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Cash transfer programmes, poverty reduction and women's economic empowerment: Experience from Mexico

Mónica E. Orozco Corona and Sarah Gammage



Gender,
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**Gender, Equality and Diversity Branch,
Conditions of Work and Equality Department**

Social Protection Department

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Abbreviations

BGA	Basic Geo-statistical Areas
CCT	Conditional Cash Transfer
CADI	Centros de Atención para el Desarrollo Infantil (Centres For Child Development)
CAIC	Centros de Atención Infantil Comunitaria (Community Child-Care Centres)
CENDIS	Centros de Desarrollo Infantil (Centres For Child Development)
CEPAL	Comisión Económica para América Latina y el Caribe (= ECLAC)
CIDE	Centro de Investigación y Docencia Económicas (Centre for Research and Teaching in Economics)
CIESAS	Centro de Investigaciones y Estudios Superiores en Antropología Social (Centre for Research and Higher Studies in Social Anthropology)
CONSEVAL	Consejo Nacional de Evaluación de la Política de Desarrollo Social (National Council for Evaluation of Social Policy)
COPLAMAR	Plan Nacional de Zonas Deprimidas y Grupos Marginados (National Coordination for Depressed Zones)
DIF	Desarrollo Integral de la Familia (System for the Integral Development of the Family)
ECLAC	Economic Commission for Latin America and the Caribbean (= CEPAL)
ENCASEH	Encuesta de Características Socioeconómicas de los Hogares (Survey of Household Socio-economic Characteristics)
ENCEL	Evaluación de los Hogares (Household Survey, Oportunidades evaluation data)
ENIGH	Encuesta Nacional de Ingresos y Gastos de los Hogares (Household Income and Expenditure Survey)
ENOE	Encuesta Nacional de Ocupación y Empleo (National Occupation and Employment Survey)
ENSANUT	Encuesta Nacional de Nutrición (National Nutrition Survey)
ENUT	Encuesta Nacional sobre Uso del Tiempo (National Time Use Survey)
GDP	Gross Domestic Product
IDB	Inter-American Development Bank
IFPRI	International Food Policy Research Institute
IMSS	Instituto Mexicano del Seguro Social (Mexican Institute of Social Security)
INEGI	Instituto Nacional de Estadística y Geografía (National Institute of Statistics and Geography)

INMUJERES	Instituto Nacional de las Mujeres (National Women's Institute)
ISSSTE	Instituto de Seguridad y Servicios Sociales de los Trabajadores del Estado (Institute of Social Security Social Services for State Workers)
IUD	Intrauterine device
MXN	Mexican Peso
Oportunidades	Programa de Desarrollo Humano Oportunidades
PAL	Programa de Apoyo Alimentario (Food Support Programme)
PET	Programa de Empleo Temporal (Temporary Employment Programme)
PNUD	Programma de las Naciones Unidas para el Desarrollo (= UNDP)
PROCAMPO	Agricultural subsidies
Progresá	Programa de Educación, Salud y Alimentación
PRONASOL	Programa Nacional de Solidaridad (National Solidarity Programme)
Prospera	Prospera, Programa de Inclusión Social
SAC	Sistema de Atención Ciudadana (Citizen Attention System)
SCT	Secretaría de Comunicaciones y Transportes (Ministry of Communications and Transportation)
SEDESOL	Secretaría de Desarrollo Social (Ministry of Social Development)
SEMARNAT	Secretaría de Medio Ambiente y Recursos Naturales (Ministry of Environment and Natural Resources)
SEP	Secretaría de Educación Pública (Ministry of Education)
SSA	Secretaría de Salud (Ministry of Health)
UNDP	United Nations Development Programme
UNIFEM	United Nations Development Fund for Women



Preface

Social protection is important in advancing gender equality and women's empowerment; social protection floors, in particular, can play a key role in closing coverage gaps for women. Aiming at preventing or alleviating poverty, vulnerability and social exclusion, social protection floors as part of broader social protection systems, are central to economic and social development. The United Nations 2030 Sustainable Development Agenda, through target 5.4 of Goal 5 "Achieve gender equality and empower all women and girls", emphasizes the role that social protection policies play in recognizing and valuing unpaid care and household work and therefore in attaining Goal 5, in addition to attaining other Goals.¹ A gender-responsive approach to social protection, which promotes gender equality and addresses women's specific needs, including maternity protection and measures to recognize, reduce and redistribute unpaid care and household work, is thus crucial.

