity, and socio-economic context shape the formulation, expansion, and sustainability of social programs. Moreover, the long-standing implementation of these programs and the availability of data make them ideal for assessing how different theoretical approaches—such as structuralism, human capital, and capability—translate into policy outcomes.

I.II. II. Structuralism Approach

The structuralist approach has long been influential in Latin American development studies, emphasizing that poverty and inequality are not merely the result of individual circumstances or policy failures, but are deeply embedded in the historical and economic structures of underdeveloped nations. Scholars such as Celso Furtado (1964) argue that Latin America's development has been shaped by its peripheral position in the global capitalist system—a position established through colonialism and maintained through patterns of unequal trade and dependency. In Development and Underdevelopment, Furtado contends that this global economic structure restricts the autonomy of domestic development strategies and reproduces inequality across generations.

Building on this structuralist foundation, David Hulme reinforces the idea that global poverty is a systemic issue. *In Global Poverty: How Global Governance is Failing the Poor* (Hulme, 2010, p. 65), he outlines three major ideological positions on the causes of poverty

- *"Global poverty is caused (or mainly caused) by a lack of economic growth because markets are constrained by state action and/or poor governance.*
- *Global poverty is caused by contemporary capitalism, globalization and socio-economic inequality.*
- *Global poverty is caused by a lack of growth in poor countries (because of lack of access to finance and technology) and a lack of compassion (charity, morality, fairness) in rich countries. Both the market and the state, in rich and poor countries, are jointly responsible".*

While Hulme does not endorse a single viewpoint, his conclusions align most closely with the third perspective, which emphasizes both structural economic constraints and the ethical responsibilities of wealthier nations. He critiques the limitations of both market-driven and state-centred approaches and calls for a holistic, globally coordinated response to poverty—one that addresses deep-rooted inequalities rather than relying solely on short-term solutions.

In a similar structuralist perspective, Thomas Piketty´s Capital in the Twenty-First Century (2014) offers a compelling macroeconomic framework for understanding inequality. Although Piketty does not focus on specific public policies or programs, his central argument—that the rate of return on capital (r) tends to exceed the rate of economic growth (g), leading to the concentration of wealth ($r > g$)—highlights the structural forces behind persistent inequality. In countries like Mexico and Brazil, where a small elite captures a disproportionate share of capital income, this dynamic exacerbates income and wealth disparities. As a result, the broader population experiences stagnant wages, weak social mobility, and limited access to quality public services.

This structuralist literature is crucial for critically evaluating the design and impact of public education policies and Conditional Cash Transfer (CCT) programs, such as Bolsa Família in Brazil and Oportunidades/Prospera in Mexico. While these programs provide essential short-term support to low-income families—by offering cash incentives for school attendance and healthcare checkups— they do not, in themselves, dismantle the underlying economic and institutional structures that reproduce poverty and inequality. For instance, persistent regional disparities in education quality, limited access to higher education, and labour market segmentations such as formal vs. informal employment and urban vs. rural opportunities continue to limit the transformative potential of such policies.

Therefore, the structuralist perspective urges scholars and policymakers to move beyond compensatory measures and address the root causes of both issues. This includes investing in equitable and high-quality public education and challenging the global economic arrangements that constrain national policy autonomy. Without structural reforms, education and CCT programs risk serving as palliative responses rather than transformative tools for long-term development.

Despite its important insights, the Structuralism Approach has been criticized for its somewhat deterministic view, which tends to emphasize external dependency and global economic structures at the expense of recognizing the potential for domestic agency and policy innovation. Critics argue that by focusing heavily on historical patterns of colonialism and global capitalism, Structuralism may underestimate the role of national governments, political will, and internal social

dynamics in shaping development outcomes (Kay, 2002). This deterministic framing may limit the approach's practical guidance for policy design, particularly for targeted interventions like education reforms and social programs, which require nuanced, context-specific strategies to overcome structural barriers. Consequently, while Structuralism rightly highlights systemic constraints, it risks overlooking how well-designed public policies and inclusive institutions can leverage local capacities to promote change despite these constraints.

I.II.III. Human Capital Approach

The Human Capital approach, most famously advanced by Gary S. Becker in *Human Capital: A Theoretical and Empirical Analysis with Special Reference to Education* (1993) provides a foundational framework for understanding how investments in education and skills contribute to individual and national economic growth. According to Becker, human capital refers to the knowledge, skills, and health that individuals accumulate through education, training, and experience—investments that increase productivity and, consequently, earnings. As Becker explains:

"Consequently, it is fully in keeping with the capital concept as traditionally defined to say that expenditures on education, training, medical care, etc., are investments in capital. However, these produce human, not physical or financial, capital because you cannot separate a person from his or her knowledge, skills, health, or values the way it is possible to move financial and physical assets while the owner stays out." (Becker, 1993, p. 16)

Becker's work reframes education not merely as a social good, but as a form of capital investment, crucial for enhancing individual productivity and, by extension, economic development. In his analysis, he emphasizes that more highly educated and skilled individuals almost always tend to earn more than others, highlighting that inequality in the distribution of income is generally linked to disparities in access to education and training. This conceptualization of education as an investment in human capital has profoundly influenced policy thinking in Latin America. In particular, Mexico and Brazil have drawn on this logic to design and implement large-scale social programs—such as conditional cash transfers (CCTs) and public education initiatives—that aim to expand educational access among disadvantaged populations and disrupt the intergenerational transmission of poverty.

Broadening on the above, Conditional cash transfer (CCT) programs, such as Mexico's Oportunidades/Prospera and Brazil's Bolsa Família, are deeply rooted in the logic of the human

capital approach. These programs provide direct financial support to low-income families, as long as their children attending school and receiving regular health check-ups. The underlying assumption is that poverty can be reduced in the long run by encouraging behaviours that accumulate human capital. In this context, education is considered a primary means for economic mobility. By targeting structural barriers to schooling—such as the opportunity cost of sending children to school rather than having them working—CCTs aim to make long-term investments in human capital that benefit not only individuals but also the broader economy (IDB, 2016). Becker's model supports this rationale by empirically demonstrating how returns to education increase with higher levels of schooling, particularly when supported by complementary investments such as nutrition and healthcare.

In conclusion, Becker's theory provides a powerful framework for understanding the evolution of education and CCT policies in Mexico and Brazil over the past twenty years. These programs reflect a policy shift that views education not only as a right but as an economic investment crucial for long-term poverty reduction and income inequality mitigation. The human capital approach has clearly shaped the way both countries have addressed social vulnerability and economic development through public policy.

However, several critiques of the human capital approach point out that it often overlooks the broader socioeconomic structures that influence educational outcomes and access to labour markets. Simon Marginson (2017) argues that human capital theory relies on a simplistic, single-pathway model—asserting that education automatically increases productivity and earnings—while underestimating factors like social background, status, and structural barriers. In deeply unequal societies such as Mexico and Brazil, investing in education alone is not always sufficient to eradicate poverty or reduce income inequality—particularly when labour markets remain segmented and discriminatory toward historically marginalized populations.

In Mexico, roughly 21% of the population belongs to marginalized ethnic groups, with 19% identifying as Indigenous and around 2% as Afro-Mexican (INEGI, 2020). These groups continue to face systemic barriers to both education and economic mobility. In Brazil, structural inequality is even more racialized: approximately 9% of the population identifies as Black and 43% as Pardo (mixed race), meaning that over half of the population—around 52%—belongs to racial groups that have historically been excluded from full participation in educational and economic systems (IBGE, 2024).

Despites its limitations, the human capital theory remains a central pillar in the design of education and social protection policies in Latin America, providing a strong economic justification for public investments in education and conditional transfer schemes. Furthermore, international organizations such as the World Bank and the Inter-American Development Bank (IDB), which have supported and evaluated CCTs in both countries, have also framed their recommendations through the lens of human capital accumulation (World Bank, 2003); (IDB, 2016).

I.II. IV. Capability Approach

The Capability Approach that was addressed for the first time by Amartya Sen (1999), redefines the goals of Human development by emphasizing the expansion of individuals' real freedoms—what people are effectively able to do and to be—rather than merely focusing on economic growth or income. For Sen, poverty is not just the lack of income but a deprivation of basic capabilities, such as being able to live a long and healthy life, access education, and participate in the life of a community. In his words:

"Development consists of the removal of various types of unfreedoms that leave people with little choice and little opportunity of exercising their reasoned agency" (Sen, Development as Freedom, p. xii). Although Sen´s perspective does not deny that low income is clearly one of the major causes of poverty, since *"the lack of income can be a principal reason for a person´s capability deprivation"* (Sen, Development as Freedom, p. 87) in his approach he promotes the concept of poverty beyond the merely traditional relationship of making money (Sen, pp. 87-88):

- *"Poverty can be sensible identified in terms of capability deprivation; the approach concentrates on deprivations that are intrinsically important (unlike low income, which is only instrumentally significant)"*
- *"There are influences on capability deprivation—and thus on real poverty—other than lowness of income (income is not the only instrument in generating capabilities)"*
- *"The instrumental relation between low income and low capability is variable between different communities and even between different families and different individuals (the impact of income on capabilities is contingent and conditional)"*

This theoretical shift has profoundly influenced policy discourses by reshaping how poverty and inequality are understood and addressed—particularly in developing regions such as Latin America, where these issues are deeply rooted and multidimensional. It has encouraged a move away from purely income-based measures toward a broader focus on expanding human

capabilities and freedoms, ultimately contributing to more holistic policy frameworks and evaluation tools, such as the Human Development Index (HDI)[6], which operationalizes key aspects of this approach.

In contrast to the human capital approach, which often frames education as a tool for improving productivity and labour market outcomes, the Capability Approach views education and health as ends in themselves, essential to human dignity, autonomy, and agency. This intrinsic value places a moral obligation on public policy: to ensure individuals can develop their capabilities regardless of their socioeconomic background. In highly unequal societies like Mexico and Brazil, this perspective is particularly relevant, as large segments of the population—especially Indigenous, Afro-descendant, and poor rural communities—have historically been excluded from accessing basic services and opportunities.

Empirical evidence of this approach is visible in the design of Conditional Cash Transfer (CCT) programs such as Bolsa Família in Brazil and Prospera in Mexico. While these programs are often interpreted through a human capital lens, aiming to improve education and health outcomes as investments in future productivity, they also implicitly align with the Capability Approach by expanding poor households' access to fundamental capabilities. For instance, conditionalities that require school attendance and health check-ups aim to break the intergenerational transmission of poverty not just economically, but also by enhancing individuals' real freedoms to live healthier and more educated lives. However, Sen's approach also points to the limitations of such programs when they do not sufficiently challenge the deep inequalities in access to capabilities. Both countries face challenges in fully implementing the Capability Approach, as inequalities in political, social, and economic spheres can limit the expansion of freedoms for marginalized populations.

While the Capability Approach has significantly influenced the design and evaluation of social policies—particularly by promoting people-centred interventions tailored to individuals' values—it is not without limitations. Several scholars have pointed out that, despite its normative strength, the approach faces challenges in empirical implementation. For instance, Robeyns (2005) argues that the lack of a definitive list of capabilities and the conceptual breadth of the framework make it difficult to operationalize consistently in policy evaluation. Moreover, Sen himself acknowledged

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[6] The Human Development Index (HDI) is a composite statistic measuring average achievement in three basic dimensions of human development: health (life expectancy at birth), education (mean and expected years of schooling), and standard of living (gross national income per capita). It was developed by the United Nations Development Programme (UNDP) to provide a broader understanding of well-being beyond income alone. (United Nations Development Programme (2023))

that the Capability Approach mainly addresses the opportunity aspect of justice, while procedural fairness and institutional structures must also be considered (Sen, 2002).

These critiques are particularly relevant in Latin America, where the failure of many social programs can be attributed not only to poor design but also to the neglect of deeper structural and institutional inequalities. Nonetheless, the Capability Approach provides a compelling normative framework for evaluating the evolution and fairness of social programs. It encourages policymakers to look beyond income metrics and consider whether individuals and communities can actually live the kinds of lives they value. In doing so, it serves as a crucial complement to economic-centred frameworks, highlighting the ethical dimensions of development and the importance of addressing structural inequalities alongside material poverty.

With the discussion of the Capability Approach, this literature review concludes the analysis of the three main theoretical frameworks considered in this thesis, that have supported the evolution of public policies and social programs targeting education and poverty. As a final consideration, this review highlights how the Structuralist, Human Capital, and Capability Approaches have each contributed to shaping the design and development of social policies in Mexico and Brazil. While each framework offers a distinct perspective on how policymakers have sought to reduce poverty and income inequality, the long-term sustainability and effective evolution of these policies continue to face significant challenges. These include persistent structural constraints, insufficient investment in human capital, and limited expansion of individual capabilities—particularly among marginalized populations. These tensions underscore the complex and multidimensional nature of addressing poverty and inequality, pointing to the need for integrated policy solutions that combine individual empowerment with broader systemic transformation.

I.II.V. Conditional Cash Transfer programs CCTs

To conclude the literature review, it is essential to include a focused discussion on the theoretical underpinnings of conditional cash transfer (CCT) programs. This program is considered under the category of "the social safety net (SSN)/social assistance (SA) programs, which are non-contributory interventions that are designed to help individuals and households cope with chronic poverty, destitution, and vulnerability. Potential beneficiaries are not required to pay a premium (contribute) to access benefits. SSN/ SA programs target the poor and vulnerable" (The World Bank, 2018, p. 94).

Introduced in 1997 during the administration of President Ernesto Zedillo, Mexico's Progresa represented a novel and transformative approach to poverty alleviation. Its success has had a significant influence on social policy globally, inspiring the adoption of similar programs in over twenty developing countries, each adapted to its specific institutional and socioeconomic context. A key contribution to the understanding of this policy innovation is Santiago Levy's seminal work Progress Against Poverty: Sustaining Mexico's Progresa-Oportunidades Program (2006), which offers a comprehensive account of one of the most influential social programs in the region.

Levy's analysis goes beyond the program's operational design to examine the deeper political economy and institutional factors that have enabled Progresa-Oportunidades to scale nationally and achieve long-term sustainability. Economically, the program marked a shift from generalized subsidies and fragmented social spending toward a more efficient, targeted model focused on conditional cash transfers (CCTs). It was explicitly designed to address the intergenerational transmission of poverty by investing in human capital—primarily through improved access to education, health care, and nutrition for poor families. This design was grounded in rigorous empirical evaluation and evidence-based policymaking, establishing a new benchmark for social program design in the region.

Politically, Progresa-Oportunidades succeeded in part because of its technocratic foundations and relatively depoliticized implementation. Levy highlights how program architects deliberately shielded it from clientelistic manipulation by rooting it in transparent eligibility criteria, independent evaluations, and a centralized management structure. The program received bipartisan support, which contributed to its continuity across multiple administrations—including transitions between political parties. This political resilience reflects a broader institutional commitment to poverty reduction, built through policy credibility, social legitimacy, and the strategic framing of the program as a long-term investment in national development.

Institutionally, Progresa-Oportunidades benefited from a strong administrative infrastructure and a culture of ongoing monitoring and evaluation. The integration of data systems, conditionality tracking, and impact assessments enabled continuous improvements and policy learning, reinforcing the program's effectiveness and accountability. These institutional innovations became part of the program's legacy, influencing both domestic policy development and international adoption of similar CCT models.

The success of Progresa-Oportunidades deeply influenced the design and implementation of Brazil's Bolsa Família, launched in 2003 as a consolidation of several pre-existing social

programs. While adapted to Brazil's specific federal structure and political context, Bolsa Família retained many of the core principles pioneered in Mexico, including targeted transfers linked to school attendance and health checkups, as well as an emphasis on transparency and evaluation. However, Brazil's model also introduced innovations, such as stronger integration with local governments and expanded coverage through simplified eligibility criteria (Centre for Public Impact, 2019). The diffusion of the CCT model across Latin America—particularly from Mexico to Brazil—illustrates how successful policy frameworks can be contextually adapted while preserving core normative goals: reducing poverty, enhancing social inclusion, and promoting human development through investment in capabilities.

In this way, both programs exemplify how coherent economic rationale, institutional strength, and sustained political commitment can converge to shape transformative and enduring public policies. The comparative experiences of Progresa-Oportunidades and Bolsa Família offer valuable insights into how structural, human capital, and capability-based approaches interact in practice, reinforcing the importance of multidimensional frameworks in both policy design and evaluation. These lessons form a crucial foundation for understanding the evolution and effectiveness of anti-poverty strategies in Latin America and will serve as a key point of reference in the empirical analysis that follows.

II. METHODOLOGY

As was mentioned in the introduction, the methodology that will be implemented to achieve the goals of this study and to answer the research question, involves a mixed-methods approach, combining a *comparative case study* and *process tracing analysis*. The idea of using these two methods is to combine quantitative data with qualitative document analysis. Data will be sourced from governmental reports, international organizations, and academic literature. Additionally, the study will involve the examination of public documents and two interviews with policymakers-experts, one per each country to gain further insights into the real-world implications of policy design, the evolution of specific programs, and the obstacles encountered.

In the following two sections, the theoretical part of the methodology will be described, and the justification of its suitability and application plan will be addressed including the descriptions of the main units and variables to be considered under each case of the study.

II.I. Comparative Case Study

Comparative analysis is a research methodology mainly used in social sciences to understand social phenomena and establish relationships between variables and outcomes. In this sense, there are three main approaches within comparative analysis: the experimental method, the statistical method and the comparative method (Porta, 2008). It is important to mention that the experimental method has little application in social sciences, because it controls variables in an artificial setting and only a limited number of social phenomena can be studied in this way. Likewise, the statistical method or the variable-oriented will not be the main approach for this research due to the justification will be given forward, because of that, this section focuses on the explanation of comparative methods, which can also be called case-oriented analysis.

As observed by Porta (2008, p. 198) "Variable-oriented studies mainly aim at establishing generalized relationships between variables, while case-oriented research seeks to understand complex units". Given that, variable-oriented studies observe a large number of cases on a few characteristics, through statistical analyses. The goal is to look at concomitant variations, that is, variables that affect one another causally, in order to identify causal explanations. In this sense, "explanation is understood as measuring the different variables' contributions to causing a certain phenomenon" (Porta, 2008, p. 207)

On the other hand, case-oriented studies seek in-depth understanding of complex units. Therefore, it studies a few cases in depth, looking at a large number of variables, usually from a historical perspective. It is a strategy that can be, thus, associated with Weber's historical comparison approach (Porta, 2008, p. 203). Rather than looking for statistical regularities among anonymous cases, case-oriented studies see each case as a complex set of relationships and are interested in exploring diversity, by pointing out similarities and differences and studying even deviant cases. Additionally, in this approach, there is Eventful Temporality Analysis, which focuses on significant historical events and their transformative impacts.

Likewise, in a case-oriented study, it is possible, for instance, to grasp how different variables interact with long-lasting processes. Thus, case-oriented studies are more useful when the purpose of research is hypothesis generating rather than hypothesis testing. Afterwards, concepts are constructed in the course of such analysis, rather than predefined, as happens in variable-oriented studies.

Finally, as highlighted by Porta (2008, p. 202)The comparative method or case-oriented study is the only choice for studying cases that are too few for statistical analysis typically ranging from 2 to 10. However, it is also important in the study of institutions and macro political phenomena, because of "its capacity to go beyond descriptive statistical measures, towards an in-depth understanding of historical processes and individual motivations".

II.II. Process Tracing

Process tracing is a research method used in many case studies with the intention of identifying causal processes and mechanisms, that is, to explore the processes that connect initial conditions to a particular outcome. According to Vennesson (2008), the process tracing approach aims to uncover the relations between possible causes and observed outcomes. As a result, it involves the detailed and systematic tracking of the sequence of events, decisions or actions that lead to a particular outcome within a case. In other words, it allows researchers to grasp the causal mechanism that links the independent and dependent variables.

By examining the steps and evidence involved in the process, researchers seek to uncover the "how" and "why" behind observed outcomes, testing hypotheses and evaluating alternative explanations. The analysis bridges positivist and interpretivist approaches, noting that while positivist process tracing aims to identify and evaluate causal links between variables, interpretivist process tracing also seeks to understand how it happened, investigating for instance the context and subjective motivations behind actions.

To clarify, by identifying and linking variables through evidence like historical documents and interviews, positivist process tracing examines the validity of causal claims. In contrast, interpretivist process tracing also explores how and why these links manifest, focusing on the actors' beliefs, perceptions, and motivations, thus making space for a nuanced examination of the "why" and "how."

Rohlfing (2012) reinforces that process tracing involves identifying and examining sequences of events, or causal process observations (CPOs), that connect causes to outcomes within a particular context. Moreover, he highlights that each step of this causal chain is posited according to its temporal order and causal influence. Given that, process tracing helps researchers observe how a causal mechanism operates over time, allowing them to develop a detailed narrative that links specific factors or events to a given outcome.

Finally, as explained by Hall (2008), process tracing or systematic process analysis is a research technique that involves the detailed exploration of a small number of cases to understand not only the outcomes but also their causes, allowing a better interpretation of how and why certain factors lead to a result. It is indispensable, for instance, in cases in which causal chains are too complex to be fully grasped by a statistical analysis or when the literature suggests different causal processes to explain the same phenomenon.

As it was already mentioned in the introduction, one of the main goals in this study is to investigate what were the key causal mechanisms that influenced the implementation and outcomes of the most remarkable programs and policies aimed at reducing income inequality and poverty in Mexico and Brazil, thus, in the next section the suitability of the methodology will be developed in detail.

II.III. Justification of the suitability of the methods

Case study analysis

Among the several existing methods for researching, the case study analysis was chosen to achieve the goals of this research, since this methodology examines two or more cases in depth to identify patterns, differences, and generalizable insights. It also allows investigation within cases and cross-cases. Thus, its focus will be on understanding the evolution of public policies and social programs aimed at reducing income inequality and poverty in two countries, Mexico and Brazil, which are considered *the cases* and as *complex units*.

Also, the study will delve into the main similarities and differences between and within the two countries relative to the design, implementation and outcomes of those programs and policies. It is important to note that both countries have a federal political system, meaning that unlike a centralized power, each state has a certain autonomy to develop the policies and programs that are the subject of this research, thus, this feature could change the outcome of the same measure.

Considering the above, the case-oriented approach is very suitable, since it looks at the context, respects the historical specificity of each unit/case and allows causal complexity. Likewise, a comparative case study facilitates within cases and cross-case analysis, enabling the identification of shared patterns and diverging strategies. In the same way, it provides an

opportunity to explore how context-specific factors, such as political will and institutional capacity, influence policy effectiveness.

Brazil and Mexico are appropriate cases for comparison because both countries have the same political system, also they are large Latin American economies with high levels of inequality and poverty. However, significant efforts to reduce them through policies and social programs in the study period need to be recognized. For instance, in Brazil have been implemented measures as, Bolsa Família Program (BFP), Zero Hunger Program[7], minimum wage increases growing by over 70% between 2003 and 2023 (Economy, Brazil, 2025), ProUni-University for All[8] among others.