The Social Protection Floors Recommendation (No. 202), adopted in 2012, provides guidance to the ILO's 187 member States on establishing and maintaining social protection floors as a fundamental element of their national social security systems. The Recommendation recognizes social security as an important tool to promote equal opportunity and gender equality. Specifically, it lists "non-discrimination and gender equality" among the principles that ILO member States should apply in giving effect to this instrument. Then, the Recommendation calls for at least an essential level of health care (including maternity care) and income security (including in case of maternity and for children) to be provided to all residents as part of the basic social security guarantees that constitute national social protection floors. Such nationally defined social protection floors can play a key role in enabling and empowering women and reducing gender inequalities.

Cash transfer programmes have been implemented in many countries as a key component of their national social protection floors. As these programmes provide a modest but regular income to poor households, they have the potential to reduce poverty and to enhance women's economic empowerment. As the World Social Protection Report 2014–15 noted, social protection is a crucial instrument in addressing all forms of poverty. Cash transfer schemes have successfully reduced poverty in Africa, Asia and Latin America, potentially delivering much faster results than those expected from the "trickle-down" effects of economic policies. Although in practice benefits have tended to be lower than needed, a cash transfer at an adequate level can bring people out of poverty overnight.

In order to analyse cash transfer policies and identify potential challenges and opportunities, the ILO undertook a comparative analysis of large cash transfer programmes that are well known in development circles, namely in Brazil, Chile, India, Mexico and South Africa. These country studies consider not only the immediate impact of these programmes on poverty reduction, but also seek to identify evidence on their longer-term effects and wider implications for various dimensions of women's empowerment, such as providing women

¹ In particular, Goal 1 "End poverty in all its forms everywhere"; Goal 3 "Ensure healthy lives and promote well-being for all at all ages"; Goal 8 "Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all"; and Goal 10 "Reduce inequality within and among countries".

with skills to enable them to enter quality jobs and improve income generation. Other important aspects impacting on women's empowerment that are examined include improving the recognition, reduction and redistribution of unpaid care. The risk of reinforcing traditional gender roles is also examined.

This work on cash transfers aims to generate new thinking on ways to improve the impact of cash transfer programmes on women's poverty alleviation and economic empowerment. It contributes to ILO's commitment to creating and extending social protection floors as reflected in the ILO 2016–17 Programme and Budget and promoting more and better jobs for inclusive growth, as well as the transition from the informal to the formal economy, and protecting workers from unacceptable forms of work. It also sets out good practices that can provide further guidance on gender-responsive social protection. The country studies are based on a review of the relevant literature on cash transfer programmes, including impact assessments, evaluations and other studies, as well as national policy documents. In addition, relevant data and statistics have been extracted from labour market and employment databases, social security statistics, time use statistics and other sources.

This working paper on cash transfer in Mexico reviews over 150 publications on cash transfer programmes in the country since the end of the 1990s and presents the impact of these on health, education, income, poverty, labour force participation, time use and bargaining power of women at the household and community level. Moreover, the study focuses on the effects of the programme on women and girls, and how it impacts their lives. Its results point to evidence that most of these gender-related interventions have focused on breaking the inter-generational cycle of poverty, particularly for disadvantaged girl children, but have been weaker in promoting women's economic empowerment through employment or sustainable livelihoods. They also highlight the challenge of enhancing women's economic empowerment with targeted actions aimed at reducing women's time poverty and redistributing unpaid care responsibilities between women and men and between families and the State. More employment-related services in combination with child-care and other social services, either as part of the programme or articulating it with other initiatives, such as the child-care programme *Estancias Infantiles* (Child-care Centres), hold potential to multiply the positive effects of the programme and increase women's labour force participation.