Likewise, in Mexico have been implemented policies such as, Oportunidades/Prospera/Bienestar, minimum wage Increases by over 70% between 2003 and 2023 (Economy, Mexico, 2025), "*Pensión para el Bienestar de los Adultos Mayores[9]*" and "*Jóvenes Construyendo el Futuro[10]*" among the most remarkable ones during the last two decades. Additionally of these programs and policies, in both countries important structural reforms in health, labour conditions, living standards, and social security were developed in order to reduce the income inequality and poverty ratios that will be considered under the analysis of this study.

On the other hand, despite sharing similar goals and policy measures, the two countries differ in their political systems. In Mexico the political culture favors centralized power in the executive branch, with significant influence over critical policy areas such as education, health, and social programs and the budget (BTI 2024 Country Report — Mexico). While in Brazil power is more decentralized, with strong states and municipalities playing critical roles in governance. Therefore, local governments administer education, healthcare, and welfare programs (BTI 2024 Country Report — Brazil). Regarding the approaches to poverty reduction something similar happens, Mexico's centralized poverty programs rely heavily on federal control, while Brazil's decentralized model empowers states and municipalities to implement welfare programs locally. These

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[7] A comprehensive strategy to eliminate hunger, including food distribution, support for small-scale agriculture, and better nutrition policies

[8] A program that provides scholarships for low-income students in private universities.

[9] Which has as main goal to provide non-contributory pensions to elderly citizens, regardless of prior formal employment.

[10] Program that aims to provide job training and stipends to young people who are neither studying nor employed (known as ninis)

differences which provide rich material for the case study analysis will be further explored in the section on demographic and socio-economic contexts.

In conclusion, the comparative case study method enables a deep identification of lessons learned from Brazil and Mexico's experiences that can inform policymaking in other emerging economies. It provides opportunities to generalize findings, such as the evolution of conditional cash transfers or the role of institutional capacity, to broader contexts. It supports the research objective of comparing and contrasting the evolution of policies in Brazil and Mexico to draw meaningful conclusions; by combining within-case and cross-case analysis, it provides a holistic view of policy impacts.

Process tracing

Since poverty and income inequality are influenced by a wide range of interconnected factors, including economic conditions, political decisions, institutional capacities, and societal dynamics. Therefore, this methodology is ideal for investigating the causal mechanisms by examining the sequence of events and decisions; it identifies how and why specific public policies (e.g., Bolsa Família, Progresa/Oportunidades) led to certain outcomes.

Likewise, since the research requires understanding not just the outcomes of policies but how they were designed, implemented, and adapted over time. Process tracing is suitable because it allows for a historical and contextual examination of the programs in Brazil and Mexico during the last two decades, and it provides insights into the context-specific factors, such as structural challenges (e.g., corruption, regional disparities), social and economic conditions that influenced policy choices and their evolution.

In conclusion the method aligns with the research's goal of understanding how and why specific policies and programs influenced poverty and inequality outcomes by examining the step-by-step progression of them highlighting the causal pathways that led to their ongoing application or their cancellation.

As a conclusion of this section, it is important to mention that the combination of Process Tracing and Comparative Case Study is particularly powerful for this research because while process tracing provides a detailed understanding of how specific policies worked within each country, comparative case study situates these findings within a broader regional and international context. Thus, using both methods combines the strengths of in-depth causal analysis with

broader cross-country comparisons. This dual approach will provide detailed insights into the mechanisms behind public policies in Brazil and Mexico and a framework for understanding their broader implications for poverty and income inequality reduction globally.

II.IV. Application of the methods

To apply the selected methods, each case—Mexico and Brazil—was examined individually through process-tracing analysis. This approach aimed to identify the main characteristics and causal mechanisms underlying each government's policy approach and design over the past twenty years. The research primarily focused on tracing the evolution of conditional cash transfer (CCT) programs and key reforms in the education system, considering the typology of policies discussed in the literature review.

This stage also identifies how these initiatives functioned, detailing their design, implementation, and measurable outcomes. By tracing these causal pathways, the study aims to uncover the direct and indirect effects of targeted interventions. In addition to examining domestic policies, the analysis incorporated external explanations by assessing the influence of broader factors, such as globalization and global economic growth trends. This broader perspective helped contextualize the observed changes in poverty and income inequality, identifying the extent to which external forces may have contributed to or hindered national efforts.

Once the scope of the analyses was given by the previous process, the comparative case study application began by focusing on the identified public policies and social programs designed to address poverty and income inequality in both countries for the study period. This timeframe allows for an in-depth examination of the strategies implemented, capturing the evolution of the initiatives within the broader socio-economic and political contexts of both cases. By concentrating on these themes, the study aims to provide a comprehensive understanding of how each country has sought to mitigate poverty and inequality through targeted measures.

To ensure a systematic and rigorous analysis under the methodology of comparative case-study approach, an analytical framework was developed to investigate the selected policies and programs. This framework includes criteria such as the design of the interventions, the processes underlying their implementation, the outcomes they achieved, and the challenges they faced. By using this structured approach, the study facilitates a thorough assessment, providing

comparations between the two countries and a basis for evaluating the evolution of the interventions and identifying key factors influencing their success or limitations.

To explore the evolution of these policies and measures, the data collection process combines qualitative sources such as policy documents, government reports, program evaluations, and legislative records. These sources provide insights into the development and operation of the initiatives under review. Additionally, interviews with one policymaker from each country offer first-hand perspectives and contextual depth. To enhance the credibility of the findings, a triangulation approach has been employed, ensuring that data from different sources converge to provide a comprehensive understanding of the policy landscape.

Once the data was gathered, comparative analysis was conducted both within and between the two countries. This comparison identifies similarities and differences in the policies and programs, as well as the factors contributing to their continuity or ending. By examining these aspects, the study aims to uncover patterns and insights that can inform the development of more effective poverty and income inequality reduction strategies.

Finally, the last step of this analysis was to synthesize its findings to draw meaningful conclusions about the key actors, processes, and rationales behind the continuation, transformation, or cancellation of these specific policies and programs. By integrating these insights, the research provides a nuanced understanding of how and why certain measures succeeded or failed in addressing poverty and income inequality in Brazil and Mexico over the past two decades. Additionally, the study highlights the broader implications of its findings for policymaking in other emerging economies. By situating the results within a global context, the research aims to offer valuable lessons and recommendations that can guide future efforts to tackle poverty and inequality in similar socio-economic settings.

The subsequent sections present the application of the methodology described above.

III. RESULTS

One of the main reasons these two countries were chosen for this research is their political and socio-economic similarities. The first part of this section will outline the key features and statistics related to these aspects for both countries. It will also include demographic data, along with information on inequality and poverty rates. The second part will provide a summary of the main characteristics of the governments under analysis in each country.

III.I. Demographic and socio-economic context

Mexico and Brazil are both federal presidential republics, though Mexico's presidents serve six-year terms, Brazil's presidents have four-year terms. Mexico is divided into 32 federal entities, including 31 states and Mexico City, the country has also 2.470 municipalities, whereas Brazil consists of 26 states plus the Federal District, Brasília and 5.571 municipalities. In terms of population, data from world bank (2023) reveals that Mexico has approximately 129 million people, while Brazil is significantly larger, with around 211 million inhabitants.

The largest cities in Mexico are Mexico City, Guadalajara, and Monterrey, reflecting major urban centers across the country. Brazil's most populous cities include São Paulo, Rio de Janeiro, and the capital, Brasília. When looking at ethnicity and demographics, Mexico's population is predominantly Mestizo, a mix of Indigenous and European ancestry, with a notable Indigenous population of about 7 million and smaller Afro-Mexican communities (INEGI, 2020). Brazil, on the other hand, is highly diverse, with roughly 48% identifying as White, 43% as mixed-race, 9% as Black, and smaller Indigenous and Asian minorities (IBGE, 2024).

In terms of inequality, both countries face significant challenges. Mexico's Gini coefficient, a common measure of income inequality, stands at 0.43, while Brazil's is higher at 0.52, indicating greater inequality. Poverty levels are also substantial, with 27% of Mexico's population living below the $8.30-a-day threshold[11], compared to 23% in Brazil (World Bank, 2025), highlighting ongoing social and economic challenges in both nations. Both Mexico and Brazil are classified as upper-middle income countries by the World Bank. Therefore, the $8.30/day line (which is replacing the $6.85/day) is the most used benchmark to assess poverty in international comparisons.

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[11] The World Bank defines a higher poverty line of $8.30; this is the typical poverty line of upper-middle-income countries. A growing majority of the world's population live in middle-income countries (for example, about three-quarters in 2024 compared to one-quarter in 1990), so a higher poverty line would be more representative of the word's current demographic structure.

Both Mexico and Brazil have a centralized framework for designing and funding social policies, meaning the federal government sets the main rules, eligibility criteria, and finances for social programs. However, the implementation is decentralized: state and municipal governments are responsible for adapting these programs to local needs and delivering services. In Mexico, federal funds are often routed through state governments, which can add an extra layer of bureaucracy and lead to potential inefficiencies. In contrast, Brazil's municipalities receive federal funding directly, especially for key social programs like Bolsa Família.

When it comes to administrative capacity and regional disparities, wealthier regions in both countries tend to implement social policies more effectively than poorer areas. Brazil shows stronger municipal involvement in policy implementation, whereas Mexico's system continues to rely heavily on federal oversight.

The following images illustrate poverty levels in each country, displayed as percentage ranges. In Mexico, the highest concentrations of poverty are clearly found in the south-southeast, with some municipalities — such as San Juan Cancuc in the state of Chiapas — reaching poverty rates as high as 99.4% (CONEVAL, 2020)

Figure 3.1 Percentage of the population living in poverty, by municipality, Mexico
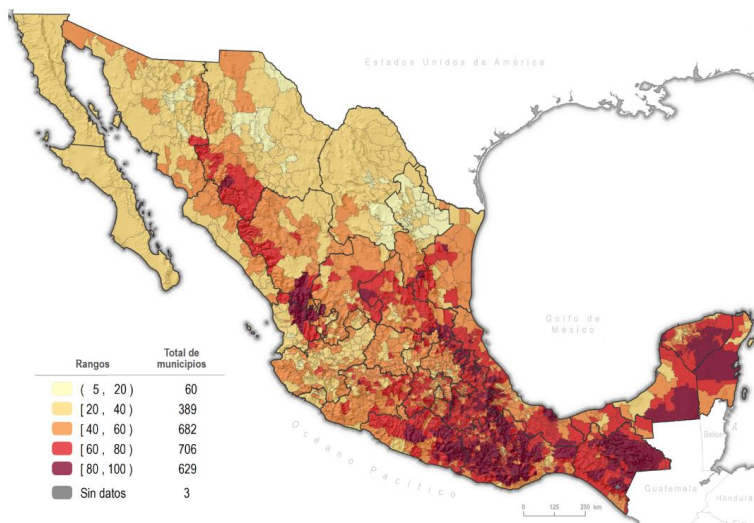
Source: (Coneval, 2020)

In Brazil, poverty is most heavily concentrated in the northern region, with the highest ranges observed in the state of Amazonas. According to data from the Brazilian Institute of Geography and Statistics (IBGE, 2024), the Vale do Rio Purus region in Amazonas recorded the highest proportion of people living below the poverty line in Brazil, at 66.6%.

Figure 3.2 Percentage of the population living in poverty, by strata, Brazil
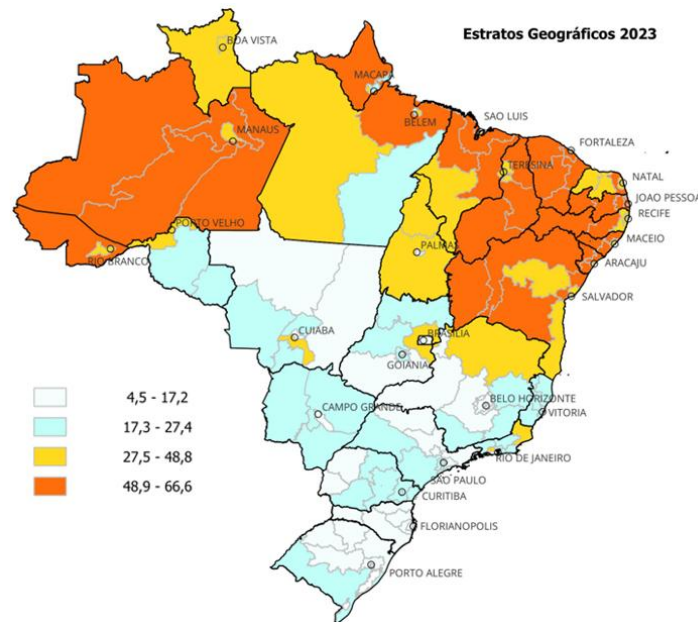
Source: (Instituto Brasileiro de Geografia e Estatística, 2024)

The extreme poverty observed in both Vale do Rio Purus (Brazil) and San Juan Cancuc (Mexico) reflects the intersection of geographic isolation, historic marginalization of Indigenous populations, limited state capacity, and a subsistence-based economy with low access to education, healthcare, and market opportunities — all of which perpetuate multidimensional poverty in these territories.

As mentioned in the introduction, this study focuses on the past two decades. In the case of Mexico, the analysis begins with Vicente Fox's administration in 2000 and concludes with the government of Andrés Manuel López Obrador (AMLO) in 2024. In Brazil, the study starts with Luiz Inácio Lula da Silva's first term in 2003 and extends to his current administration, which began in 2023.

The next sections outline how each government's political orientation shaped social policy design. In both countries, left-leaning governments expanded social assistance and redistribution, while right-leaning or centrist ones prioritized fiscal discipline, sometimes sacrificing equity. The analysis highlights that political commitment is key to sustaining poverty and income inequality reduction efforts, but these policies remain vulnerable during economic or political crises.

III.II. Key Characteristics of Mexican Governments under Analysis

From 2000 to 2024, Mexico has experienced significant political transitions that reflect shifting priorities in social and economic policy. The two presidencies from the right-wing National Action Party (PAN) —Vicente Fox (2000–2006), the first non-Institutional Revolutionary Party (PRI) president after 71 years of PRI dominance[12], and Felipe Calderón (2006–2012)—were characterized by neoliberal, market-oriented policies, a preference for foreign investment, and reduced state intervention. Although some social programs were maintained during this period such as Oportunidades/Prospera, the focus on security — particularly Calderón's so-called "War on Drugs" — overshadowed substantial investment in social development, leading to widespread violence and serious security challenges (Redmond).

The wave of violence and insecurity contributed to the return of the PRI with the election of Enrique Peña Nieto (2012–2018). He presented a discourse of modernization, aiming to distance himself from the PRI's authoritarian past by adopting a more technocratic and managerial tone focused on efficiency, modernization, and inclusive rhetoric. In practice, however, his government continued to implement neoliberal structural reforms, particularly in the energy and education sectors. While there were efforts to improve public service delivery, these reforms were largely top-down and technocratic in nature, lacking meaningful public engagement and trust.

Peña Nieto's administration was also marked by growing public dissatisfaction, numerous corruption scandals, and rising inequality. As Arriaga (2014) notes in his report, one of the sectors most affected by the government's reforms was education. The technocratic and authoritarian nature of the education reform triggered widespread resistance, especially among teachers in poorer, rural, and Indigenous regions, as it failed to consider their lived realities and perspectives.

In contrast, the rise of AMLO and MORENA (2018–2024) marked a significant ideological shift to the left, characterized by stronger state intervention, a rejection of neoliberalism, and a prioritization of social programs such as "Young People Building the Future" (Jóvenes Construyendo el Futuro) and "Pension for the Welfare of Older Adults" (Pensión para el Bienestar de los Adultos Mayores). AMLO has emphasized redistribution and universal social assistance

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[12] The PRI's predominant ideology during its 71-year rule in Mexico was a pragmatic blend of revolutionary nationalism, state-led development, and corporatist control, later shifting toward neoliberalism in the 1980s.

instead of the traditional CCTs programs, although some analysts argue that the elimination of conditionalities may reduce long-term impacts on education and health.

In sum, Mexico's political landscape from 2000 to 2024 reflects a dynamic interplay between shifting ideologies and evolving approaches to social and economic policy. The transition from PAN's market-driven governance to PRI's technocratic reformism, and finally to MORENA's left-wing, state-centred model under AMLO, illustrates the country's ongoing struggle to balance economic growth, social development, and public trust. While each administration introduced reforms aimed at modernization and welfare, the varying degrees of public engagement, policy conditionality, and ideological orientation have significantly shaped the outcomes and challenges in addressing inequality, insecurity, and poverty.

III.III. CCTs Features in Mexico

The creation of Mexico's first large-scale conditional cash transfer program, PROGRESA, in 1997 under President Ernesto Zedillo, responded to persistent and multidimensional poverty, stark income inequality, and the need to break the intergenerational transmission of deprivation. At the time, approximately 53% of the population lived in poverty and nearly 17% in extreme poverty (CONEVAL, 1996), while Mexico's Gini coefficient stood at around 0.52 (Our world in data, 2025) reflecting one of the highest inequality levels in Latin America. Structural disadvantages were particularly severe in rural areas, where limited access to education and health services perpetuated low human capital accumulation. Women, especially in poor households, faced restricted economic opportunities, with female labor force participation below 40% (Levy, 2006). In this context, Progresa was designed not only as a social protection measure but as a human capital investment strategy, providing cash transfers to mothers, conditional on children's school attendance and regular health checkups. This dual focus aimed to alleviate immediate poverty while fostering long-term self-sufficiency through improved education, health, and nutrition outcomes.

After the brief overview of the administrations in power during the study period and the context under which the program started, this section presents an in-depth analysis of the evolution of conditional cash transfer programs in Mexico, known throughout different stages as Oportunidades, Prospera, and, more recently, Bienestar. The timeline and charts below highlight the key milestones and transformations of the program under each government.

Figure 3.3 Timeline for CCTs programs in Mexico
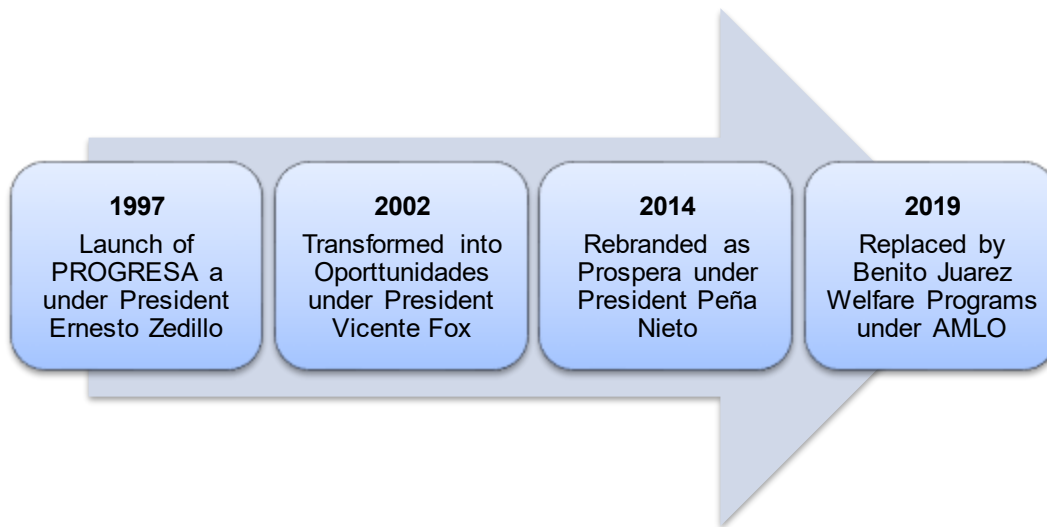
1997	2002	2014	2019
Launch of PROGRESA a under President Ernesto Zedillo	Transformed into Oporttunidades under President Vicente Fox	Rebranded as Prospera under President Peña Nieto	Replaced by Benito Juarez Welfare Programs under AMLO

Source: own elaboration with data from official evaluations and program documents (Mexico, 2024) (CONEVAL, 2012), academic studies and reports by IDB (Lárraga, 2016) and World Bank (Coady, 2003).

Table 3.1 CCTs programs features in Mexico

Feature	PROGRESA (1997–2001)	Oportunidades (2002–2014)	Prospera (2014–2018)	Bienestar – Benito Juárez (2018–present)
Benefit* amounts **(*The values in USD were calculated using the avg. exchange rates of the years of each program)**	*Rural "Progresa" (Education, Health, Nutrition Program):* Provided a monthly food stipend of about MXN 125 (~$13.80 USD) per household. Children in school received education grants (paid bimonthly) that *increased with grade*: roughly MXN 80 (USD 8.82) (grade 3) up to MXN 265–305 (USD 29.22-33.61) (boys/girls by grade 9) per month. Transfers were inflation-indexed.	*Oportunidades:* Similar structure but with higher amounts. By the 2010s, the food support had risen to per month. Education stipends were larger and varied by school level (up to ~MXN 1,285/month (USD 97.35) for high-school-aged children in later years). (Other supplements, e.g. for school supplies or "vivír mejor" food support[13], were added.)	*Prospera (Programa de Inclusión Social):* Continued the same CCT components as Oportunidades. Benefit levels were broadly unchanged or modestly increased: food support around ~MXN 335/month (USD 18.70) and education grants up to ~MXN 1,285 (USD 71.75) for older students. Prospera also added programs for youth (vocational training, savings accounts), but core CCT transfers remained similar.	*Bienestar – Benito Juárez:* Replaced Prospera's CCTs with "becas" (scholarships) that are *unconditional*. For basic education, households with children in grades 1–9 receive MXN 875 (USD 43) per month during the 10-month school year. (By comparison, Progresa's education stipend for a grade-3 boy was ~MXN 80–90 per month in 1999, later higher.) Scholarships for upper-secondary and other welfare supports were also expanded.
Age range of beneficiaries	**Children**: Progresa required children to be at least ~7–8 years old (3rd grade) to receive education grants. It covered primary and middle-school students (up to ~14–15 years old) for education. Younger children (0–6) and pregnant women received health/nutrition supplements (e.g. fortified food, immunizations).	**Children and youth**: Oportunidades extended Progresa's coverage to include all school ages. Education grants were available through secondary school (≈18 years old) by adding scholarships for middle and high school. Nutrition/health support covered children under 6 and pregnant women as before. (Cash transfers for young adults completing education were also later introduced.)	**Children and youth:** Prospera continued covering school-age children (primary through high school). It maintained payments for students up to high school age (~18). It also added programs for youth outside the school system (e.g. vocational training, vocational "Jóvenes") it reflects Prospera's late-stage expansion into labor market and social inclusion policies. Nutrition/health co-	**Children in basic school:** Benito Juárez *educational* scholarships target students in grades 1–9 (roughly ages 6–15). (Separate Benito Juárez programs provide support for upper-secondary students and vulnerable youths, but the main CCT successor focuses on basic ed.) Early childhood (0–3) and preschool programs were shifted to other Bienestar subsidies.

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[13] Vivir Mejor" was the overarching social development strategy launched during Felipe Calderón's administration (2006–2012), aiming to reduce poverty and improve quality of life. Within this framework, food support programs were expanded and integrated into conditional cash transfer schemes such as Oportunidades, with a focus on nutritional assistance for vulnerable populations, including children, pregnant women, and the elderly.

Feature	PROGRESA (1997–2001)	Oportunidades (2002–2014)	Prospera (2014–2018)	Bienestar – Benito Juárez (2018–present)
			responsibilities still covered young children and mothers.	
Target population[14]	Extremely poor rural households (below the food-poverty line* (MXN 400–500 = USD ~45) with school-age children. Progresa was explicitly limited to rural communities (extreme poverty areas). Only families meeting strict poverty criteria and having children (especially ages 8+) or pregnant women were eligible. Initial coverage (1997): 6 states: Guerrero, Hidalgo, Michoacán, Puebla, Querétaro, and Veracruz By 1999: PROGRESA had expanded to all 31 states + Mexico City, but still only in rural localities classified as extreme poverty. *It is the minimum income needed per person to buy a basic basket of essential foods to meet daily nutritional requirements (about 2,100 calories per day)	Poor households nationwide (both rural and urban) with children. Oportunidades expanded Progresa's reach to all 32 states, including semi-urban and urban poor. Eligibility remained means-tested: families below a poverty threshold (proxied by income and housing/deprivation indicators*) with children (and pregnant women) qualified. * This threshold was based on the food-poverty line + essential non-food needs (education, basic utilities). In the early 2000s, this was roughly: Rural: ≈ MXN 550–650 per person/month. Urban: ≈ MXN 900–1,100 per person/month.	Prospera continued full national coverage, with beneficiaries in both rural and urban areas across Mexico. Low-income families nationwide*, under similar targeting as Oportunidades. Prospera retained the proxy means-test for poverty, focusing on households with children and women's health needs. (Prospera also coordinated various social programs, but CCT eligibility remained tightly targeted to the poor.) * This meant households below ~MXN 2,200–2,600 (USD 123-145) (urban) and ~MXN 1,400–1,700 (USD 78-95) (rural) per-person, per month for the broader well-being threshold.	The Benito Juárez scholarships are offered nationwide in public schools. Poor/vulnerable families with children in basic education (grades 1–9). The Benito Juárez scholarships were more broadly targeted than Prospera – not strictly tied to extreme poverty – but still prioritized needy students. In particular, eligibility was extended to moderately poor families* and to children and young adults. The program especially emphasizes children in low-income or high-marginalization communities**. * These are households with a per-capita income below the "línea de bienestar" (well-being line), but above the extreme poverty line. Urban: ~MXN 3,200–3,400 (≈ USD 158–168) per person/month Rural: ~MXN 2,100–2,300 (≈ USD 104–114) per person/month This reflects the combined value of the basic food basket + essential non-food goods (education, transport, clothing). ** Schools in very poor or indigenous communities are targeted first.
Conditionalities	Families had to meet health and education conditions. Mothers/children must attend regular health clinic visits and nutrition workshops (e.g. monthly checkups) and follow growth monitoring.	Oportunidades maintained Progresa's conditions. School-age children had to maintain ≥85% school attendance, and families had to keep up with health checkups and nutrition	Prospera required continued school enrollment/attendance and timely health visits. Compliance with the co-responsibilities was verified	**Unconditional scholarships:** Under the new Bienestar regime, the Benito Juárez educational supports were made *unconditional*. Students receive the stipend as long as they are enrolled; families no longer face attendance or health-reporting

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[14] Poverty thresholds and eligibility criteria are based on official measurements from Mexico's *Consejo Nacional de Evaluación de la Política de Desarrollo Social* (CONEVAL, 2025)) The food poverty line (*línea de pobreza extrema por ingresos*) is defined as the per-capita monthly income required to acquire the basic food basket; the well-being line (*línea de bienestar*) includes both food and essential non-food goods. Thresholds are updated monthly using INEGI's price indices and differ for urban and rural areas.

Feature	PROGRESA (1997–2001)	Oportunidades (2002–2014)	Prospera (2014–2018)	Bienestar – Benito Juárez (2018–present)
	Children (generally 85% attendance) had to attend school on schedule to keep education grants. Failure to comply led to suspension of benefits.	talks (especially for children and pregnant/lactating women). Over time, minor flexibilities were introduced (e.g. allowing make-up* sessions), but the program remained highly conditional. * Make-up sessions were essentially a grace period to comply with missed health/nutrition co-responsibilities, designed to make the conditionality system more flexible and fairer for families facing access barriers.	every two months by the program's coordinators. (Prospera also explicitly coordinated with Education and Health ministries for certification.) Penalties (suspension) applied if conditions were not met.	checks for these funds. (That is, the cash is effectively a scholarship paid by enrollment rather than a conditional transfer.) Other co-responsibility programs (e.g. preventive health) were largely discontinued or merged into new schemes.
Administrative agency	Coordinated by the federal government's social development arm. Originally run by CONPROGRESA (a special federal agency under SEDESOL). CONPROGRESA handled beneficiary registration, payments, and monitoring. Ultimately Progresa was managed within the Ministry of Social Development (SEDESOL), with operating units at state/municipal levels.	Also, under the Ministry of Social Development (SEDESOL). Oportunidades was managed by the Coordinación Nacional del Programa de Desarrollo Humano (a decentralized agency of SEDESOL). SEDESOL, through its National Coordination office and local field teams, oversaw targeting, transfers, and compliance.	Administered by SEDESOL as well (Secretaría de Desarrollo Social). The Coordinación Nacional de Prospera (under SEDESOL) managed the program. Prospera's National Coordination worked with the Education and Health ministries to verify conditions and deliver benefits (typically via local payment points) every two months.	Run by the Secretaría de Bienestar (the renamed/wider Welfare Ministry under the López Obrador administration). The Coordinación Nacional de Becas para el Bienestar Benito Juárez (headed by a national coordinator) administers the scholarships. This agency handles registration and payments for the Benito Juárez education scholarships across the country. (Bienestar also oversees related family support programs.)

Sources: own elaboration with data from official evaluations and program documents (Mexico, 2024) (CONEVAL, 2012), academic studies and reports by IDB (Lárraga, 2016) and World Bank (Coady, 2003).

II.III. I. Insights derived from the interview

As part of the qualitative component of this research, an online interview with an expert was conducted with Dr. Graciela Teruel Belismelis on May 13th, 2025 (Appendix A). Dr. Teruel is Director of the Equide Center for Research in Economics and Public Policy at Universidad Iberoamericana and has extensive experience evaluating Mexico's social programs, including Oportunidades and Prospera, in collaboration with CONEVAL and international organizations. She was selected due to her recognized expertise in social policy design and impact evaluation, making her insights particularly relevant for analysing the evolution of Mexico's conditional cash transfer programs. The interview was semi-structured and aimed at gathering first-hand perspectives on the institutional and political dynamics that have shaped these programs over time.

This interview highlighted several structural and operational challenges faced by Mexico's conditional cash transfer (CCT) programs throughout their evolution. One of the most persistent difficulties was ensuring precise targeting and maintaining updated beneficiary registries. As she explained, *"the program's success depended on reaching the poorest households, but every update to the registry carried the risk of leaving people out or including those who shouldn't be there"* (Teruel Belismelis, interview, May 2025). She also noted the logistical burden of enforcing conditionalities, especially in remote areas: *"Monitoring school attendance and health check-ups in rural and indigenous communities was always a challenge; we had to strike a balance between credibility and not creating an impossible bureaucracy"* (Teruel Belismelis, interview, May 2025). Political dynamics were another recurring obstacle, as *"every administration wanted to put its stamp on the program, which created the risk of redesigns driven more by politics than by evidence"* (Teruel Belismelis, interview, May 2025)*.* In addition, she emphasized that long-term budgetary sustainability required constant defence during periods of fiscal constraint, since *"even with proven impact, social programs are always vulnerable when resources are tight"* (Teruel Belismelis, interview, May 2025).

Despite these obstacles, Dra. Teruel identified several key factors that enabled the continuity of CCTs across more than two decades and successive governments. Foremost was the program's evidence-based design and rigorous evaluation process: *"From the very beginning with PROGRESA, we invested in impact evaluations that gave hard data. That shielded the program because you can argue against ideology, but it's harder to argue against numbers"* (Teruel

Belismelis, interview, May 2025). She also stressed the importance of institutionalization: *"Creating an administrative structure with some autonomy and a dedicated budget line was critical to protecting it from political cycles"* (Teruel Belismelis, interview, May 2025). Another element was political adaptability and the importance of framing CCTs as a national, non-partisan priority; in her words, *"Positioning it as a poverty policy for Mexico, not for one party, helped build consensus and kept it alive through all the transitions"* (Teruel Belismelis, interview, May 2025).

Another important insight subtract from the interview was how she emphasized that one of the most notable changes introduced under Morena-AMLO was the removal of several conditionalities that had defined the CCT model since PROGRESA. Traditionally, the success of these programs relied on linking cash transfers to specific behaviours aimed at building human capital, such as regular school attendance and preventive health check-ups. As she noted*, "The conditionalities were not there to punish families but to create a virtuous cycle: income support combined with investments in education and health to break intergenerational poverty"* (Teruel Belismelis, personal interview, May 2025).

To conclude, she highlighted that under the AMLO administration, these requirements were either significantly relaxed or completely removed, reflecting a shift in the program's philosophy. Dra. Teruel interpreted this as part of AMLO's broader political narrative of "universalizing" social support and reducing what he perceived as bureaucratic and technocratic barriers. However, she also warned of the risks: *"Without conditionalities, the program moves away from the human capital focus that made it unique, and evidence based. It becomes more like a pure cash transfer, which can help in the short term but doesn't guarantee long-term structural change"* (Teruel Belismelis, personal interview, May 2025)

III.III. II. Analysis of CCTs evolution in Mexico

The evolution of conditional cash transfer programs in Mexico offers a clear example of how public policies are shaped and reshaped by shifting political contexts, institutional legacies, and ideological commitments. The trajectory of the programs—initially known as PROGRESA, later Oportunidades, then Prospera, and finally replaced by the Benito Juárez Welfare Programs (Bienestar)—reveals a dynamic interplay between policy continuity and adaptation.

The first major milestone occurred in 1997, with the launch of PROGRESA (Programa de Educación, Salud y Alimentación) under President Ernesto Zedillo. Designed during a period of economic stabilization and neoliberal reforms, PROGRESA reflected a technocratic and evidence-based approach to social policy (Levy, 2006). The program introduced a new model of poverty alleviation that focused on investing in human capital through conditional cash transfers tied to school attendance, health checkups, and nutritional support for low-income families. PROGRESA was distinctive for its strong emphasis on targeting, monitoring, and rigorous evaluation, which positioned it as a global model for anti-poverty programs. Politically, its creation under the Institutional Revolutionary Party (PRI) at the end of its long rule marked a shift toward modernizing social assistance within a context of fiscal austerity and institutional reform.

In 2002, the program was transformed into Oportunidades under President Vicente Fox, the first non-PRI president following Mexico's democratic transition. While the change in administration marked a significant political shift, the continued support for the CCT program underscored the institutional roots and legitimacy that PROGRESA had gained. Under the new name, the program expanded in scope and scale, reaching more beneficiaries, particularly in urban areas. The focus on human capital investment was maintained, but greater emphasis was placed on access to secondary and upper-secondary education. The decision to continue and expand the program under a new party—the National Action Party (PAN)—also suggests that Oportunidades had become politically resilient, a result of its popularity among beneficiaries and international endorsement from institutions such as the World Bank and the Inter-American Development Bank.

The third phase of transformation occurred in 2014, when the program was rebranded as Prospera under President Enrique Peña Nieto. Returning to power with the PRI, Peña Nieto retained the conditional cash transfer model but sought to align it more closely with a broader social protection strategy. Prospera continued the core education and health conditionalities, but importantly, it incorporated additional mechanisms aimed at productive inclusion, such as job training, access to financial services, and support for micro-entrepreneurial activities. These changes reflected a policy shift grounded in human capital theory, particularly as articulated by Becker (1993), which emphasizes the role of investments in education and skills as drivers of individual productivity and economic self-sufficiency. By facilitating beneficiaries' integration into the formal labour market, Prospera aimed to evolve from a compensatory program into one with emancipatory and transformative potential. Politically, this shift resonated with the PRI's broader

discourse of structural reform and modernization, positioning the program as a response to critiques about the limited long-term impact of income transfers alone on social mobility.

A more radical departure came in 2019, when President Andrés Manuel López Obrador (AMLO) launched the Benito Juárez Welfare Programs, effectively replacing Prospera. This marked a clear ideological break from the previous administrations. AMLO, elected under the banner of the left-wing Morena party and promising Mexico's "Fourth Transformation,"[15] criticized past social programs as technocratic, clientelist, and insufficiently transformative (López Obrador, 2018). In contrast to the conditional logic of its predecessors, the new programs emphasized universality and rights-based access, removing many of the behavioral conditions that had characterized CCTs. Programs such as the Becas Benito Juárez (scholarships for students) and Jóvenes Construyendo el Futuro (apprenticeships for youth) sought to address poverty by offering direct support to vulnerable populations without the intermediaries or conditions of earlier programs. This shift reflects not only a different policy approach but a redefinition of the state's role in guaranteeing social rights.

Taken together, the process tracing of Mexico's CCT programs reveals a complex pattern of continuity and change. While the institutional structure and underlying logic of conditional transfers persisted across different political regimes, each administration introduced adaptations shaped by its ideological orientation, political objectives, and development priorities. From Zedillo's technocratic innovation to Fox's pragmatic expansion, Peña Nieto's human capital-driven emphasis on productive inclusion, and AMLO's universalist reinvention of social assistance, the evolution of these programs illustrates how social policy in Mexico has been both path-dependent and politically contingent. It also underscores the central role of policy framing, as successive governments reshaped the narrative, objectives, and mechanisms of CCTs to reflect their broader political projects.

Yet, embedded within this evolution is a long-standing tension between the promise of conditionality and the reality of structural barriers, particularly in rural and marginalized communities. Despite the intention to incentivize health checkups and school attendance, many families faced limited access to nearby schools or health centers, lacked reliable transportation, or were constrained by household dynamics in which children were needed to care for siblings or

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[15] Morena's official campaign platform, where AMLO defines the "Cuarta Transformación" and argues for shifting from conditional, targeted programs to universal, rights-based social policy. (López Obrador, 2018)

elders. These implementation barriers undermined the effectiveness and fairness of the conditionalities, often penalizing the poorest for circumstances beyond their control. It is within this context that AMLO's reforms have been framed. By removing conditionalities Morena's government aimed at restoring dignity and expanding beneficiaries' substantive freedoms through access to adequate food, health, and education rather than reinforcing exclusion, which is in line with the capability approach.

III.IV. Key Characteristics of Brazilian Governments under Analysis

The first government under analysis is the mandate of Luiz Inácio Lula da Silva (2003–2011), from the Workers' Party (Partido dos Trabalhadores-PT), who led with a left-wing, redistributive agenda focused on poverty reduction through his flagship program, Bolsa Família (BFP), increased minimum wages, and inclusion policies. His administration balanced social spending with macroeconomic stability, earning international praise for combining growth with redistribution.

His successor, Dilma Rousseff (2011–2016), continued the PT's interventionist and social-oriented approach during her first term (2011-2014). Her administration maintained key social programs such as BFP, and expanded initiatives aimed at poverty reduction, access to education, and infrastructure development through programs like My Home My life[16] (Minha Casa Minha Vida) and Brazil without Poverty[17] (Brasil Sem Miséria). However, as global commodity prices declined and Brazil's economic growth slowed, Rousseff faced mounting fiscal pressures. In response, she adopted more austere fiscal measures at the beginning of her second term (2015–2016), including budget cuts and pension and labour reforms, which alienated much of her traditional support base (Silva A. L., 2021).

This period of Rousseff's presidency was marked by intense political instability, a deep economic recession, and growing public discontent, all of which were intensified by the *Lava Jato* (Car Wash) corruption investigations. The scandal implicated a wide range of political elites across party lines, including prominent members of the Workers' Party (PT), further eroding public trust in government institutions. As Webber (2016) notes in his article "Life After Dilma", although no direct evidence linked Rousseff personally to acts of corruption, she was impeached in 2016 on

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[16] Its goal was to reduce the housing deficit by providing subsidized housing for low- and middle-income families. The program partnered with the private sector to build homes and offered favourable financing terms, especially for the poorest families.
[17] Its goal was to eradicate extreme poverty through income support, access to services, and productive inclusion for vulnerable populations.

charges of fiscal mismanagement. Specifically, she was accused of employing accounting manoeuvres—commonly referred to as pedaladas fiscais—to conceal the size of the budget deficit.

The transition to Michel Temer (2016–2018), following Rousseff's impeachment, marked a significant shift in Brazil's political and economic direction. As a member of the Brazilian Democratic Movement (MDB)—a centrist party with pro-market leanings—Temer quickly distanced his administration from the interventionist policies of the PT era and adopted a fiscally conservative agenda. His government implemented a series of structural reforms aimed at restoring investor confidence and addressing the country's growing fiscal deficits. Among the most consequential measures were the constitutional spending cap (Emenda Constitucional 95), which froze real federal public spending for 20 years, and the labor reform of 2017, which weakened workers' protections in the name of labour market flexibility.

While these reforms were praised by financial markets and business sectors for signalling fiscal responsibility, they also generated widespread social discontent. By prioritizing macroeconomic indicators such as deficit reduction and inflation control over social investment and public services, Temer's policies contributed to worsening inequality, increased job precarity, and stagnation in welfare improvements. Furthermore, Temer himself was deeply unpopular and involved in corruption allegations, which further eroded public trust in the political establishment. This combination of austerity, rising inequality, and institutional disillusionment created fertile ground for the emergence of an authoritarian and anti-system populist figure like Jair Bolsonaro.

Jair Bolsonaro (2019–2022) from the far-right Liberal Party (PL) further dismantled progressive policies, reduced environmental protections, and deprioritized inclusive welfare. He promoted a neoliberal and socially conservative agenda, emphasizing fiscal restraint, deregulation, and minimal state intervention. His COVID-19 response was controversial, and inequality and hunger surged again post-pandemic. While temporary emergency cash transfers "Auxílio Emergencial" (which temporarily replaced Bolsa Familia) provided some relief during the height of the crisis, the post-pandemic period saw a resurgence of hunger, poverty, and inequality, especially as inflation rose and economic recovery stagnated. According to the Rede Penssan (Brazilian Research Network on Food and Nutrition Sovereignty) (2022), over 33 million Brazilians were facing severe food insecurity—a level unseen in over a decade.

Despite the challenges and political instability that marked the final years of Dilma Rousseff's presidency — the last PT leader before 2023 — the outcomes of Jair Bolsonaro's administration

were considerably more detrimental, particularly for the most vulnerable segments of the population. Widespread social setbacks, environmental degradation, and Brazil's declining international standing under Bolsonaro contributed to the electoral return of Luiz Inácio Lula da Silva in 2023. Lula's third presidency represents a renewed effort to rebuild social protection systems, restore environmental governance, and reposition Brazil on the global stage. His administration has emphasized a pragmatic approach that seeks to reconcile fiscal responsibility with social commitment, reflecting a more moderate progressivism shaped by contemporary domestic and international constraints (Sauer, 2023).

In conclusion, Brazil's political evolution from 2003 to 2023 reveals the tensions between social inclusion and economic constraint. While Lula's initial presidency achieved notable progress in poverty reduction, subsequent governments faced growing instability, culminating in austerity under Temer and deepened inequality under Bolsonaro. Lula's return in 2023 reflects a renewed commitment to rebuilding social protections and restoring environmental and global leadership, though now within tighter fiscal and political constraints.

III.IV.I. CCTs Features in Brazil

The foundations of Brazil's conditional cash transfer system were laid in 2001 under President Fernando Henrique Cardoso, with the creation of Bolsa Escola and Bolsa Alimentação, which targeted poor households with children or pregnant women to promote school attendance and basic health care. At the time, Brazil's Gini coefficient was about 0.58 (World Bank, 2025), poverty[18] affected nearly one-half of the population (about 87 million Brazilians), and extreme poverty remained widespread in rural areas and the North–Northeast. When Luiz Inácio Lula da Silva took office in 2003, food insecurity still affected over 40 million Brazilians[19], and existing programs were criticized for fragmentation and limited reach. Lula responded by consolidating these schemes into Bolsa Família within the broader Fome Zero strategy, seeking to guarantee immediate income security, improve coordination, and address structural inequalities through integrated education and health conditionalities.

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[18] The poverty line of $8.30 per day is set by the World Bank to be representative of the definitions of poverty adopted in upper-middle-income countries. This data is adjusted for inflation and for differences in living costs between countries.

[19] According to a report by the FAO, in 2003 over 40 million Brazilians—out of a total population of about 170 million—were estimated to be living on less than USD $1 per day, indicating chronic hunger and extreme poverty (FAO, 2003).

This section presents an in-depth analysis of the evolution of conditional cash transfer programs in Brazil, known mainly as Bolsa Familia. The timeline and charts below highlight the key milestones and transformations of the program under each government.

Figure 3.4 Timeline for CCTs programs in Brazil

2001
Bolsa Escola and Bolsa Alimentacao were created under President Fernando Henrique Cardoso

2003
Creation of Bolsa Familia under President Lula

2010
Expansion and international recognition with Dilma Rousseff´s governmet

2021
Replaced by Auxilio Brasil under President Bolsonaro

2023
Lula reinstates Bolsa Familia with reforms
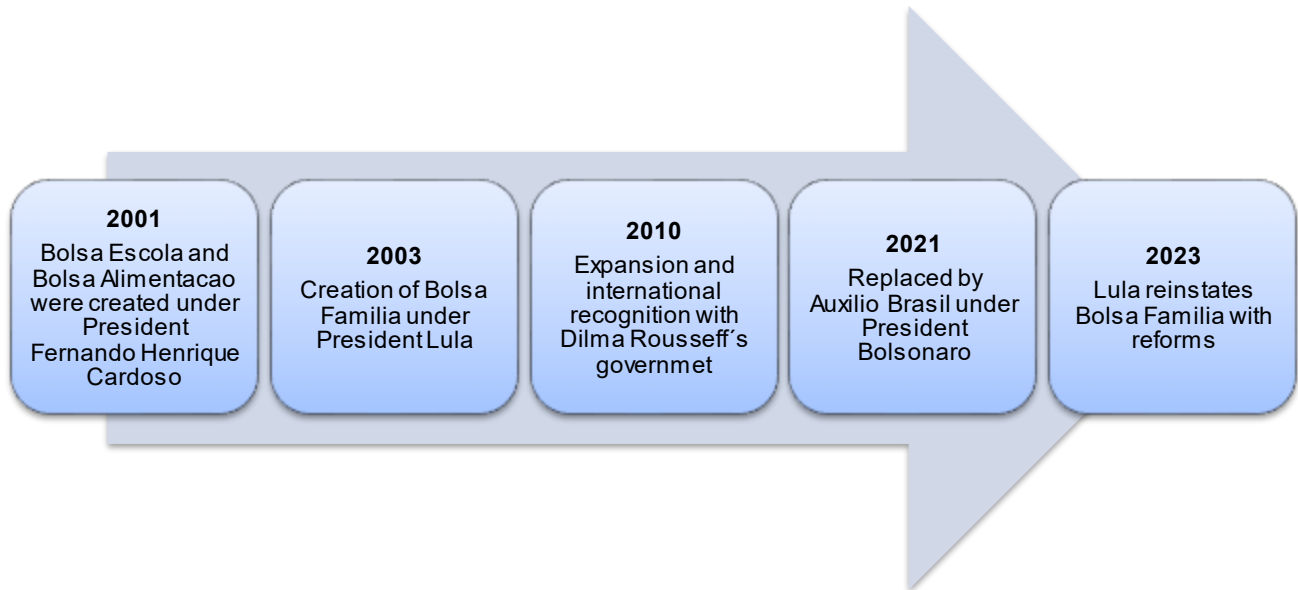
Source: own elaboration with data from (Hall A. , 2006; Brazil, 2003; 2021; 2023)

Table 3.2 CCTs programs features in Brazil

Feature	2001 – Bolsa Escola & Bolsa Alimentação (F.H. Cardoso)	2003 – Bolsa Família Launch (Lula)	2010 – Bolsa Família Expansion (Dilma)	2021 – Auxílio Brasil (Bolsonaro)	2023 – Renewed Bolsa Família (Lula)
Benefit* amounts **(*The values in USD were calculated using the avg. exchange rates of the years of each program)**	Poor families with monthly per capita income ≤ R$90 (about half the minimum wage in 2001[20]). Bolsa Escola: R$15 (USD 6.36) per month *per child* of school age, up to 3 children (max R$45 (USD 19.07) per family). Bolsa Alimentação: R$15 per month *per* eligible child (ages 0–6) or pregnant/nursing mother, up to 3 beneficiaries (max R$45). *(A separate Auxílio Gás started in 2002 provided ~R$7.5/month (USD 3.2) for cooking gas).*	Families in extreme poverty[21] (< R$60 (USD 19.48) per capita) received a basic benefit of R$50 plus R$15 per child (age ≤15) for up to 3 children (total up to R$95/month (USD 30.85)). Poor families (R$60–120 (USD 19.48-38.96) per capita) received R$15 per child (up to R$45/month (USD 14.61)) with no base amount. (These values merged and unified earlier programs' school, food, and gas stipends.)	Basic benefit raised to R$68[22] (USD 38.64) per month for extremely poor families (≤ R$70 (USD 39.77) per capita). Variable benefit R$22 per month for each child 0–15, up to 3 children (max R$66 (USD 37.50)). Plus, a "Variable Youth" benefit of R$33 for each adolescent 16–17, up to 2 per family (max R$66). *(By this stage, a fully eligible large family could receive ~R$160–200/month (USD 90.91-113.64) in total aid.)*	At this stage was Introduced a new benefit structure: Early Childhood Benefit – R$130 (USD 24.12) per month for each child aged 0–3 (limit 5 children); Family Composition Benefit – R$65 (USD 12.06) per month for each family member aged 3–21 (in school) or each pregnant woman, up to 5 per family; Extreme Poverty Benefit – a variable top-up for families below the poverty line to ensure at least R$100[23] (USD18.55) per capita income (minimum R$25 (USD 4.64) per member). *Additional supplements* (introduced by this program) rewarded specific achievements: e.g. a school sports stipend (R$100/month), a junior scientific scholarship (R$100), assistance for families	Bolsa Família 2023: Guarantees a minimum transfer of R$600 (USD 118.11) per month to every beneficiary family. In addition, pays R$150 (USD 29.53) monthly for each child aged 0–6 years, and R$50 (USD 9.84) for each child 7–18 years old as well as each pregnant woman in the family. With these additions, a large poor family's benefit can reach roughly R$900 (USD 117.17) in total (the average benefit in 2023 is ~R$705 (USD 139)). *(These reforms effectively restored the higher pandemic-era benefit level and added new per-child supplements.)*

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[20] In 2001, the classification of poor families for programs like Bolsa Escola and Bolsa Alimentação was not tied to an official national poverty line, as Brazil did not yet have a consolidated or statutory poverty index like in later years. Instead, income eligibility thresholds were administratively defined by the federal government for each program.

[21] In the original design of Bolsa Família in 2003, families were classified as living in extreme poverty if their monthly per capita income was below R$60, while poor families were those earning between R$60 and R$120, provided they had children. These thresholds were defined in nominal terms by the federal government based on domestic socio-economic criteria and were used to determine eligibility for different components of the program

[22] These increases reflected not just inflation adjustments but also political efforts to expand the reach of Bolsa Família — especially under Dilma's Brasil Sem Miséria strategy, which sought to include vulnerable families who had previously been excluded.

[23] The R$100 per capita/month threshold was established by the program's own legislation, specifically Law No. 14.284/2021, which created Auxílio Brasil. This law defined the eligibility criteria and benefit structure of the program, including the thresholds for classifying poverty and extreme poverty. See: Lei nº 14.284, de 29 de dezembro de 2021, Art. 3, Art. 6º, and Art. 8º. Available at: https://www.planalto.gov.br/ccivil_03/_Ato2019-2022/2021/Lei/L14284.htm.

Feature	2001 – Bolsa Escola & Bolsa Alimentação (F.H. Cardoso)	2003 – Bolsa Família Launch (Lula)	2010 – Bolsa Família Expansion (Dilma)	2021 – Auxílio Brasil (Bolsonaro)	2023 – Renewed Bolsa Família (Lula)
				without daycare access (R$200–300) (USD 37.11-55.66), urban/rural work incentives (R$200), and a transition compensatory benefit. *(By 2022, a guaranteed minimum of R$400 (USD 74.21) per family was instituted via legal amendment.)*	
Age range of beneficiaries	Bolsa Escola: school-age children roughly 7–14 years old (elementary/middle school) were the direct child beneficiaries. Bolsa Alimentação: targeted infants and young children 0–6 years old, along with their mothers (pregnant or breastfeeding) as beneficiaries. (Older teens and other adults were not covered by these specific grants.)	Children and adolescents up to 15 years of age (i.e. under 16) in poor families were the focus. Bolsa Família's conditional cash transfers in 2003 applied to young dependents – generally infants through junior high age – reflecting the goal of breaking the poverty cycle through the next generation. *(No benefits were provided for 16–17-year-olds until later expansions.)*	Child and adolescent beneficiaries from infancy up to 17 years old. By 2010, Bolsa Família had been expanded to include older teens: children 0–15 continued to receive the standard variable benefit, and starting in 2008 adolescents 16–17 could receive the additional BVJ (Benefício Variável Jovem) benefit if in school. (There was still no direct benefit for adults beyond the mother being the recipient; however, in 2011 the program would add modest benefits for pregnant and nursing women as part of its evolution.)	Covered dependents ranged from early childhood to young adulthood. Auxílio Brasil distinguished benefits for 0–3-year-old children (early childhood), for children and youth 3–21 years old (school-aged through college-age if still in education) and included pregnant women as a covered category. This meant families with older adolescents and youths up to 21 (who are enrolled in schooling or vocational training) could receive support – a notable extension beyond the prior 17-year-old limit. *(Extremely poor families without any children or pregnant members could still receive the income top-up, though the primary design was centred on households with children.)*	Returns focus to children and teens, with added attention to early childhood development. The 2023 Bolsa Família provides an extra benefit for each child 0–6 years old in the family, and a smaller extra benefit for each child/adolescent 7–18 years old. Pregnant women are also explicitly included for an additional stipend. In summary, all ages qualify for the *base* family grant (so a destitute elderly couple could receive R$600 if under the income limit), but children 0–18 and expectant mothers are the key beneficiary groups for the supplemental amounts – reflecting the program's renewed emphasis on investing in children's health and education.
Target population	Targeted poor families with monthly per capita income ≤ R$90, focusing on those with school-aged children (primary-school age; see next row for age details). This	Eligibility was extended to all families in poverty (around < R$120 per capita), especially those with children or expecting mothers, while extremely poor households (< R$60) received a basic stipend even if they had	The changes that took place expanded the program coverage to about 12–13 million families nationwide by 2010. The program was truly national in scope –	The main reforms expanded the program to around 17 million beneficiary families (up from ~14.6 million under Bolsa Família). Crucially, Auxílio Brasil allowed even extremely poor households without children to	The program´s design ensures that all poor families are supported – including childless couples or other households that previously might not qualify – while still channelling extra resources

Feature	2001 – Bolsa Escola & Bolsa Alimentação (F.H. Cardoso)	2003 – Bolsa Família Launch (Lula)	2010 – Bolsa Família Expansion (Dilma)	2021 – Auxílio Brasil (Bolsonaro)	2023 – Renewed Bolsa Família (Lula)
	program began as local initiatives in cities (pioneered in Brasília and Campinas in 1995) and was federalized in 2001 to cover poor households nationwide. By 2003 it had enrolled millions of families across all regions. Both urban and rural areas were included, though early adoption was mostly in larger municipalities	no children. The program rapidly expanded to all 5,570 municipalities, using the new CadÚnico registry to identify poor families. Regional focus: It prioritized Brazil's poorest areas – notably the rural Northeast, which suffered high hunger rates. By the late 2000s, Bolsa Família covered millions of beneficiaries across urban favelas and remote rural villages alike	by 2011 it reached 26% of Brazil's population with disproportionate impact in poorer regions and rural areas. In the Northeast, for instance, roughly one-third of all families became Bolsa Família beneficiaries (compared to under 10% of families in the more affluent South). Even remote Amazonian communities and small interior towns were included through decentralized implementation and outreach efforts, ensuring that rural poor families were as likely to benefit as urban ones.	receive a basic "extreme poverty" benefit – addressing groups previously left out of variable benefits. The program continued to operate countrywide, encompassing both urban and rural poor. No specific region was excluded; instead, the expansion meant more poor families in cities and underserved areas could now be reached. Like its predecessor, Auxílio Brasil was implemented in all municipalities, maintaining Brazil's broad regional coverage of the cash transfer network.	to families with children (to invest in education and nutrition). The coverage was expanded further, aiming to reach roughly 20 million families nationwide (a substantial increase in enrolment). The revamped program thus broadens support in both urban and rural areas, with a continued emphasis on the most vulnerable populations (especially those in extreme poverty and those with children) across all regions of Brazil.
Conditionalities	Bolsa Escola (Education): Children had to maintain at least 85% school attendance; parents and schools were required to ensure no child labour (the grant explicitly prohibited child labour as a condition). Bolsa Alimentação (Health): Participating mothers had to attend pre- and postnatal medical visits; young children's growth and vaccination schedules	Education: Children 6–15 years old must be enrolled and attend school at least 85% of the time. Health: Children under 6 must receive all basic vaccinations and regular health check-ups (growth monitoring) through the public health system. Pregnant women (if part of the program) are expected to attend prenatal care. Other: Parents/adults in the household were encouraged to participate in literacy or job training courses when available. (Failure to meet	Education: School attendance requirement of at least 85% for children aged 6–15, and 75% attendance for adolescents 16–17 (a slightly lower attendance threshold acknowledging older teens' higher dropout risk). Health: Children up to age 7 must follow the official vaccination schedule, attend growth monitoring	Education: Largely continued Bolsa Família's conditionalities – children and teens were required to attend school (with a minimum attendance around 85% for younger children and 75% for older adolescents, similar to the prior rules) to remain eligible. Health: Likewise, beneficiary families had to keep children's vaccines up to date and participate in health check-ups (monitoring of weight, growth, etc.), and pregnant women needed to attend prenatal appointments, as under Bolsa	However, the universal minimum benefit of R$600 for all poor families regardless of family composition or compliance with conditions was stablished. To receive the supplemental benefits the families, need to fulfill with the following conditionalities. Education: Children must attend school or early education – at least 60% attendance for kids 4–6 years old (pre-school/kindergarten), and 75% attendance for students

Feature	2001 – Bolsa Escola & Bolsa Alimentação (F.H. Cardoso)	2003 – Bolsa Família Launch (Lula)	2010 – Bolsa Família Expansion (Dilma)	2021 – Auxílio Brasil (Bolsonaro)	2023 – Renewed Bolsa Família (Lula)
	had to be kept up to date; and families were required to participate in nutrition education seminars. (These health conditions aimed to combat malnutrition and infant mortality.)	education or health conditions could lead to warnings, and eventual suspension from the program.)	appointments, and receive other basic health services (e.g. vitamin supplementation). Pregnant beneficiaries are required to attend prenatal care visits (and postpartum follow-ups), and infants must go to regular health check-ups. (Conditionality monitoring was rigorous: by 2010 over 15 million students and 9.8 million healthcare schedules were being tracked for compliance.)	Família. (These requirements were reinstated as the pandemic eased; the Ministry of Citizenship monitored school and health system data to ensure compliance.) Non-compliance would trigger a cycle of notifications and could eventually lead to benefit suspension if not corrected.	6–18 years old who have not completed basic education. Health: All children under 7 must adhere to the national vaccination schedule and undergo regular health and nutrition monitoring (weight/height checks) at health clinics. Pregnant women in the program must attend prenatal care appointments.
Administrative agency	Split administration by sector: Bolsa Escola was a federal program under the Ministry of Education (MEC), implemented in coordination with municipal governments and funded by the national budget (payments were made via Caixa Econômica Federal bank). Bolsa Alimentação was administered by the Ministry of Health, leveraging public clinics for health monitoring. These programs were part of FHC's *Rede de*	Bolsa Família (2003) brought management under one roof by merging prior programs Fome Zero strategy, with a mission to combat extreme poverty and hunger nationally. A new Ministry of Social Development and Hunger Alleviation (MDS) was created in 2003 to consolidate Bolsa Escola, Alimentação, and other grants. The MDS became the lead agency coordinating the program nationally. Implementation is highly decentralized: the federal MDS sets policy, manages the unified CadÚnico registry, and	MDS continued to oversee Bolsa Família through 2010, with improved integration. The program was managed by the Ministry of Social Development and Combat Hunger (MDS), operating within the unified social assistance framework (SUAS). By 2010, all 5,565 municipalities were formal partners in implementation. The MDS's National Secretariat for	Ministry of Citizenship (2019–2022) – During Bolsonaro's administration, the social programs portfolio was handled by the Ministry of Citizenship (MC), which was essentially the MDS renamed and restructured. Auxílio Brasil was designed by this ministry and implemented via the same mechanisms: the national CadÚnico database for targeting, payment delivery through Caixa, and local execution by municipalities (CRAS centers and social assistance network). The Ministry of Citizenship coordinated with other agencies	Ministry of Social Development and Assistance, Family and Fight against Hunger (MDS) – In 2023, the Lula administration re-established a dedicated social development ministry (effectively restoring the MDS, with an expanded name) to manage Bolsa Família. The program is once again housed in this ministry, ensuring focused oversight of cash transfers and food security. Implementation continues to be collaborative: the MDS coordinates with the Unified Social Assistance

Feature	2001 – Bolsa Escola & Bolsa Alimentação (F.H. Cardoso)	2003 – Bolsa Família Launch (Lula)	2010 – Bolsa Família Expansion (Dilma)	2021 – Auxílio Brasil (Bolsonaro)	2023 – Renewed Bolsa Família (Lula)
	Proteção Social and were centrally funded but locally executed.	provides funding; Caixa Econômica Federal (a state bank) issues the monthly payments to families; and state and municipal governments enrol families and monitor conditionalities on the ground. This integrated structure reduced overlap and administrative costs.	Citizenship Income (SENARC) handled central administration, while municipalities executed beneficiary targeting, registration updates, and compliance follow-up. The Ministries of Health and Education cooperated by providing data for conditionality monitoring, under inter-ministerial protocols.	(Health, Education) for conditionality enforcement. *(In 2021, Auxílio Brasil's launch was backed by new legislation – Law 14,284/2021 – and a transition from Bolsa Família's institutional framework to the Ministry of Citizenship's oversight, until the program was again reverted in 2023.)*	System (SUAS) and line ministries (for health and education conditionalities), and Caixa remains the payment operator. The governance includes an updated Social Participation Council to oversee Bolsa Família and inform policy decisions (reaffirming a more centralized but participatory management approach after the Auxílio Brasil period).

Sources: Own elaboration with data from official program legislation and operational guidelines (Brazil, 2003; 2021; 2023), academic evaluations (Hall A. , 2006), (Hunter, 2014) and reports by international organizations such as the World Bank (Lindert, 2007) and IPEA (2013)

III.IV. II. Insights derived from the interview

As part of the empirical dimension of this research, an online interview was conducted with Francisco Menezes in June 2025 (Appendix B). Menezes is a prominent economist and researcher at ActionAid Brasil, with decades of experience in the field of poverty, inequality, and food security. He has served as president of the Conselho Nacional de Segurança Alimentar e Nutricional (CONSEA) and has played a key role in shaping debates around income transfer programs in Brazil. His long-standing involvement with civil society organizations and direct engagement with policy discussions make his perspective particularly valuable for understanding both the political drivers and structural challenges behind the implementation and continuity of Bolsa Família. The interview was semi-structured and aimed at gathering first-hand perspectives on the institutional and political dynamics that have shaped this program over time.

Francisco Menezes emphasized that the roots of poverty in Brazil cannot be fully understood without recognizing the deep structural inequalities that define the country. As he put it, *"Brazil is a country marked by very deep, very intense inequalities… there is a profound income inequality as well as racial, gender, and regional inequalities that form the foundations of this situation of poverty"* (F. Menezes, interview, June 2025). This framing highlights how Bolsa Família was not only a response to income deprivation, but a tool aimed at reducing entrenched disparities, aligning with both the Structuralist and Capability approaches in development policy.

Operationally, Menezes identified several challenges that emerged in the design and implementation of Bolsa Família. One of the most significant was the integration of multiple fragmented income transfer programs from previous administrations, including Bolsa Escola, Vale Alimentação, and Vale Gás. These were initially maintained alongside a new food card program, but by October 2003, they were unified under the Bolsa Família umbrella. This consolidation gave the program greater coherence and institutional weight but also required overcoming political and administrative resistance.

A major technical hurdle was the flawed social registry (Cadastro Único-CadUnico) inherited from previous governments. Menezes explained that *"this registry had many problems… it contained many errors…many families who should not be in the program receive the benefits, and those who should be, were not registered"*, making it difficult to ensure accurate targeting. He

noted that *"during the first two years of Bolsa Família, there was a great effort to obtain a more reliable and truthful registry"* (F. Menezes, interview, June 2025). This initial weakness not only undermined public trust—leading to media criticisms—but also exposed the program to political attacks. However, improvements in the registry's quality later earned recognition even from institutions such as the World Bank.

Another core issue was the implementation of conditionalities related to education and health, which are central to the Human Capital approach. While these conditions were maintained, they were contested on both practical and ideological grounds. Menezes explained that some critics questioned whether a rights-based social policy should include obligations, while others pointed to structural barriers that made compliance difficult for many families. He stressed that the government did not systematically expel families for non-compliance, but rather used conditionalities as a diagnostic tool to understand why they were not being met: *"There was importance in maintaining the school and health requirements because this allowed the government to reach the schools and health centres to understand why these obligations were not being fulfilled"* (F. Menezes, interview, June 2025).

He went on to describe several real-world obstacles that limited compliance with conditionalities—especially in rural and vulnerable areas. These included lack of nearby schools and clinics, poor transportation infrastructure, and even security concerns in violent regions. Moreover, in many families, older children dropped out to work or care for siblings: *"The mother needs to go to work, and the oldest daughter stays home to care for the younger children"* (F. Menezes, interview, June 2025). This perspective affirms that the failure to meet conditionalities often stemmed from structural exclusion rather than individual negligence, reinforcing the need for a contextualized, equity-oriented approach to social policy.

Despite these challenges, several factors ensured Bolsa Família's continuity across changing political landscapes. Foremost was the strong political will of President Lula, whose commitment to combating hunger gave the program symbolic and material centrality in his administration. Menezes recalled Lula's pledge*: "His main goal in government in 2003 was to guarantee that all Brazilians would have access to at least three meals a day"* (F. Menezes, interview, June 2025).

The program's resilience was also supported by civil society participation, particularly through institutional mechanisms like the National Food Security Council (CONSEA), which actively

shaped and monitored Bolsa Família. However, Menezes noted persistent public misconceptions, even among beneficiaries, such as the belief that *"cash transfers make people lazy or encourage spending on alcohol"*—a narrative rooted in stigma rather than evidence (F. Menezes, interview, June 2025).

In more recent years, the program faced political and fiscal threats, particularly during the Bolsonaro administration, which replaced Bolsa Família with an alternative model that suffered from design flaws. Additionally, Menezes pointed out that budget constraints are now one of the main barriers to expansion: *"The current Brazilian budget is under great pressure… there is a strong discourse of fiscal adjustment, and this is the main difficulty for the program"* (F. Menezes, interview, June 2025). Inflation, especially in food prices, has further diminished the real value of benefits, while proposed increases have been blocked by legislative opposition.

In sum, Francisco Menezes' testimony paints a rich picture of Bolsa Família as a policy situated at the intersection of poverty relief, structural inequality, and political contestation. Its success has been partial but meaningful—particularly in improving food security and social inclusion. Its limitations, however, underscore the need to combine cash transfers with broader investments in public services and infrastructure. As such, Bolsa Família serves as a powerful, though insufficient, response to multidimensional poverty and remains a critical case for understanding the politics of social protection in Brazil.

III.IV.III. Analysis of CCTs evolution in Brazil

The evolution of Brazil's conditional cash transfer (CCT) system demonstrates a clear trajectory of institutional learning and adaptation across political cycles. While the core logic of combining income support with incentives for education and health persisted, distinct shifts in design and implementation reflect changing priorities and ideological orientations. Each phase of reform aligns more closely with one of the three theoretical approaches guiding this study—Human Capital, Structuralist, or the Capability Approach—depending on its underlying rationale and institutional architecture.

The transition from Bolsa Escola and Bolsa Alimentação under Fernando Henrique Cardoso to the unified Bolsa Família in 2003 under Lula marked a foundational shift in Brazil's social policy.

By consolidating fragmented sectoral programs into a single platform, the new administration aimed to enhance coordination, expand coverage, and embed income transfers within the broader Fome Zero strategy[24]. This restructuring aligns most clearly with the Structuralist approach, as it represented a deliberate act of state intervention to redress deep-rooted social and regional inequalities. The creation of Cadastro Único and the program's nationwide rollout reflected a developmental vision that acknowledged Brazil's dual economy and the need to integrate historically excluded populations into formal policy frameworks. At the same time, elements of the Capability Approach were present, as the Fome Zero strategy embraced a multidimensional understanding of poverty—one that sought not only to ensure income security but also to expand beneficiaries' substantive freedoms through access to adequate food, health, and education.

During the late Lula and Dilma administrations (2006–2016), the program was expanded and institutionalized. New components such as the Benefício Variável Jovem (BVJ) for adolescents and benefits for pregnant and lactating women reflected a life-cycle approach to social protection. The integration of Brasil Sem Miséria, which actively identified excluded households, further extended the program's reach into Brazil's most vulnerable rural and interior areas. These reforms are best understood through the lens of the Human Capital approach, as they explicitly aimed to maximize long-term returns through targeted investments in education, adolescent development, and maternal health. Moreover, the program's administrative continuity and scale-up underscored the importance of sustained investment in human capabilities to break intergenerational cycles of poverty.

The introduction of Auxílio Brasil in 2021 under Jair Bolsonaro marked a break in institutional continuity, even as benefit levels increased and new components were added. The program introduced performance-based incentives and extended coverage to older youth, but it also involved the dismantling of the Ministry of Social Development and a rebranding effort that lacked clear institutional safeguards. These changes align most clearly with a Structuralist critique, as they revealed how political imperatives can undermine the stable redistribution mechanisms needed to address structural inequalities. While short-term income support expanded under

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[24] The Fome Zero (Zero Hunger) strategy, launched in 2003 under President Luiz Inácio Lula da Silva, was a comprehensive policy framework aimed at eradicating hunger and extreme poverty in Brazil. It combined emergency food assistance, support for family agriculture, nutrition education, and the expansion of income transfer programs such as Bolsa Família. The strategy reflected a multidimensional approach to poverty, emphasizing the role of the state in guaranteeing the right to adequate food and promoting social inclusion.

Auxílio Brasil, its politicization and reduced institutional anchoring risked weakening the program's developmental role and administrative resilience.

The reformulated Bolsa Família in 2023, under Lula's third term, reinstated the original institutional framework and introduced major benefit enhancements, including a minimum income floor of R$600 (USD 1187.11) and additional stipends for children and pregnant women. These changes reflect a return to long-term planning and social investment, particularly in its emphasis on early childhood development. At the same time, the re-creation of the Ministry of Social Development (MDS) and reaffirmation of conditionalities signal a renewed commitment to the state's active role in development, reinforcing Structuralist principles of institutionalized redistribution.

Across these phases, the Capability Approach offers a valuable lens to assess how the programs expanded beneficiaries' real freedoms. While not central in every period, it is particularly relevant in the 2023 reform, which combined unconditional minimum support—regardless of family composition or compliance with conditions—with targeted supplements for children and pregnant women. This structure goes beyond income relief by ensuring basic economic security while promoting access to education and health, thereby enhancing the capabilities and autonomy of poor families.

In sum, the evolution of Brazil's CCT system illustrates a dynamic interplay between theory and political context. While the Structuralist approach explains foundational reforms aimed at correcting inequality and institutional exclusion, the Human Capital approach best captures the expansion phases focused on long-term development outcomes. The Capability Approach emerges most clearly in periods where social policy was explicitly tied to enhancing freedom and agency, particularly through guaranteed income and access to services. Brazil's case demonstrates how CCTs can evolve from emergency relief tools into multidimensional strategies for inclusive development.

IV. Evolution of the education reform system

This section presents the main findings on the major education system reforms implemented in both countries. Each case has been thoroughly examined, with a focus on identifying the primary

drivers and causal mechanisms behind the creation, evolution, or discontinuation of public policies and programs in the education sector. The analysis connects the theoretical framework to empirical evidence, explaining the key factors that influenced these transformations.
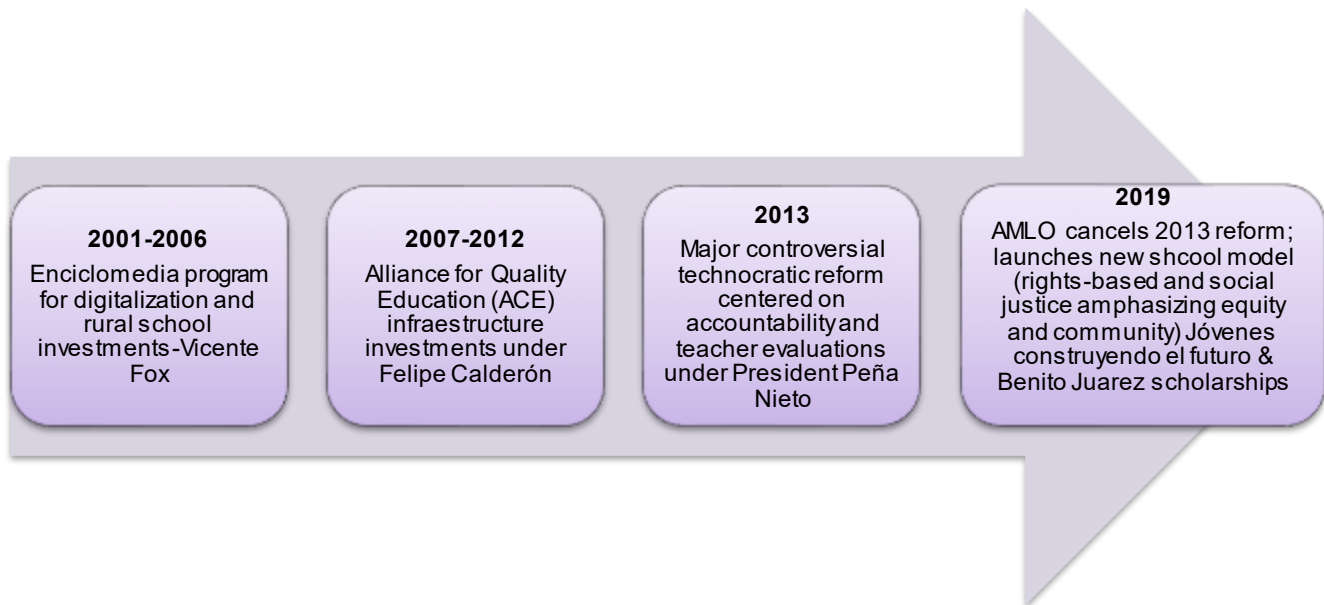
IV.I. Major Education Reforms - The case of Mexico

The Background

At the end of the century, Mexico's education system showed stark disparities in quality and access, particularly between urban and rural areas. In 2000, the country's Human Development Index (HDI)[25] education component was 0.72, below the Latin American average, with pronounced regional gaps. Literacy among adults aged 15+ stood at about 91%, but in rural and indigenous communities it was as low as 70%. Average years of schooling nationwide were 7.3, yet in poorer southern states such as Chiapas and Oaxaca, attainment averaged under 6 years. Only 62% of children aged 12–14 were enrolled in lower-secondary school, and rural dropout rates exceeded 20%. Access to updated learning materials and technology was scarce—fewer than 15% of public schools had any form of computer equipment, and in many rural areas textbooks were outdated for several years (UNDP, 2005). These indicators underscored the urgency of interventions that could modernize learning environments, standardize quality across regions, and expand access to educational resources, forming the backdrop against which the Fox administration launched its first major reform.

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[25] The Human Development Index (HDI) education component is calculated by the United Nations Development Programme (UNDP) and measures two dimensions of educational attainment: (1) Mean years of schooling for adults aged 25 and older, and (2) Expected years of schooling for children entering the education system. Both indicators are normalized and combined to form the education index, which ranges from 0 to 1, with higher values indicating greater educational achievement and access (UNDP, 2023).

Figure 4.1 Education system major reforms in Mexico

2001-2006	2007-2012	2013	2019
Enciclomedia program for digitalization and rural school investments -Vicente Fox	Alliance for Quality Education (ACE) infraestructure investments under Felipe Calderón	Major controversial technocratic reform centered on accountability and teacher evaluations under President Peña Nieto	AMLO cancels 2013 reform; launches new shcool model (rights-based and social justice amphasizing equity and community) Jóvenes construyendo el futuro & Benito Juarez scholarships

Sources: own elaboration based on (Gobierno de Mexico, 2000; 2006; 2019) (López Obrador, 2018)

With Enciclomedia under President Vicente Fox (2001–2006), the government sought to modernize public education and bridge the digital divide. This initiative reflected broader national goals of integrating technology into classrooms and improving the quality of basic education, while also responding to international trends in digital learning. The program provided interactive content (including Microsoft's Encarta encyclopedia) on CD-ROMs and classroom computers, aiming to enhance learning through technology. By mid-2006 the program equipped tens of thousands of 5th and 6th grade classrooms, including many in rural areas that previously lacked access to digital resources (RAND, 2004).

Alongside Enciclomedia, the government boosted rural school infrastructure via compensatory programs such as funding classroom construction, materials, and teacher incentives to reduce absenteeism in marginalized communities. These efforts were driven by a structuralist concern with closing urban-rural gaps in educational inputs. In the same way, bringing technology and basic facilities to rural schools would build human capital in neglected regions, thereby improving equity and future productivity. However, challenges emerged: critics noted the high cost (over US$1 billion) and technical hurdles of Enciclomedia and questioned its sustainability. Many rural teachers needed training to effectively use the new digital tools (RAND, 2004). The long-term impact on learning was mixed, as basic outcomes in rural schools remained low (e.g. indigenous and rural students continued to score far below urban peers in assessments).

But Fox's reforms set a precedent that education quality improvements must tackle resource inequalities between regions.

Under President Felipe Calderón, Mexico shifted focus toward teacher quality and accountability through the Alliance for Quality Education (Alianza por la Calidad de la Educación, ACE) launched in 2008. This was a pact between the federal government and the powerful teachers' union (SNTE) intended to modernize the education system. Low learning outcomes and public demand for better schools pressed the government to address what a human capital perspective identifies as a key determinant of quality – teacher performance. The ACE agreement introduced meritocratic standards in an attempt to weaken decades-old clientelism in teacher hiring. Notably, it required new teachers to pass a standardized exam for entry into the profession and sought to end the union's practice of selling or inheriting teaching positions (La Botz, 2016).

It also promised investments in school infrastructure and an extension of the school day (an effort to improve learning especially for poor and rural students). While the policy design aimed to create a more accountable, competency-based teaching workforce, The causal mechanism or in other words the success of the reform depended on union cooperation, which proved difficult to obtain. Initially, SNTE's national leader (Elba Esther Gordillo) endorsed ACE, but local union bosses soon repudiated and refused to participate in the teachers' tests. The union's entrenched interests and political influence meant that many states saw minimal compliance; several state-level SNTE officials simply refused to implement the evaluations (Bruns, 2016).

At the end some new hiring processes did become more transparent, and a national student testing regime (ENLACE) was rolled out, shedding light on performance gaps. There were also infrastructure upgrades (classrooms, labs) during Calderón's term, modestly benefitting rural schools. But overall, ACE's impact on learning was limited – student achievement showed little improvement (Bruns, 2016). Urban schools in wealthier states, which already had more resources, were better positioned to meet new standards, while rural and high-poverty areas often lacked the support to capitalize on reforms. The urban–rural educational gap thus persisted. From a human capital approach, ACE was a step toward upgrading the quality of Mexico's workforce by professionalizing teaching. Yet in practice its structuralist goals of breaking union clientelism were only partially realized. Meanwhile, dissident teacher groups (especially the CNTE in poorer southern states) opposed ACE, arguing it "was an attack on the union and on public education"

(La Botz, 2016) reflecting a belief that the reform's design overlooked social context and teachers' rights.

In 2012, Mexico's government – led by President Enrique Peña Nieto – passed a sweeping education reform as part of the cross-party Pact for Mexico. This 2013 reform was a major technocratic review centred on rigorous accountability for teachers and new governance structures. Mexican students' low academic performance and the perception that politicized teacher hiring was at fault provided impetus for change (Reimers, 2025). The reform's design drew from global "new public management" ideas and human capital theory: to improve competitiveness, the education system needed merit-based personnel practices and measurable outcomes. The constitution was amended to create a professional teaching service. Teacher hiring, promotion, and retention became tied to performance evaluations rather than union patronage (La Botz, 2016). An autonomous evaluation agency (INEE) was established to design and oversee standardized tests for teachers and students.

The reform ended the automatic job security that veteran teachers had enjoyed – those who failed evaluations could be reassigned or dismissed – and opened teaching positions to any qualified university graduates (breaking the normal schools' historic monopoly on teacher preparation) (La Botz, 2016). These measures aimed to improve teaching quality and accountability, thereby boosting student outcomes over time. In the short term, the reform faced fierce resistance, especially in rural and marginalized regions. The teachers' union (and its radical wing, CNTE) saw the evaluations as punitive and culturally decontextualized, "a declaration of war" on teachers (La Botz, 2016). Large protests erupted, particularly in high-poverty southern states (Oaxaca, Chiapas, Guerrero), where many teachers felt the new system threatened their livelihoods without addressing the lack of basic resources in their schools.

The federal government responded by arresting the SNTE union boss on corruption charges in 2013, which, while officially unrelated, was widely viewed as a move to neutralize opposition to the reform (La Botz, 2016). The reform was implemented for several years: tens of thousands of teachers took the exams, and some new hiring through merit did occur. There were reported improvements in transparency and a renewed focus on learning outcomes (Reimers, 2025). However, measurable gains in student achievement or narrowing of the urban–rural gap remained elusive by the end of Peña Nieto's term. Many poorer rural schools continued to struggle with high teacher turnover and inadequate preparation to meet the new standards. Indeed, the reform

largely ignored structural inequalities such as resource gaps and socio-economic barriers to learning, focusing narrowly on teacher performance. By 2018, the reform's political sustainability was in doubt – it succeeded in formalizing a more meritocratic framework, but at the cost of eroding the support of large segments of the teaching force and community, raising questions about its legitimacy and long-term impact on capabilities in education.

Finally, in 2019, soon after taking office, President Andrés Manuel López Obrador (AMLO) repealed the 2013 reform and introduced a new vision known as the New Mexican School (Nueva Escuela Mexicana). This shift was driven by a philosophy of education as a social right and by political promises AMLO made to discontented educators. He had campaigned on undoing what he (and many teachers) saw as a "neoliberal" reform overly focused on punitive accountability. The result was a counter-reform that dramatically altered the framework for teachers and students (Cabrera, 2022). AMLO's law (enacted in 2019) eliminated the high-stakes teacher evaluations and ensured that performance tests are no longer a factor in hiring or promotion. The autonomous INEE was dissolved and replaced by a softer coordinating body (MEJOREDU) with limited evaluative power. In effect, much control over teacher appointments reverted to the union and local authorities, restoring a more corporatist governance structure (Reimers, 2025).

At the same time, the New Mexican School model articulates a rights-based, humanistic and community-oriented approach to education. It emphasizes equity, cultural pluralism, and the holistic well-being of students over standardized test scores. For example, the model calls for incorporating indigenous knowledge and languages in schooling. AMLO also launched massive scholarship and youth training programs to tackle poverty-related barriers. The Becas Benito Juárez provide financial support to millions of students from poor families at all levels (similar to an expanded conditional cash transfer but now unconditional for education. *which was already explain in the previous chapter III.III.*), aiming to reduce dropout rates among disadvantaged youth. Another flagship, Jóvenes Construyendo el Futuro, offers paid apprenticeships to unemployed 18–29-year-olds, many of whom are high school dropouts, in order to build their skills and keep them away from poverty and crime. These initiatives explicitly target rural and marginal urban areas where schooling gaps are widest.

In sum, AMLO's approach aligns strongly with the capability and structuralist perspectives: it views education as a vehicle for social equity and community development, consciously moving away from the exam-centric, human-capital-oriented policies of 2013. The reforms aim to
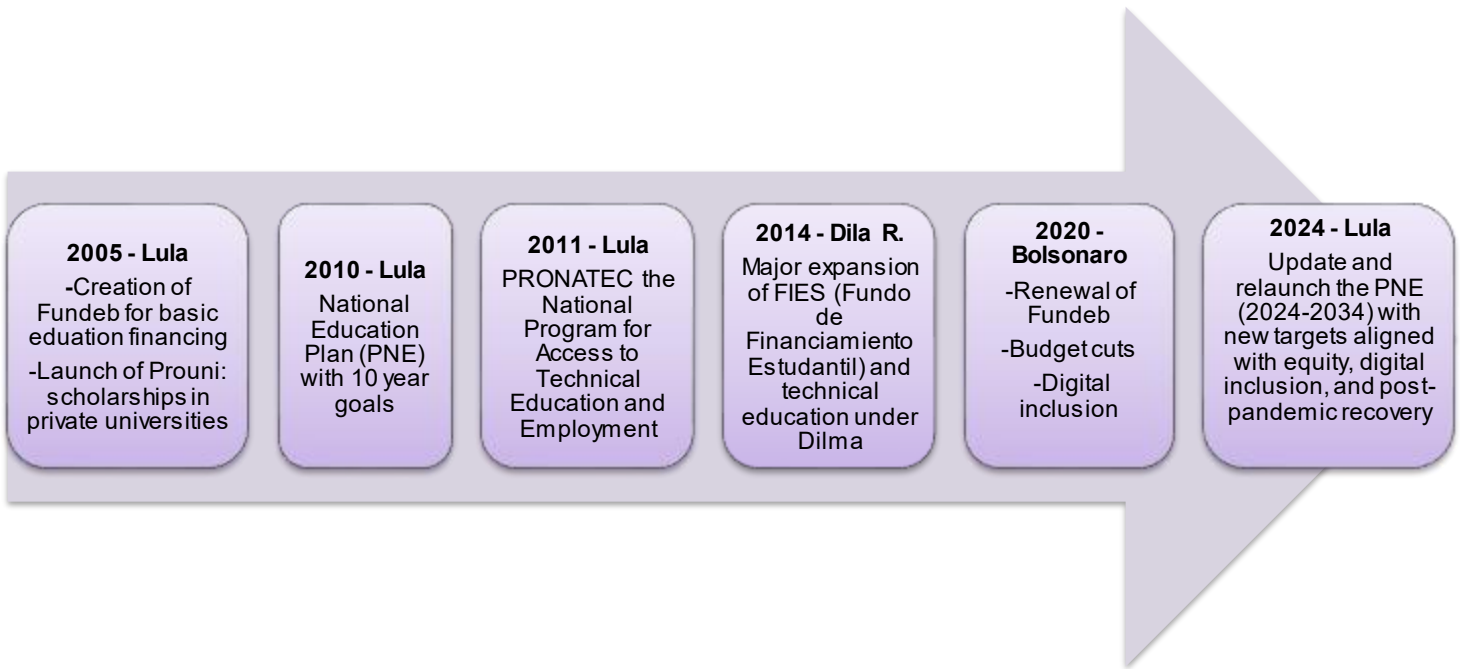
empower teachers and students as agents of their own educational process (fostering "participatory and inclusive" schooling) and to alleviate poverty through education-linked welfare. The true test will be whether this rights-based model can deliver improvements in learning and human capital – especially for rural and marginalized populations – without the performance incentives of the previous regime. So far, Mexico's educational attainment has continued to rise (the average year of schooling is now ~10 years), and inequalities in access have narrowed at lower levels, but quality gaps remain. For instance, by 2019 only 64% of Indigenous youth (15–17) were enrolled in upper-secondary school versus 76% of non-Indigenous youth (Reimers, 2025), reflecting ongoing disparities that current reforms still need to overcome.

IV.II. Major Education Reforms - The case of Brazil

The Background

By the mid-2000s, Brazil's HDI education component was estimated at approximately 0.65, with significant regional variation—richer states exceeded 0.75, while poorer northern regions were under 0.60. National adult literacy averaged 88%, yet regional disparities persisted—rural illiteracy rates reached 25.8%, versus approximately 8.7% in urban areas. The average years of schooling was around 6.1 years, but rural populations averaged only 4.6 years. Meanwhile, net upper-secondary enrolment was a low 46%, and tertiary enrolment stood at under 12% for youth aged 18–24 (UNDP, 2005). This stark disparity in both basic and higher education access provided compelling empirical justification for the Lula administration to prioritize Fundeb (equalizing basic education funding) and ProUni (expanding access to university), as a strategy to correct structural inequalities and broaden opportunities for disadvantaged communities.

Figure 4.2 Education system major reforms in Brazil

2005 - Lula	2010 - Lula	2011 - Lula	2014 - Dila R.	2020 - Bolsonaro	2024 - Lula
-Creation of Fundeb for basic eduation financing -Launch of Prouni: scholarships in private universities	National Education Plan (PNE) with 10 year goals	PRONATEC the National Program for Access to Technical Education and Employment	Major expansion of FIES (Fundo de Financiamiento Estudantil) and technical education under Dilma	-Renewal of Fundeb -Budget cuts -Digital inclusion	Update and relaunch the PNE (2024-2034) with new targets aligned with equity, digital inclusion, and post-pandemic recovery

Sources: own elaboration based on information from (OECD, 2015; 2020; 2024; Edileuza Fernandes-Silva, 2025)

In the mid-2000s, Brazil undertook transformative reforms under President Luiz Inácio Lula da Silva to extend educational opportunity and address deep regional inequalities. Two cornerstone initiatives in 2005–2006 were the creation of Fundeb and the launch of ProUni. Fundeb (Fundo de Manutenção e Desenvolvimento da Educação Básica e de Valorização dos Profissionais da Educação), established by constitutional amendment in 2006, expanded the existing school funding equalization mechanism (Fundef) to cover all levels of basic education, from preschool and primary through lower and upper secondary (MEC, 2007; World Bank, 2012, pp. 4-8). Brazil's vast regional disparities in school resources—where rural and poor Northeastern municipalities spent far less per student than wealthy urban centres—were a structural barrier to equal education ((MEC, 2007; OECD, 2015, pp. 2-7). Fundeb's design is explicitly structuralist, aiming to reduce inequality in per-student spending between different regions by pooling 20% of state and municipal education revenues into a national fund redistributed on a per-student basis, with the federal government adding supplemental funds to ensure a minimum spending floor nationwide (IPEA, 2011). (World Bank, 2012; IPEA, 2011).

Crucially, it explicitly included rural, indigenous, and quilombola[26] (Afro-descendant) schools in its scope, marking a commitment to inclusive development. The impact was significant. By equalizing funding, Fundeb enabled poorer states and municipalities to pay teachers better and improve infrastructure. The urban-rural gap in school access shrank as resources flowed more equitably. In terms of poverty reduction, Fundeb's logic was that investing in human capital in poor regions would, over time, improve skills and earnings. Indeed, it could be said that Brazil's reduction in income inequality during the 2000s was underpinned in part by educational expansion and more equal educational investment. Fundeb exemplifies how a human capital strategy and a structuralist goal can converge: by treating education funding equity as a structural foundation, it sought to enhance the human capital of historically marginalized populations, thereby fostering inclusive growth.

At the same time, Lula's government tackled inequality in higher education through ProUni (Programa Universidade para Todos), launched in 2005. Brazil's tertiary education had long been elitist – public universities were free but scarce, and private colleges were too expensive for the poor. This limited higher-level human capital formation to the middle and upper classes. ProUni's design was innovative: it offers full and partial scholarships at private universities to low-income students (those from public schools or low-income backgrounds), in exchange for tax breaks to the participating institutions (Schneider, 2019).

By leveraging idle capacity in private colleges, the government rapidly expanded university access without massive new public spending. This reflects both a human capital rationale (quickly increase the number of graduates to meet economic demands) and a capability approach, as it removes financial barriers for disadvantaged youth, granting them the capability to pursue higher education and improve their life prospects. ProUni has been quite extensive – in its first five years (2005–2010) alone it awarded over 1.4 million scholarships to low-income students. By 2020, cumulative scholarships reportedly exceeded 2 million, many to first-generation university students. The program contributed to raising Brazil's gross tertiary enrolment ratio and brought greater diversity into universities (Schneider, 2019).

ProUni, alongside racial quotas implemented at public universities, changed the profile of Brazilian higher education – a tangible step toward reducing inequality in the long run by enabling

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[26] Quilombola communities are settlements founded by descendants of Africans who escaped slavery, often located in rural and hard-to-reach areas. Recognized by Brazil's 1988 Constitution, they maintain distinct cultural traditions and have specific territorial rights under federal law (Decreto nº 4.887/2003.

more poor Brazilians to attain professional qualifications. However, challenges included ensuring the quality of education received (as most ProUni students enroll in lower-cost private institutions, some of variable quality) and supporting students to graduate. Still, the program is widely seen as a success in combining public and private effort for social inclusion. Together, Fundeb and ProUni positioned Brazil as an example of how education policy can contribute to reducing income inequality. According to data from our world in data (2025), the country's Gini index declined from 0.58 in 2001 to 0.53 in 2011, representing a notable achievement among emerging economies.

By 2010, Brazil set out an ambitious roadmap for the next decade of education through its National Education Plan (PNE). Drafted in Lula's final year and approved under President Dilma Rousseff in 2014, the PNE (2014–2024) established 10-year goals to address both access and quality. The PNE was driven by a recognition that Brazil needed not just more schooling, but better learning outcomes and equity. It included 20 measurable goals – for example: universal preschool for 4–5 year-olds by 2016; universal high school enrolment (15–17 year-olds) by 2024; eliminating adult illiteracy; increasing the higher education gross enrolment to 33% by 2024; raising teachers' educational qualifications and pay; and dramatically boosting education funding to 10% of GDP by 2024 (OECD, 2015, p. 14).

Underlying the plan was a blend of human capital and capability narratives: education was seen as vital for economic competitiveness and as a fundamental right for social inclusion (hence goals on equity, special education, indigenous education, etc.). The PNE mandated that the federal, state, and municipal governments align their policies to achieve these targets, and it introduced accountability via periodic monitoring reports. However, Insufficient funding and uneven implementation across Brazil's federative system were major issues; some state and local governments made progress on certain goals, while others fell behind. Nonetheless, the PNE provided an important guiding framework and indicated a commitment to long-term educational improvement with equity. It exemplified the structuralist approach at a national policy level, attempting to systematically plan education development as a tool to overcome structural social inequalities (e.g. setting targets for inclusive education of students with disabilities, and for training Afro-Brazilian and indigenous teachers).

Concurrent with the PNE, President Dilma's administration (2011–2016) launched large-scale initiatives to enhance technical and higher education, recognizing that simply expanding basic education was not enough to boost employability and growth. A flagship program was PRONATEC (Programa Nacional de Acesso ao Ensino Técnico e Emprego), created in 2011. Brazil's labour

market had a shortage of skilled technicians and a surplus of low-skilled workers; many youths, especially from poorer backgrounds, were not transitioning to any post-secondary training. PRONATEC aimed to address this by massively expanding free vocational education and training (VET) (OECD, 2015). It was strongly rooted in a human capital rationale – increase the supply of skilled labour to improve productivity – but also a social inclusion motive, offering paths to good jobs for students outside the academic university track.

PRONATEC served as an umbrella for funding millions of free training opportunities. It partnered with the federal network of technical institutes, and state schools to offer courses ranging from short-term professional qualifications to longer technical high school programs. By design, it covered both urban and interior areas successfully opened opportunities for many low-income students – often those in small cities or rural towns – to gain employable skills. However, the program faced challenges in quality and continuity. Rapid scaling led to concerns about oversight: some courses were very short (a few months) with varying quality, and completion rates were not always high. After 2015, Brazil's recession forced budget cuts, and PRONATEC slots were sharply reduced in 2015–2016 (Silva D. d., 2022). Still, the program's initial phase is viewed as a milestone in making Brazil's education system more responsive to workforce needs and in offering rural/urban youths a chance at technical careers. The structural duality of Brazil's secondary education (academic vs vocational) was long criticized for reproducing class inequalities, but PRONATEC began to erode that by valorising vocational paths. The human capital benefits (a more skilled workforce) were intended to complement the capability benefits (empowering youths who might otherwise be trapped in low-skill jobs).

In parallel, Dilma's government expanded FIES (Fundo de Financiamento Estudantil) – a student loan program for higher education. FIES had existed since 1999, but around 2010–2014 it was reformed to offer far more generous terms (near-zero interest, long repayment periods) and scaled up dramatically. This expansion was driven by the PNE goal to raise college enrolment and by political incentives to show quick gains in tertiary education. Many youths who couldn't get a free public university seat could now attend private college on a FIES loan (OECD, 2015). However, the policy's causal mechanism – essentially subsidizing demand – led to unintended consequences: private education companies increased tuition knowing the government would underwrite student payments, resulting in a 6 % rise above inflation in fees (Bertran, 2021, p. 7), and by 2015 the program's costs ballooned, straining the federal budget.

The government had to tighten eligibility in 2015, causing a sharp drop in new loans. In theoretical terms, the FIES expansion leaned heavily on a human capital investment model (assuming more graduates = more growth), but it paid less attention to structural factors like the absorptive capacity of the labour market. Indeed, by late 2010s many FIES-funded graduates found themselves in an economy that could not fully employ them at skilled wages, and some struggled with loan repayment – highlighting that education's payoff also depends on broader economic structure.

The period of 2015–2020 was turbulent for Brazil's education sector. An economic crisis and political shifts resulted in budget cuts and policy uncertainty, especially under President Jair Bolsonaro (2019–2022). Austerity measures (such as a 2016 constitutional spending cap) significantly tightened education funding growth. Bolsonaro's administration in particular took a conservative populist stance, often criticizing universities and promoting ideological changes in curricula. The Education Ministry saw rapid turnover of ministers and shifting priorities, contributing to instability. Thus, by 2020, two major factors dominated: funding debates around Fundeb, and the COVID-19 pandemic which forced a pivot to digital education.

Bolsonaro's government initially showed resistance to maintain prior commitments like the PNE's spending targets. In 2019, his education minister openly stated intentions to lower the PNE investment goal of 10% of GDP, arguing that such an increase was unaffordable and unnecessary if spending were made more efficient (Ying, 2019). Indeed, public education investment had fallen to around 5.5% of GDP by 2015 and remained in that range, far below the PNE's trajectory. This stance reflected a more neoliberal and cost-accounting approach, at odds with the previous expansive consent based on prior rights. However, a broad coalition in Congress and civil society pushed back to protect education funding. In mid-2020, a major development was the renewal of Fundeb: set to expire that year, Fundeb was made permanent by a constitutional amendment (with even an increase in the federal share from 10% to eventually 23% over coming years). Notably, Bolsonaro's government, facing public and legislative pressure, conceded to this expansion, and by July 2020 the National Congress approved the new Fundeb with higher federal contributions and provisions to direct more funds to poor regions. This was a victory for the structural equity approach – ensuring the principal mechanism for funding equality in basic education remained in place and even grew (OECD, 2020). It demonstrated policy continuity beyond politics, given Fundeb's significant participation in national investment in education.

Digital inclusion initiatives became crucial in 2020 when the pandemic hit. With schools closed for months, remote learning was the only option, exposing a severe digital divide. The government announced programs (e.g. "Aluno Conectado") to distribute SIM cards and expand connectivity for students, and some emergency funding for states to provide online content. However, implementation was irregular. Data from 2020 illustrate the challenge: about 82% of Brazilian schools had internet access, but this ranged from virtually all urban schools (98%) to barely half of rural schools (52%). In the North (Amazon) region, only ~51% of schools were online. Moreover, over a third of rural schools lacked any computers for students. Such disparities meant that many rural and favela students simply fell behind during remote schooling (Privacy International, 2022). The urban-rural educational gap risked widening as wealthier, connected areas could continue teaching, whereas remote communities had little access. Eventually, by late 2020, about 45% of public schools managed to implement some virtual learning environment, but dropout rates surged among disadvantaged groups (Privacy International, 2022).

From a theoretical standpoint, the pandemic underscored the importance of capability-enabling conditions (like internet connectivity) for education – a reminder that human capital cannot develop if students lack basic access to digital tools, which itself is a structural issue. Bolsonaro's education legacy by 2021 was therefore mixed: while he oversaw the continuation of Fundeb, his tenure saw no significant positive reform drive and instead was marked by contentious rhetoric and a reactive stance to crises. The policy instability in education reform hindered progress on key PNE goals. Notably, the target of having 50% of public schools offer full-day instruction by 2024 has seen scant progress, with authorities reporting a decline in the proportion of full-time lower-secondary schools since the goal's inception (OECD, 2024, p. 7). In sum, 2015–2020 was a period where economic constraints forced a retrenchment of the expansive policies of earlier years, and where political choices sometimes prioritized ideological considerations over equity The net effect likely stalled some of the poverty-and-inequality-reducing gains education had been contributing to.

As 2024 marks the end of the previous National Education Plan, Brazil is in the process of formulating a new PNE (2024–2034) to address unfinished programs and new challenges. The call to "update and relaunch" the PNE with targets aligned to equity, digital inclusion, and post-pandemic recovery, reflects lessons learned over the past decade. By 2023, under a new administration (with President Lula da Silva returning to power), the government saw the urgency to restore education as a national priority. The recognition that many PNE (2014–2024) goals were missed or only partially met was a driving force. Thus, the new plan is expected to double down

on educational equity (addressing learning gaps that widened in 2020–2021), digital infrastructure (so that all schools and students can benefit from online/blended learning), and quality improvements across the board. There is also an emphasis on inclusive education and well-being, acknowledging the socio-emotional toll of the pandemic (Edileuza Fernandes-Silva, 2025).

The new PNE discussions also incorporate a structuralist perspective on quality: instead of blaming teachers or students, there is analysis of systemic issues, such as the need for a national education system coordination, better management, and sustainable evaluation mechanisms Additionally, Brazil is evaluating its high school reform (passed in 2017, implemented in 2022–2023) which introduced a more flexible curriculum and vocational pathways. That reform, viewed by some as neoliberal (for encouraging early specialization and use of private course providers), has generated pushback and is under review by the current government (Edileuza Fernandes-Silva, 2025). The theoretical debates here face a human capital logic (the reform sought to better prepare high school graduates for employment) against the structuralist/humanist concern that it could exacerbate inequality between rich and poor students. The 2024 plan will likely seek to adjust the secondary school model to ensure a more equal and comprehensive education.
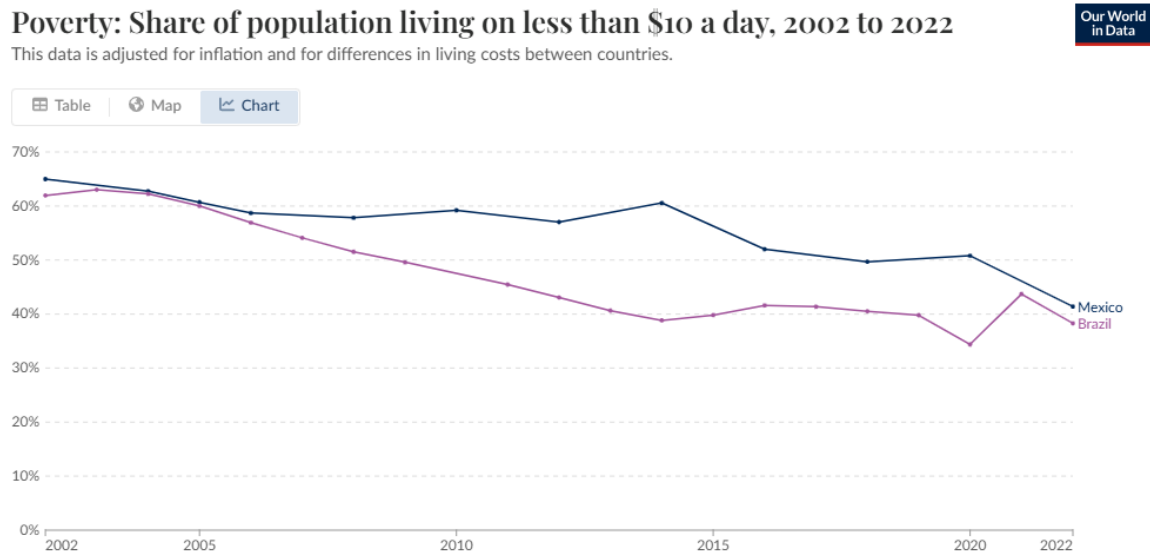
There is clear evidence that Brazil's past educational gains contributed to social progress, thus, the hope with the 2024-2034 National Plan is to revitalize this role of education as a driver of poverty alleviation and equality. That means not only getting kids in school, but ensuring they actually learn the skills (cognitive, technical, and socio-emotional) to improve their life chances. The new strategies therefore blend structural investments (e.g. expanding school meals, psycho-social support, infrastructure in needy areas) with human capital investments (teacher professional development, curriculum reform for 21st-century skills) and a capability lens (fostering inclusive practices so that marginalized groups – whether due to race, disability, or location – can thrive in school).

V. THE COMPARATIVE ANALYSIS – FACTORS DRIVING POLICY EVOLUTION

After completing the process tracing analysis presented in the previous section, the final part of the results focuses on a comparative analysis of the two cases/countries. This section applies structured criteria for cross-case comparison — including policy design systems, objectives, implementation and administration, beneficiary coverage, among others — to address the complexity of the study. It also examines selected indexes that help explain the evolution and continuity of the programs and policies discussed previously.

The following charts, show the poverty ratio due to the evolution of the share of population living with less than $10 US dollars during the last two decades (figure 5.1), and the Gini coefficient (figure 5.2) for both countries.

Figure 5.1 Poverty Rates

Poverty: Share of population living on less than $10 a day, 2002 to 2022
This data is adjusted for inflation and for differences in living costs between countries.
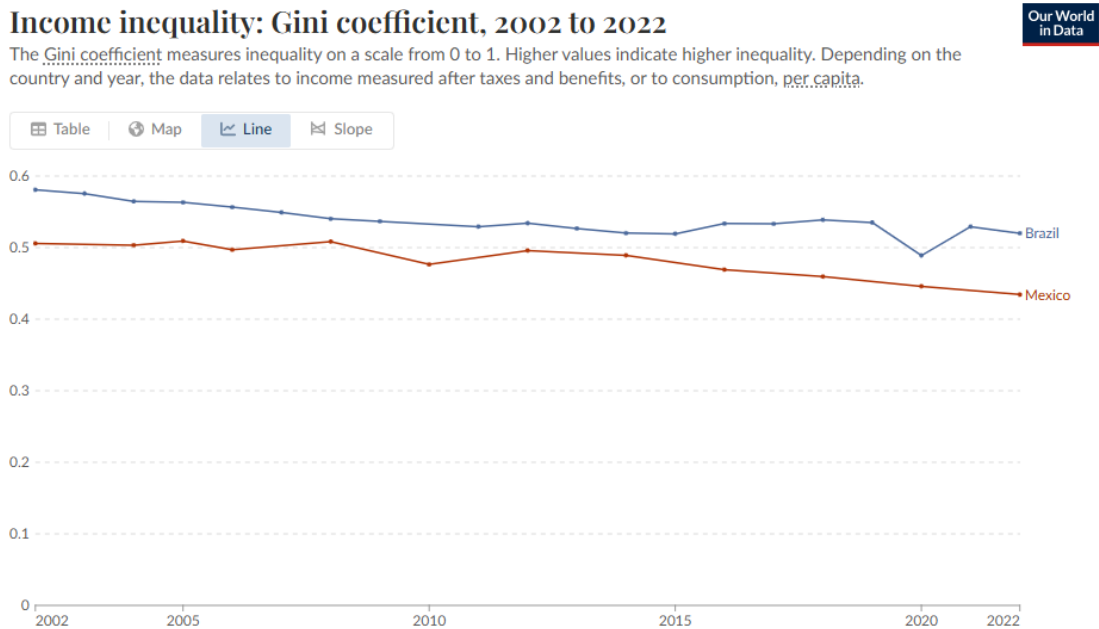
Source: (Our World in Data, 2022)

Regarding the poverty rate in Mexico, the most notable figures begin with a baseline of 65% in 2002. This figure gradually declined to 57%, before increasing again to 61% in 2014, likely as a result of the economic slowdown following the 2012 financial crisis and limited expansion of social protection at that time. By 2022, poverty had fallen to 41%, the lowest level recorded, largely due to the expansion of social programs under the administration of Andrés Manuel López Obrador (AMLO), such as Jóvenes Construyendo el Futuro and Becas Benito Juárez (scholarships for students), which increased direct cash transfers.

In the case of Brazil, the poverty rate was 62% in 2002, and it dropped significantly to 39% by 2014—a reduction of approximately 23 percentage points. This substantial decline reflects the impact of comprehensive poverty alleviation programs implemented under the governments of Lula da Silva and Dilma Rousseff, including Bolsa Família and broader social investments. In 2020, poverty reached its lowest point (34%), largely due to the temporary emergency cash transfer program (Auxílio Emergencial) launched during the COVID-19 pandemic under Bolsonaro's administration. However, this improvement was short-lived. As the emergency aid

was scaled back and austerity measures were reinstated in 2021, the poverty rate climbed again to 44%. By 2022, the figure had slightly improved to 38%.

Figure 5.2 Gini Coefficient

Income inequality: Gini coefficient, 2002 to 2022

The Gini coefficient measures inequality on a scale from 0 to 1. Higher values indicate higher inequality. Depending on the country and year, the data relates to income measured after taxes and benefits, or to consumption, per capita.

Source: (Our World in Data, 2022)

Analysing the income inequality trend through the Gini coefficient in the case of Mexico, income inequality has shown a gradual but steady downward trend over the past two decades. The Gini coefficient, which stood at 0.51 in 2002, experienced slight fluctuations but ultimately declined to 0.48 by 2010, and continued to improve, reaching its lowest level of 0.43 in 2022. This decline suggests moderate progress in redistributive efforts, possibly influenced by expanded social programs, minimum wage increases, and targeted transfers under successive administrations, particularly during AMLO's presidency, which prioritized reducing inequality through direct cash assistance and increased public investment in marginalized regions.

In contrast, Brazil has maintained persistently higher levels of inequality throughout the period. The Gini coefficient started at 0.58 in 2002 and showed only limited fluctuation over time. The lowest point was in 2020 (0.49), coinciding with the emergency cash transfers (Auxílio Emergencial) during the pandemic, which temporarily reduced inequality. However, this

improvement was not sustained, as the coefficient rose again after the program was scaled back. By 2022, the Gini remained relatively high at 0.52, showing that structural inequality continues to be a major challenge in Brazil.

The next table contains other important ratios, which support the explanation for the continuity of the main programs such as the CCT in each country and the main reforms in education

Table 5.1 Comparative Socioeconomic and Educational Indicators for Mexico and Brazil (2002−2023)

Index	Mexico – 2002	Mexico – 2023	Brazil – 2002	Brazil – 2023	Notable Trends / Changes
1. Coverage of Social Assistance (% of eligible population)	~20% of households reached by Progresa (~4.2 M households)	~25% of Mexicans under poverty line reached under Prospera (~26.6 M people)	~8 M people under pre-Bolsa Escola	~26% of population under Bolsa Família (~55 M people, 20 M families)	Large expansions in both programs; especially rapid growth in mid-2000s in Brazil.
2a. Mean Years of Schooling (HDI Education)	~7.0 years	~9.3 years	~5.6 years	~8.4 years	Mexico improved by ~2.3 years; Brazil improved by ~2.8 years — both showing steady educational progress.
2b. Expected Years of Schooling (HDI Education)	~12.4 years	~14.5 years	~13.2 years	~15.8 years	Both countries show strong gains, with Brazil gaining ~2.6 years and Mexico ~2.1 years.
3. Educational Attainment (Adult population)	~9–10% no schooling; ~60% basic only; ~7–10% tertiary	4.9% no schooling; 49.3% basic; 21.6% tertiary	63.2% no or incomplete primary; ~30% secondary; 6.8% tertiary	35.2% no/incomplete primary; ~46% secondary; 18.4% tertiary	Mexico saw a tripling of tertiary attainment from ~8% to ~22%. Brazil's tertiary attainment nearly tripled too from ~7% to ~18%; significant reduction in low-education population in both countries.
4. Regional Poverty Rates	Chiapas extreme poverty ~53%, vs Nuevo León 6%	By 2020, Chiapas still ranked poorest with 75.5% of its population in multidimensional poverty, compared to just 24.3% in Nuevo León	Poverty in the state of Maranhão in the Northeast region ~60% while Santa Catarina in the South only ~12%	By 2021, Maranhão remained among the poorest with ~54% of people living below the poverty line, versus Santa Catarina at just 10.16%	In both countries, deep-rooted regional poverty persists; social programs improved some outcomes, but major disparities remain (e.g., Chiapas vs Nuevo León; Northeast vs Southeast in Brazil).

Sources: Data compiled from official national statistics and international organizations, including CONEVAL, INEGI, IBGE and UNDP

Both Mexico and Brazil have undergone significant social and economic changes since the early 2000s. In the realm of social assistance, both countries massively expanded their cash-transfer programs, particularly during the 2000s. Brazil's Bolsa Família reached a larger share of the population earlier, while Mexico's Prospera also achieved notable coverage, especially among households living below the poverty line[27]. Education indicators given by UNDP improved considerably in both nations, with steady gains in mean and expected years of schooling and substantial increases in tertiary attainment. While Brazil started from a lower educational baseline, it recorded slightly larger relative improvements than Mexico. Despite these advances, deep regional disparities persist in both countries, economic growth and poverty reduction remain uneven, with poorer southern regions—such as Chiapas in Mexico and the Northeast in Brazil—continuing to lag significantly behind their more prosperous counterparts in north-central Mexico and the Southeast of Brazil.

After analysing the previous key indexes, the following table presents the full comparison between the two countries. It categorizes the main drivers of policy evolution and links them to the theoretical frameworks considered in this research — the Structuralist, Human Capital, and Capability approaches.

Table 5.2 Results of the comparative analysis – factors driving policy evolution

FACTORS	MAIN DRIVERS IN MEXICO	MAIN DRIVERS IN BRAZIL	LINKED THEORETICAL FRAMEWORK
Political ideology and governance style	Alternation between neoliberal/technocratic administrations (PAN, PRI) and left-wing universalist (MORENA) shaped both CCTs and education reforms. Under Peña Nieto (2013 reform), education policy followed a centralized, top-down approach with nationwide teacher evaluations and standardized curricula designed in the federal sphere with little local or teacher input — triggering strong union resistance in poorer and rural states. Under AMLO (2019 reform), the approach shifted toward more participatory and flexible curriculum	Left-wing governments (Lula, Dilma) expanded CCTs and implemented structural education policies (e.g., PNE 2014–2024, expansion of federal universities, ProUni). Under Temer/Bolsonaro, reforms moved toward efficiency and privatization (e.g., secondary education reform 2017), with Lula (2023–) aiming to reverse privatizing trends and strengthen public education.	Structuralism (role of state in reducing inequality); Human Capital (link between education and productivity); Capability approach (focus on inclusive, quality education).

[27] Poverty figures are based on each country's official national definitions: in Mexico, CONEVAL's multidimensional poverty measure, which combines income thresholds with deprivations in education, health, housing, basic services, and food access; and in Brazil, IBGE's income-based poverty thresholds, adjusted annually for inflation.

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FACTORS	MAIN DRIVERS IN MEXICO	MAIN DRIVERS IN BRAZIL	LINKED THEORETICAL FRAMEWORK
	design, aiming to reflect local contexts and reduce evaluation pressure, though still within a national framework.		
Institutional capacity and program design	CCTs: centralized design, strong national coordination, rigorous evaluation ensured continuity. Education reforms: centralized curriculum control, major resistance from teachers' unions when reforms lacked consultation. Recent shift toward participatory reform (AMLO) but with limited resources.	CCTs: federal funding, municipal implementation enabled local adaptation. Education: decentralized implementation through states/municipalities; policies tied to long-term national plans (PNE). Federal support programs (e.g., ProUni, FIES) complemented public provision.	Structuralism (addressing regional inequalities); Human Capital (education/CCTs as investments); Capability approach (institutional focus on equitable access).
Socioeconomic context and structural barriers	Rural and indigenous communities face persistent access barriers to schools and health facilities, limiting CCT conditionality compliance and education reform impact. Infrastructure gaps and teacher shortages undermine education quality.	Regional disparities (North/Northeast poorer, lower educational outcomes); racial inequalities in school attainment and labour market integration. Infrastructure and teacher training deficits hinder national goals despite expanded access.	Structuralism (historical marginalization); Capability approach (addressing access and quality gaps).
Policy objectives and evolution	CCTs: from human capital accumulation (Progresa–Prospera) to productive inclusion (Prospera) and unconditional support (Bienestar). Education: reforms aimed at improving teacher evaluation and accountability (2013) shifted to social inclusion and curricular flexibility (2019).	CCTs: from targeted poverty alleviation (BFP) to integrated social inclusion (Brasil Sem Miséria). Education: expansion of higher education and quotas, universalizing early childhood education, vocational pathways in secondary school (2017), under review in 2023–2024.	Human Capital (conditionalities and skills formation); Capability approach (universal access, curricular relevance); Structuralism (broad social inclusion).
International influence and commitments	CCTs: global recognition of Progresa's model reinforced continuation. Education: OECD/PISA results influenced competency-based curricula; UN commitments on SDG4 shaped recent reforms.	CCTs: BFP model showcased globally; strong exchange with international organizations. Education: PNE commitments aligned with UNESCO/Education 2030 agenda; PISA/OECD benchmarks influenced policy adjustments.	Human Capital (evidence-based design); Capability approach (alignment with global education rights); Structuralism (international

FACTORS	MAIN DRIVERS IN MEXICO	MAIN DRIVERS IN BRAZIL	LINKED THEORETICAL FRAMEWORK
			cooperation in unequal contexts).

Sources: own elaboration

VI. CONCLUSIONS AND FINAL CONSIDERATIONS

Drawing on the work of influential scholars such as David Hulme, Celso Furtado, Gary Becker, and Amartya Sen, this study has demonstrated how policymakers in Mexico and Brazil have incorporated different theoretical perspectives into the design and evolution of flagship programs like Brazil's Bolsa Família and Mexico's Prospera to combat poverty and inequality. The analysis also assessed the strengths and limitations of the Structuralist, Human Capital, and Capability approaches in addressing the complex and multidimensional nature of poverty in the Latin American context.

From a structuralist perspective, a persistent critique is that while policy frameworks and formal rules have evolved, the underlying conditions that impede learning—such as poverty, malnutrition, isolated communities and overcrowded classrooms in rural areas—remain largely unaddressed, limiting the capacity of reforms to reduce inequality. This view is consistent with the CEPAL/ECLAC (Economic Commission for Latin America and the Caribbean) (2022) report *Towards Transformation of the Development Model in Latin America and the Caribbean: Production, Inclusion, and Sustainability*, which calls for a transformative development model capable of tackling structural inequalities while promoting inclusive and sustainable growth. In both Mexico and Brazil, structuralist principles have influenced social policy design, particularly in efforts to reduce inequality. For example, Bolsa Família sought to narrow income gaps but faced constraints imposed by broader macroeconomic conditions. Likewise, Mexico's early import substitution industrialization policies reflected structuralist objectives but were attenuated by global economic pressures, often resulting in mixed outcomes.

In Mexico, education reforms over the past two decades have oscillated between human capital-driven strategies and structuralist/capability-oriented approaches. The 2013 reform epitomized a human capital logic by treating education primarily as an input for economic growth, prioritizing efficiency, standardized evaluations, and teacher performance metrics. However, this technocratic approach largely overlooked the structural inequalities—such as rural poverty, ethnic

disparities, and infrastructure deficits—that limit equal opportunities, reducing its overall impact on poverty reduction. In contrast, the reforms introduced under President López Obrador in 2019 reflect structuralist and capability principles, aiming to remove systemic barriers through expanded scholarships, community-based curricula, and culturally relevant content. Education in this framework is seen not only as a means to build skills for the labour market but also as a way to expand individual freedoms, dignity, and social inclusion.

Continuity in scholarship programs—from Progresa/Oportunidades to Becas Benito Juárez—has been fundamental in improving access for disadvantaged groups, contributing to a slowdown in inequality growth. Nonetheless, inconsistent improvements in quality and frequent policy reversals, often driven by political changes rather than educational needs, have hindered the long-term benefits of reform. These patterns suggest that sustained progress will require a synthesis of approaches: tackling deep-seated inequities in resources and socio-economic conditions while simultaneously investing in high-quality teaching and learning.

In the case of Brazil's education reform path from 2001 to 2024 similarly reveals the interplay of multiple development approaches. The structuralist perspective is reflected in initiatives like Fundeb, which addressed inequities in school funding, and in the constitutional guarantee of education as a right. These measures produced tangible poverty-reducing effects, particularly in historically disadvantaged regions such as the Northeast, where literacy rates and school attainment improved in the 2000s. The human capital approach inspired programs such as PRONATEC and FIES, which sought to expand technical skills and higher education access to increase productivity and innovation. Over time, this focus prompted greater attention to quality and relevance, including national learning assessments and closer alignment between technical education and labour market needs.

The capability approach is evident in inclusive policies like ProUni, intercultural education for Indigenous communities, and curriculum reforms addressing gender and racial equality. These initiatives recognize education's intrinsic value in expanding individual choices and agency, beyond its instrumental role in raising incomes. Although Brazil has achieved significant gains in access and reduced educational inequality—contributing to a notable drop in the Gini coefficient from the 1990s to the mid-2010s—learning quality has lagged, limiting productivity gains. Current policy priorities acknowledge that quality with equity is the central challenge, requiring continued structural investment, effective human capital policies, and a capability-oriented vision. The PNE 2024's emphasis on digital inclusion illustrates this integrated approach, aiming to close the digital

divide (structural fix), develop 21st-century skills (human capital), and broaden learning opportunities (capabilities).

In both countries, the recent stagnation in inequality reduction is largely structural in nature, requiring long-term strategies and political stability. While current programs incorporate elements of human capital and capability approaches, neither Mexico nor Brazil has fully implemented the deep structural reforms necessary for transformative change. Political ideology remains decisive: left-leaning governments tend to prioritize redistribution, welfare, and inclusion, whereas right-leaning administrations often emphasize fiscal austerity, economic liberalization, and market-driven reforms. Economic cycles further condition the trajectory of social policy, with growth periods enabling expansion and downturns reinforcing budgetary restraint. The sustainability of reforms depends on a balance between political will, fiscal capacity, and institutional resilience.

For future policy design, both countries could benefit from exploring more integrated social protection models that combine universal social insurance with targeted assistance programs. In this regard, Brazil's approach offers some advantages. While Bolsa Família provides an unconditional cash transfer to a broad segment of low-income households, it maintains conditionalities—such as school attendance and health check-ups—for beneficiaries seeking additional subsidies, thereby preserving incentives for human capital development. In contrast, Mexico's Bienestar program removed conditionalities altogether, which, although consistent with a universal rights-based approach, risks weakening the original rationale of the CCT model and diminishing incentives for sustained investments in education and health. Without these behavioural components, there is a concern that the programs' long-term capacity to foster human capital accumulation—and thus break cycles of poverty—may be compromised. This distinction between the two models warrants further comparative research, as it raises important questions about the balance between universality, conditionality, and developmental impact in social assistance design.

In conclusion, the experiences of Mexico and Brazil underscore that reducing poverty and inequality in a sustainable way requires more than isolated policy innovations. It demands the integration of structural reforms to address entrenched inequities, human capital investments to improve skills and productivity, and a capability-focused vision that expands freedoms, dignity, and social participation. This synthesis offers the most promising pathway for translating reforms into lasting gains in social inclusion, economic opportunity, and equality.

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KAREN: Gracias. Bueno, entonces me presento rápidamente. Bueno, primero quiero agradecerte por haber aceptado la invitación y pues por abrirme el espacio de esta media horita para poder conversar contigo.

Como les decía en el correo que les envié, pues yo soy colombiana, estoy haciendo mi máster aquí en Lisboa en Economía Política, ya estoy terminando y pues el máster lo estoy haciendo un estudio de caso comparado entre Brasil y México sobre la evolución de políticas sociales enfocadas políticas y programas sociales enfocados en reducción de pobreza y reducción de desigualdad de ingresos. Estoy haciendo un estudio, digamos, pues de la evolución en estas dos dimensiones desde los últimos 20 años, entonces en México desde el gobierno de Vicente Fox hasta pues el gobierno que terminó ahorita Andrés Manuel López Obrador. Entonces, bueno, esa era como pues para ponernos un poco en contexto.

Yo te compartí como las preguntas, más o menos les hice ahorita unas mejoras para unificarlas, pues sobre lo que queríamos y pues también les compartí, voy a volver aquí a compartir, como digamos una línea de tiempo que había hecho, digamos, en lo que llegó de la investigación, pues sobre todo de las transferencias condicionadas de efectivo y pues digamos en general para los temas de, digamos, de educación, lo que vi y digamos pues que era como más conveniente para mí no era enfocarme en sí, como en un programa específico, porque han cambiado mucho y sí, digamos, podía hacer un análisis más profundo en, digamos, las reformas que ha tenido como tal todo el sistema, digamos, en los últimos 20 años, porque como hay transiciones de gobiernos de izquierda, derecha, centro, entonces pues hay cambios interesantes para analizar. Entonces, bueno, ¿no sé si hasta aquí alguna pregunta o tienes tú algo de tu parte?

GRACIELA: No hay ninguna pregunta, o sea, yo no soy tan experta en la parte de educación, o sea, de los cambios así específicos que se hicieron en educación, o sea, más bien lo único que sé es como muy, cuestiones muy generales que te puedo contar de la parte de educación. Sí te puedo hablar del tema de los programas de transferencias condicionadas, eso sin ningún problema.

KAREN: Ok, listo, no, está perfecto, igual los aportes que me puedas dar pues supremamente valiosos, entonces, bueno, pues tengo aquí las preguntas pues como planeadas, igual la idea es que son preguntas abiertas y pues si de pronto pues se dan otros temas que tú consideres relevantes para mí, pues como mi investigación, pues son bienvenidos. Listo, entonces, bueno, como para retomar un poquito, digamos que la pregunta de investigación que yo estoy tratando de responder es justamente eso, o sea, pues cuál ha sido la evolución de estos programas y digamos que como es apenas una tesis de maestría, no estoy mirando implementación de impacto porque pues era, es difícil medirlo y pues no me daba el tiempo para hacerlo, pues en este momento. Entonces, bueno, empezamos.

La primera pregunta que tengo es, ¿cómo describiría usted la evolución de los programas de transferencias condicionadas en México desde la creación de Progresa hasta el actual programa

de Bienestar? Aquí pues teniendo en cuenta cuáles son los factores más determinantes en la transformación de este programa a lo largo del tiempo, entonces son, digamos, ideología política, son temas presupuestales y de contexto económico y fiscal en el país. Es evidencia técnica, es presión internacional, entonces pues como un poquito, ¿cuáles han sido estos drivers para que el programa se transforme de lo que inició a pues lo, como está hoy en día?

GRACIELA: Yo te voy a decir, este, obviamente mi perspectiva, desde mi punto de vista, ¿qué es lo que yo pienso? Antes del programa Progresa, que así se llamó el primero de transferencias condicionadas en México, no había en México programas de transferencias condicionadas. Había programas de transferencias y de todo tipo, o sea, transferencias monetarias y transferencias no monetarias.

Y realmente en esa época, antes de este programa, no había tampoco un interés por medir si los programas tenían o no algún resultado, alguna derrama, algún impacto. Simplemente se daban los programas y muchos de estos programas se otorgaban con fines clientelares, con fines para obviamente quedar bien, para favorecer a ciertos partidos políticos, dependiendo del partido político que estaba ahí en turno, ¿no? Cuando llega Progresa, llega con un equipo técnico que es quien lo pone en marcha en el gobierno de Ernesto Zedillo y llega como que con un propósito muy claro. O sea, primero tenía cierto diseño y este diseño estaba documentado en una revista que escribió el doctor Santiago Levy, quien fue subsecretario de Egresos y él básicamente diseñó este programa en papel.

Y justamente abogaba de que estas transferencias tenían que condicionarse para que realmente dieran resultados. Entonces, por primera vez en México, se pasa de dar transferencias sin tom y son a tener un programa que estaba perfectamente diseñado, que tenía tres componentes en aquel entonces, como muy claros, el componente de nutrición, el componente de educación y el componente de ingreso, ¿no? Ahora, en ese momento, justamente, pues había todo este tema de que tenían que condicionarse los recursos que recibirían las familias a la asistencia escolar de los chicos. En aquel entonces, no me acuerdo muy bien, pero empezó nada más creo que en primaria, después se fue extendiendo a secundaria y después ya se extendió de forma más amplia.

Pero cuando inicia, inicia en el nivel inferior de educación y había también montos diferenciados, se les daba más recursos a las niñas de lo que se les daba a los niños porque las tasas de decepción eran más altas en las niñas que los niños. Entonces, para aumentar el costo de oportunidad de no ir a la escuela, se les aumentaba el monto, era mucho más grande para las niñas. Entonces, era un programa que sí estaba diseñado para que cumplieran con ciertos condicionantes las familias para recibir justamente el beneficio.

Ahora, ¿qué pasaba en la práctica? O sea, una cosa es lo que estaba en diseño, hecho conceptualmente y en papel, y otra cosa es qué pasaba en la práctica. En la práctica, obviamente este programa empieza en zonas rurales primero, luego se pasa a zonas semiurbanas y luego a zonas urbanas. Las zonas rurales en donde comenzó eran zonas rurales muy pobres.

Entonces, esta parte de ser condicionadas o de condicionarlas al cumplimiento de ciertas actividades, en la práctica realmente no funcionaba. Porque, ¿qué pasaba? Si los niños no iban a la escuela o no iban a la escuela con cierta periodicidad, las maestras no querían notificarlo porque notificarlo automáticamente se convertía en una baja, en que iban a sacar a los niños o iban a sacar a la familia del programa porque no estaban cumpliendo con los condicionantes. Entonces, este condicionamiento pues era un poco medio entre comillas, ¿no? Y también lo mismo pasaba con los chequeos de salud.

O sea, se tenían que hacer con cierta regularidad, cierta periodicidad, tenían que pasar por ahí los miembros del hogar, pero si no lo hacían, pues tampoco es que el personal de salud fuera a acusar o a denunciar. Entonces, cuando tú ves en la práctica cuánta gente salía del programa por no cumplir con los condicionantes, pues era bajísimo, ¿no? Era bajísimo. Entonces, bueno, empieza este programa y una de las cosas que desde mi punto de vista fue muy novedoso y que después repercute en la supervivencia de este programa de transferencias condicionadas fue que efectivamente se hizo una evaluación de impacto.

Entonces, al mismo tiempo que se implementa el programa, se diseña y se pone en marcha un diseño de evaluación cuasi-experimental, ¿no? Entonces, se tienen los grandes censos de estas localidades. Lo que se hace es, con información del censo, se eligen qué localidad se va a trabajar, se eligen obviamente las localidades más vulnerables, más pobres para trabajar, que tuviesen obviamente clínicas y que tuviesen infraestructura educativa. Si no, las localidades más pobres que no tenían escuelas o que no tenían centro de salud ni siquiera pudieron entrar.

Entonces, las más pobres de las pobres, pues obviamente fue una de las grandes críticas de este programa, pues no entraron por no contar con infraestructura. Pero las que sí tenían esto, se hizo una selección aleatoria entre comunidades y dijeron, bueno, estas comunidades aleatoriamente van a participar en el programa, estas otras comunidades aleatoriamente son idénticas estadísticamente, no van a participar en el programa. Y se empieza una recolección de datos cada seis meses, aprox., para ir viendo cómo iban cambiando indicadores clave que les interesaba al programa Medir a lo largo del tiempo por recibir el programa y por no recibir el programa.

De esta manera, se va empezando una evaluación de impacto que después continúa a lo largo de los años y se van midiendo los resultados en los tres principales componentes, en nutrición, en indicadores educativos y otros indicadores de consumo que se esperaba se movieran a partir de las transferencias que estaban recibiendo los hogares. Y bueno, empezaron obviamente a salir los primeros resultados antes del cambio de sexenio al siguiente sexenio, de Fox pasó, bueno, de Cedillo primero pasó a Fox y luego de Fox después pasó a la presidencia de Felipe Calderón y bueno, y luego obviamente Enrique Peña. Pero fue clave para esta primera transición la información de que el programa había efectivamente tenido estos resultados positivos.

No me acuerdo cuándo había sido, pero había sido aproximadamente, había generado como que un año más de educación comparado a las comunidades de tratamiento con el control y también había hecho que los niños crecieran no sé cuántos centímetros y que mejoraran sus niveles de

hemoglobina en la sangre, no sé qué porcentaje, pero habían tenido aspectos positivos. Cuando se llevan estos resultados al Congreso es muy difícil cerrar el programa y es muy difícil cerrar el programa porque el programa estaba documentando y pues obviamente evidenciando resultados positivos y esto de tener esta evidencia tan contundente fue lo que hizo que el programa se quedara. Lo único que pasó fue básicamente cambios de nombre a lo largo de los sexenios, pero el programa en su parte conceptual se mantuvo bastante igual a lo largo del tiempo, aunque se le fueron poniendo cositas.

O sea, después se fue incrementando una parte que iba direccionada para adultos mayores, después también una transferencia adicional para cierto tipo de hogares que eran distintos y se le fueron poniendo como que distintos componentes, pero los tres componentes principales se mantuvieron. Se fue también expandiendo el apoyo a niños que ya estaban en otras edades escolares, en otros grados escolares y bueno, se fue modificando a lo largo del tiempo. Pero este componente de tener justamente la evidencia de que funcionaba y que no funcionaba fue fundamental para que se fuera quedando a lo largo de los distintos sexenios, excepto cuando viene el presidente López Obrador.

Entonces, este tipo de política social que se siguieron durante cuatro sexenios fue una política social que le denominan pues neoliberal, en donde se utiliza obviamente pues información estadística, evidencia que fue tanto evidencia cuantitativa como cualitativa. Entonces, se hizo un movimiento de impuestos, pero también se hizo mucho trabajo cualitativo para evidenciar efectivamente cuáles eran los cambios y cómo estaba impactando la vida de las personas este tipo de intervenciones. Entonces, sí, se tenía toda esta evidencia, fue un programa que cambió poco realmente a lo largo del tiempo, pero que también diría yo, tuvo poco impacto en cambiar las cifras de pobreza.

O sea, sí había resultados en términos de la pobreza alimentaria, dependiendo cómo la midieras, porque en algún tiempo se medía con líneas de pobreza de ingreso y después ya se medió de manera más multidimensional. Pero realmente este tipo de intervenciones, digamos, que tuvo impacto en reducir la pobreza, pero no fueron impactos tan grandes. No fueron impactos, yo diría, más pequeños.

Cuando llegue el presidente López Obrador, el presidente López Obrador obviamente no le gustan las políticas neoliberales, no le gustaba absolutamente que hubiera programas condicionados. Él lo que quería era repartir dinero por doquier sin pedir absolutamente nada a cambio, sin ningún tipo de accountability. O sea, de hecho, pues empezó a repartir efectivo sin ningún tipo de condicionante, sin recabar información de qué estaban haciendo los hogares con este efectivo, con estas transferencias.

No le importó al gobierno y lo único que le importaba era obviamente hacer ese tipo de transferencias, que empezó con este programa, que después fue ya muy importante con Universal, que es el programa Juntos Mayores, y luego el programa de jóvenes, programa de becas. Pero todos estos programas que el presidente López Obrador fue implementando, pues

eran programas de transferencias no condicionadas y donde no se mantiene como un requisito importante el recolectar evidencia de si funcionan o no funcionan. Ok.

Bueno, de todo lo que dijiste. No sé si esta es la parte de lo que quieres contestar o no, pero bueno.

KAREN: No, no, no, está buenísimo. Es mucha información, es supremamente valiosa para mí. Pero entonces, bueno, dentro de lo que yo he leído un poco, digamos, de los desafíos de este tipo de programas, es que son cortoplacistas y asistencialistas y están un poco desligados de un programa de social insurance universal. O sea, cómo yo vinculo esto que es asistencialista con seguridad social, que tiene que ver con, digamos, una visión más de largo plazo para, digamos, poder conseguir unos resultados.

GRACIELA: En México no hay un sistema de seguridad social universal. Hay un sistema de seguridad social universal para los que trabajan. Para los que no trabajan hay un sistema de protección social.

Entonces, por ejemplo, los programas de adultos mayores, esas transferencias, pues son pensiones, pensiones que reciben los adultos mayores que, bueno, han ido aumentando a lo largo del tiempo. Empezaron siendo pequeñas, de 500 pesos por adulto mayor, y después fueron incrementando los montos hasta acercarse a la línea de pobreza. Para que un adulto mayor saliera de la pobreza, el monto de la transferencia que recibía de esta pensión no contributiva, pues fue incrementando a lo largo del tiempo.

Entonces, a diferencia de los programas de transferencias condicionadas, los programas de transferencia condicionadas tenían esta lógica de un círculo virtuoso. Era un círculo virtuoso porque los niños iban a la escuela, invertían en capital humano, recibían un chequeo de salud, recibían intervenciones tipo, por ejemplo, papillas para mejorar la nutrición, para que pudieran estar mejor nutridos y entonces aprovecharan más la intervención educativa que tenía que ver con la asistencia escolar, con el fin de que cuando ellos llegaran a la adultez, tuvieran mejores condiciones, estuvieran mejor preparados para tener un mejor ingreso. Entonces, sí era como que un círculo virtuoso que hacía que se pudiese romper como este círculo de la pobreza en las cuales vivían las generaciones con intervenciones.

Y el tema es que, efectivamente, pues este tipo de programas le apostaban a esta inversión en capital humano, que iba a rendir frutos en la siguiente generación. Los programas asistencialistas del presidente López Obrador no le interesa la inversión en capital humano, no le interesa la inversión en los objetos, o sea, más bien lo que está haciendo es repartir dinero. Repartir dinero, pues con miras a tener asegurado a la clientela para las votaciones siguientes, ¿no? Y si tú te fijas, bueno, tenemos pocos puntos, pero en la última medición de pobreza de México sí se logró sacar a un grupo significativamente alto de pobreza repartiendo dinero.

O sea, sí es un tema de ingresos que, de alguna manera, pues está siendo efectivo en términos de combate a la pobreza. Yo creo que es efectivo en términos de combate a la pobreza, es más

bien coyuntural, pero no podemos estar seguros de que esta reducción de la pobreza vaya a ser permanente, porque realmente no hay, no se está invirtiendo en activos. Realmente lo que se está haciendo es asistencialismo puro.

KAREN: Sí, justamente, pues ya no nos queda mucho tiempo, entonces pues vamos.

GRACIELA: Ya me tengo que ir a mi sitio de contacto.

KAREN: Sí, sí, exacto, tranquila, ¿no? El tiempo vuela, entonces vamos ya como cerrando.

Sí, justamente entonces era sobre ese tema, la última pregunta que quería hacerte era eso. O sea, ¿qué piensas de estos temas, o sea, de esta migración que tuvo el programa a este modelo de una asistencia sin condiciones? Entonces, pues parte de lo que decías era que funciona, pero como una medida, lo mismo, asistencialista, cortoplacista.

GRACIELA: Yo creo, a ver, yo creo que lo que habría que pasar, lo que tendría que pasar, Karen, es que todas las políticas, todas las intervenciones que hagan los gobiernos tienen que evaluarse.

Entonces, sí, efectivamente, a lo mejor este tipo de transferencias están siendo muy eficaces para aumentar el ingreso momentáneo y disminuir la pobreza, pero es una disminución de pobreza artificial. Que no tiene efectos duraderos y permanentes en mejorar las condiciones de vida de las familias. Entonces, lo que tendría que estar pasando es que este tipo de intervenciones se tendrían que estar evaluando para ver para qué sí sirven y para qué no sirven.

Y hacer una revisión de política social y decir a dónde le quiere apostar México. ¿Le quiere apostar mejor a no sacar a la gente pobreza en el corto plazo, pero sí en el largo plazo? ¿O quiere nada más mejorar artificialmente los ingresos de las personas a corto plazo, pero no darles las herramientas para salir de la pobreza de forma permanente?

KAREN: Bueno, encantada de conocerte y muchísimas gracias por ayudarme.

GRACIELA: Igualmente, espero que te haya sido útil.

KAREN: Sí, sí, muchísimo. Bueno, que tengas una buena tarde para ti. Gracias, hasta luego.

GRACIELA: Vale, chao.

APPENDIX B – Interview with Francisco Menezes

KAREN: Gracias. Bueno, entonces me presento rápidamente. Bueno, primero quiero agradecerte por haber aceptado la invitación y pues por abrirme el espacio de esta media horita para poder conversar contigo. Como le decía en el correo que les envié, pues yo soy colombiana, estoy haciendo mi máster aquí en Lisboa en Economía Política, ya estoy terminando y pues el máster lo estoy haciendo un estudio de caso comparado entre Brasil y México sobre la evolución de políticas sociales enfocadas políticas y programas sociales enfocados en reducción de pobreza y reducción de desigualdad de ingresos. Estoy haciendo un estudio, digamos, pues de la evolución en estas dos dimensiones desde los últimos 20 años especialmente en el tema de transferencias condicionadas.

La primera pregunta que tengo es, ¿cómo describiría usted la evolución de los programas de transferencias condicionadas en Brazil desde la creación de Bolsa Escola and Bolsa Alimentacao hasta el actual programa de Bolsa Familia? Aquí pues teniendo en cuenta cuáles son los factores más determinantes en la transformación de este programa a lo largo del tiempo, entonces son, digamos, ideología política, son temas presupuestales y de contexto económico y fiscal en el país. Es evidencia técnica, es presión internacional, entonces pues como un poquito, ¿cuáles han sido estos drivers para que el programa se transforme de lo que inició a pues lo, como está hoy en día?

FRANCISCO: Perfect. Bien. Eh, es preciso tener en claro que en caso de Brasil, eh, la cuestión de la pobreza está muy, eh, involucrada con la cuestión de las desigualdades. Eh, las desigua-- Brasil es un país, eh, de desigualdades muy, eh, profundas, muy intensas.

Y en este aspecto, eh, podemos decir, en nuestro punto de vista, que la pobreza, eh, solamente se... se tendrá, eh, resultado, ¿no? Eh, si, si, eh, logramos enfrentar las, las desigualdades, que son muchas, mais hay una desigualdad de ingresos, eh, muy profunda y desigualdades raciales, de género, eh, que, que, se-- de, de regionales, ¿no?

Que, eh, hacen las bases de esta situación de pobreza. Ahora, eh, es necesario, como tú habías, eh, hablado, que, eh, precisamos pensar, eh, los diferentes contextos, eh, ideológicos y políticos de, de la cuestión de poder. Entonces, eh, hasta, eh, el final de los años, eh, noventa, eh, hubo algún enfrentamiento, eh, de la pobreza, ya con expre-- con experiencias de, eh, transferencia de ingreso en, en ciudades o, o en, en áreas, eh, limitadas, con algunos suceso, principalmente en São Paulo, Campinas, eh, depois la propia ciudad de São Paulo.

Esto de un lado. En Brasilia hubo un importante programa con gobernador, que era identificado con el Partido de los Trabajadores, eh, que era el Bolsa Escuela, que entonces era una transferencia de ingresos para, eh, las familias que tenían los hijos, eh, en, en, en las escuelas con alguno controles sobre esto.

Esto, entonces, son, eh, lo que estoy diciendo muy rápidamente es que hubo experiencias locales que dieron las bases para las bolsas familia. Entonces, eh, en el inicio de los años 2000, cuando

hay las elecciones y el presidente Lula es electo, había una, eh, un ob-- objetivo principal, eh, en su gobierno.

Y, y, y yo tuve, yo no fui del gobierno, pero estuve muy, eh, cercano, eh, de estas experiencias. Había un objetivo principal de enfrentamento del hambre en ese momento. Entonces, con la e-elaboración y, y, y aplicación de políticas públicas de enfrentamento, eh, del ha-hambre, pero también, eh, de transferencia de ingresos, porque se, se tenía, eh, como evidente que, eh, el principal problema que causaba el, el hambre era la, la falta de ingresos, ¿no?

La insuficiencia de ingresos de una grande cantidad de familias para, ah, adquirir o mismo tener condiciones de producir sus propios alimentos, ¿entendés? Entonces, creo que, eh, el, eh, usted habló de los últimos veinte años y esto fue la base impulsionadora, eh, del enfrentamiento de la pobreza en Brasil.

Yo me acuerdo que el presidente Lula, en su discurso, eh, cu-cuando, cuando habló, eh, para las, para los brasileños, su objetivo principal, eh, del gobierno en 2003, eh, tendría, eh, garantizar, eh, la alimentación por lo menos tres veces al día para todos los brasileños.

Entonces, el presidente tenía esto muy fuerte. Eh, eh, a-ao lado de esto, y puedo ya, eh, ad-adelantar para ustedes un aspecto que no es muy, eh, eh, comentado, eh, en lo que se escribió. Cuando el gobierno fue electo, había una discusión si de-- deb-- si, eh, el programa de transferencia de ingresos debería ser un programa solamente para garantizar la alimentación o debería ser, ser, eh, un programa donde los que recibirían los beneficios, eh, podrían decidir lo que hacer con...Con el, eh, el ingreso transferido. Esto fue en la discusión del planeamiento, eh, del gobierno. Una discusión que inicialmente definió, entonces, qué tendría un programa de transferencia de ingresos para la alimentación. Esto valió en el primero año. Eh, sí, habían, entonces, cuatro programas de transferencia de ingresos de los gobiernos anteriores, eh, lo que llamaba Vale Alimentación, eh, después, eh, eh, Bolsa Escuela.

Sí. Eh, Vale Gás. Y, con el nuevo gobierno, Cartão Alimentación, que sendría un cartón donde se podería, eh, comprar comida. Eh... Sí, porque el Vale Alimentación, que yo he hablado antes era un programa de Ministerio de Salud para garantizar nutrición adecuada para, eh, los niños, principalmente.

Entonces, había cuatro programas. Hubo una dificultad de implantación de este programa del cartón de alimentación. Voy a hablar para usted, por ejemplo, que los comerciantes, los que vendían o-los alimentos... Eh, yo no sé si estoy hablando bien en español.

KAREN: Sí, perfecto, perfecto, perfecto.

FRANCISCO: Tenía, eh, la, la tarjeta, eh, de, de, del cart-- que llamábamos del cartón.

KAREN: Sí, yo entiendo, yo percibo casi todo también en portugués.

FRANCISCO: Sí, tenían en su, en sus, eh, tiendas los cartones, eh, y con eso tenían un cierto poder sobre las familias, eh, en esta situación. Y hubo, eh, en octubre de 2003 la substitución,

entonces, eh, del cartón de alimentación y de todos los otros programas de transferencia de ingresos, la...

El Vale Alimentación, Vale Gás y Bolsa Escola, por un único programa de transferência de ingreso, que fue el Bolsa Familia. Entonces, vea bien, eh, la posición primera, que era de mantener los tres otros programas y tener más un cartón de alimentación, fue, eh, vencida, ya no más, eh, prevaleció en octubre de 2003 con el programa Bolsa Familia siendo creado, en ese sentido.

El programa, yo podría decir que ellos tenían un... Un cadastro, no sé si esta es la palabra en español, con la relación de las familias, de los titulares de programa que deberían recibir. Pero este cadastro tenía muchos problemas. Venía del gobierno anterior y había muchas-- muchos errores, vamos a decir así, en ese cadastramiento. Entonces, lo... Yo diría, en los dos primeros años de Bolsa Familia, hubo un esfuerzo muy grande de, eh, eh, eh, obtener un cadastro más real. Sí. Más verdadero en la identificación.

KAREN: Más confiable también, supongo.

FRANCISCO: Más confiable, eso. Más confiable. Hubo un problema político en ese sentido, porque con la implantación de Bolsa Familia, una parte, de, de la media, de los medios, eh, tenían una posición de, de crítica en relación al gobierno y, eh, lograron identificar casos de familias que no deberían estar en Bolsa Familia y también otros, otras familias que deberían estar ahí y no estaban.

FRANCISCO: Ese, eh, ese fue, fue un tiempo de muchos, eh, muchas dificultades en esta implantación. Pero como decía, el cadastro fue, se, eh, cambiando para una forma más, eh, adecuada y esto fortaleció el programa, incluso ya con algunos reconocimientos internacionales, incluso del propio Banco Mundial, en rela-- en relación a que estaba llegando en las familias, eh, que tenían mayores necesidades.

Un otro aspecto importante en el nacimiento del programa es que hubo una contestación sobre el hecho que el programa, eh, tenía las exigencias de, primero, eh, los hijos en la escuela y después de, de comparecimiento, de estar en los, lo-- las unidades de salud para verificación de su situación. Y había una...Una

discusión que yo diría que era un poco académica. Eh, si el programa era un programa que confería derechos, no podría, eh, tener exigencias sobre de, de esta modalidad. Entonces, esto fue un otro punto de, de, de...

KAREN: Discusión.

FRANCISCO: Sí, entre, eh, en na-- en esa cuestión. Pero el Gobierno man-mantuvo, eh, las exigencias de escuela y salud. Sí. Eh, bien, yo hasta hablando en términos de experiencia personal, yo tenía una relación personal fuerte con las personas que estaban, eh, conduciendo, estaba afuera ente del programa y ellos decían sobre esto que en la verdad no estaban, eh, sacando fuera las familias que no lograban cumplir las obligaciones, mas que había un, una importancia de mantener la cuestión de escuela y salud porque esto permitía al gobierno llegar

hasta las escuelas y hasta la-- las unidades de salud para saber por qué no estaban siendo cumplidas las exigencias.

KAREN: Y, y digamos que, bueno, eh, profundizando un poco en esto que está comentando, eh, ¿considera usted que el objetivo principal en la reducción de la pobreza a través de estos programas de transferencias condicionadas, eh, sí se ha cumplido? En, en qué-- y si sí, ¿en qué medida? ¿Qué más se puede hacer? Y eso primero. Y respecto a lo segundo, es cuando hacen este análisis de por qué no se cumple la condición, por ejemplo, que no pueden asistir a la escuela o a lo, o a lo, o a la clínica, al hospital, son por temas de accesibilidad, es decir, las familias viven en territorios demasiado rurales, sin vías de comunicación, sin cómo llegar, eh, o simplemente a veces no hay disponibilidad, no hay escuelas cercas, no hay, eh, hospitales cercas.

KAREN: Entonces, un poquito en cómo se hace ese análisis de por qué la condición no se logra cumplir, si es negligencia de los padres, de las familias o si verdaderamente es porque las condiciones en las que viven estas familias, eh, son demasiado adversas que no les permiten, pues, efectivamente, pues, acercarse a un centro de salud.

FRANCISCO: Sí, es muy, muy buenas las preguntas. Primero, eh, sobre la efectividad del programa. Eh, yo diría que se cumplieron parcialmente los objetivos, porque el programa solo, yo, ello no permite, eh, enfrentar todas las cuestiones de la pobreza. Mas tuve una, una contribución importante. Yo hablaba de la cuestión del hambre y en alguno tiempo después, lo primero fue en 2004, después en 2009, cuando se, se hizo una investigación sobre la cuestión de seguridad alimentaria, eh, de las familias.

Y, eh, ya se observó un progreso muy grande en términos de seguridad alimentaria de 2004 para 2009. Y investigando más, eh, sobre esto, se vio que el programa Bols Familia tuvo un pa-- un rol muy importante en este sentido, de, de garantizar sea en las ciudades, pero también en la área ru-rural, condiciones de mejor alimentación, sobre todo para los niños.

Esto-- entonces, esto fue un aspecto importante. Cuando llegamos en 2014, que se hace una otra investigación sobre seguridad alimentaria, los resultados son, eh, eh, de pos-- muy positivos, de manera que incluso la ONU, eh, reconoce a Brasil como fuera del mapa del hambre en ese momento. Y, eh, certamente el Bolsa Familia fue un instrumento, uno de los instrumentos principales para esto.

Eh, pero como decía, eh, la cuestión de pobreza, eh, es una cuestión muy, eh, involucrada con la desigualdad y no se, eh, no se logra, eh, vencer la desigualdad en un tiempo.

KAREN: De un día para otro.

FRANCISCO: De un día para otro. Eh, yo, por ex-- por ejemplo, examinaba estos datos sobre pobreza y decía: "La pobreza de ingresos ya está se resolviendo". Incluso la-- había un, un, una frase que se hablaba, que era la siguiente: "La pobreza dentro de casa se...Está mejor, eh, ya no, ya no está tan fuerte. Pero cuando se sale para las calles, la pobreza está muy fuerte porque sobre todo los servicios. Los servicios de transporte, los servicios de habitación, los servicios de salud y de educación estaban todavía, eh, necesitando de muy inve-- muy... Eh, ya no sé la palabra en español. Investimentos, muy...

KAREN: Eh, inversiones. Inversiones. Investimentos son inversiones.

FRANCISCO: Perdón. Eh, eh, inversiones. Entonces, eh, esto fue un proceso que Voz Familia tuvo una contribución parcial, pero la pobreza, eh, continuó con sus manifestaciones. Entonces, hablando un poco sobre la segunda cuestión que tú decís, yo creo que son muy, muy factores. Eh, eh... No es solamente uno, uno factor.

Yo me recordaba que el responsable por el programa en un determinado momento habló para mi lo siguiente: "Yo no voy, eh, eh, a sacar fuera una familia, eh, si no cumple las obligaciones que programa, porque nos, eh, ven-- nosotros vemos situaciones como la madre tiene que salir para trabajar y la hija más vieja se, se, se queda en casa, en su habitación con los menores".

Entonces había una situación, eh, situaciones varias en ese sentido. La distancia de las escuelas. Entonces, eh, se empezó programas de transporte escolar para, eh, se-- hacer esto mejor y, eh, también, eh otros varios, varias situaciones. Mismo la dificultad de, de, de mantener los hijos de edad mayor, eh, en la escuela por sus intereses, por su...

que esto es una cosa, la-- lo que llamamos la evasión escolar de los más viejos en la familia, buscando empleo, bus-buscando algún-- una forma de trabajo y otras situaciones. Brasil, así como México, ¿no? Eh, vive situaciones de violencia en algunas áreas y muchas veces la imposibilidad de, de ir hasta... de se-- de se lo-- de, de caminar hasta un puesto de salud o las propias escuelas. Entonces son muchos factores. Y claro, también alguna, eh, alguno, eh, no en involucramiento de los padres, ¿no? Y madres, con la importancia de la frecuencia en la escuela de sus hijos. Eso es, es un factor también.

KAREN: Ok, bueno, entonces ya las últimas dos preguntas para ir cerrando, porque el tiempo ya se nos está acabando. Entonces, eh, la primera es: usted que ha estado vin-- vinculado en organizaciones de la sociedad civil, ¿cómo ha influido la presencia social o la movilización ciudadana en la formulación o defensa de estas políticas sociales en Brasil relacionadas, pues, a la pobreza y desigualdad? Y la última es: ¿cuál considera, ¿cuáles considera que son los principales desafíos que enfrenta Brasil hoy en día para mantener o ampliar estas políticas sociales?

FRANCISCO: Sí. Primero, la, la-- el involucramiento de organizaciones de la sociedad, yo creí que fue principalmente por la vía de, de los consejos, eh, ay-- en Bra-- en un Gobierno federal, eh, eh, consejos con participación de la sociedad. Había un consejo, eh, eh, con, con mucha importancia que era el Consejo de Seguridad Alimentaria, por causa de la prioridad del presidente con la cuestión del hambre.

FRANCISCO: Ese consejo discutió, eh, toda la elaboración del programa Bols Familia y también hizo un acompañamiento, eh, permanente de eso y otros consejos también. Sí. Eh, eh, esto fue un aspecto, pero, eh, yo, eh, pienso que hay mucho desconocimiento en la sociedad brasileña sobre el programa y una cosa que, eh, tú escuchas, eh, mismo entre las personas más pobres es, eh, el pensamiento de que, eh, la transferencia de ingresos puede ser, sería una for-- una manera de las personas no trabajar y tener solamente, eh...En casi como un preconcepto contra ellos mismos. Que, eh, se van a usar la plata en bebidas alcohólicas, cosas así. Esto se escucha mucho. Eh, es importante, Karen, decir que hubo un momento político en Brasil que va de 2016

hasta muy reciente, 2022, que gobiernos de otras posiciones estuvieron, eh, en, el poder y esto creó situaciones de dificuldades para el programa, incluso con la substitución de Bolsa Familia por un programa en el gobierno Bolsonaro, que tenía muchos problemas, muchos problemas.

Entonces hubo dificultades en ese sentido. Es bien verdad también es necesario decir que durante la pandemia de, de Covid hubo una transferencia de ingresos muy signif-significativa. ¿Sí? Y yo no, no me acuerdo si respondí, había una segunda pregunta.

KAREN: Sí, la segunda, la última es: ¿cuáles cree que son los principales desafíos que enfrenta Brasil hoy en día para mantener, ampliar o mejorar esas políticas sociales? Mmm.

FRANCISCO: El pro- problema del presupuesto. Eh, eh, eh, es necesario... Primero, en mi punto de vista, una corrección del valor que es transferido para las familias. Esto tiene un peso grande en el presupuesto. El presupuesto brasileño actualmente es, eh, sufre una grande disputa.

Disputa incluso entre los poderes, el poder ejecutivo y el poder legislativo. Y, eh, el, el presupuesto para las necesidades del país es muy insuficiente. El discurso de lo... del ajuste fiscal es, es muy fuerte en Brasil actualmente. Eh, eh, en ese, yo creo que esta es la principal dificultad para el programa.

Nuestros otros tuvimos, para terminar, tuvimos una situación fuerte de inflación de alimentos y con muchas dificultades para la población más pobre. Y, eh, se-sendría deseable haber una corrección de valor transferido de bolsa-mil, pero el gobierno no logró hacer esto por causa de la oposición, eh, de utilización, eh, del recurso, del presupuesto para eso.

KAREN: O sea, el, el presupuesto designado es muy poco. Tendría que hacerse un aumento-

FRANCISCO: Sí. Para el enfrentamiento de la pobreza. De manera general.

KAREN: Okey, okey, listo. Eh, bueno, pues agradecerte mucho, Francisco. No sé si quieras comentarme algo más o, pues ya podemos ir cerrando.

FRANCISCO: No. Mira, lo que más, eh, tuvieras necesidad de aclarar, yo-- podemos cambiar en, eh, WhatsApp cosas.

KAREN: Ah, okey, bueno. Bueno, pues muchas gracias. Sí, de pronto, eh, si no te molesta, yo te puedo mandar como algunas conclusiones cuando termine de escribir y, pues con las teorías que estoy utilizando, toda la literatura, digamos, teórica que está detrás de, eh, pues digamos del desarrollo humano y demás. Y pues entonces, si me lo permites, yo te envío unas conclusiones sobre los, eh, digamos, sobre los principales encuentros que tenga y, bueno, me encantaría poder recibir tu opinión.

FRANCISCO: Muy bien. Certamente.

KAREN: Bueno, entonces muchísimas gracias y que bueno, que disfrutes la tarde con tus nietos.

FRANCISCO: Sí, van a llegar de la escuela.

KAREN: Ah, bueno, bueno. Entonces, que tengas buena tarde. Y entonces, pues ahí estamos en contacto.

FRANCISCO: Sí, sí, perfecto.

KAREN: Chao, gracias.

FRANCISCO Chao, chao.