The results of this study have informed the comparative study, authored by Elaine Fultz and John Francis, and published in this series under the title of "Cash transfer programmes, poverty reduction and empowerment of women: A comparative analysis – Experiences from Brazil, Chile, India, Mexico and South Africa".

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1. Introduction

“Freedoms are not only the primary ends of development, they are also among its principal means.”

Amartya Sen (2000)

This report explores how cash transfer programmes have the potential to empower women by examining the particular example of the programme Progres-Oportunidades-Prospera¹ in Mexico. Empowerment is taken broadly to mean fostering greater agency and ability to secure one’s own well-being and that of one’s family. Applying Amartya Sen’s (2000) framework, the foundation of poverty analysis should be the “substantive freedom” or “capabilities” that enable an individual to choose a life that she or he values.

We review over 150 articles, evaluations, and policy analyses of the Progres-Oportunidades-Prospera programme to explore the potential and actual empowerment outcomes for women through the programme. In particular we concentrate on economic empowerment outcomes in terms of greater control over household resources and a greater ability to participate in labour market.² The conclusions from this analysis highlight that *Prospera*, like most of the conditional cash transfers (CCT) programmes in the region, tends to apply an instrumental view of women which largely reinforces existing gender roles in the delivery of the transfer and the requirements for co-responsibilities. It does, however, have the potential to empower women particularly through some of the supplementary activities that it fosters – engendering more cooperative community engagement and building individual and collective social capital (Adato, 2000, 2006; Escobar Latapí and González de la Rocha, 2004; Molyneux, 2009; Adato and Roopnaraine, 2010a, 2010b). Moreover, there is evidence that transiting from extreme poverty through poverty to non-poverty provides women with household resources that change their perceived status in the community and increase their self-esteem (Escobar Latapí and González de la Rocha, 2004). Additionally, the process of requiring health-care and nutrition co-responsibilities, in a context where the State has increased the supply of these services, may lead to greater consciousness and expectations about the quality of services rendered (Barber and Gertler, 2008), as it provides evidence of a greater control over non-financial resources and improved agency. The employment effects for adult women in beneficiary households are largely ambiguous, although there is evidence that children graduating from school with more human capital secure better employment as young adults and experience greater occupational mobility. Moreover, time use patterns for women may change adversely as a result of the redistribution of household tasks (Palermo and Braymen, 2010). Integrating a more rigorous analysis of time use and time poverty into the programme evaluation criteria may temper these findings and facilitate the design of targeted interventions to reduce time poverty and redistribute time use in household and market tasks more equally between men and women. The conclusions from this analysis, however, underscore that the economic empowerment outcomes could be magnified by better linking the programme to child-care services and, even more, to labour market intermediation and training services (above all in urban areas), as part of a systematic approach to graduation from the programme. Moreover, important programmatic

¹ The programme has changed names over time, from Progres (initiated in 1997) over Oportunidades (2001) to Prospera (2014); see Chapter 2 for more details.

² See Golla et al. (2011) and Kabeer (1999) for definitions and analysis of various dimensions of women’s economic empowerment.

synergies for households and for women could be achieved were it to be better linked and coordinated with other state programmes operating in many of the localities.

By 2014, *Prospera* did not include an explicit component for women's economic empowerment, but focused on breaking the inter-generational cycle of poverty through the development of human capabilities – improving education, nutrition and health outcomes for individuals in poor households, and contributing to enhancing financial and labour inclusion. Where a gender focus existed, it was expressed through special attention (affirmative action) to reducing gender disparities in the three original areas of intervention: education, nutrition and health. There is, however, an underlying assumption occasionally manifest in evaluations and analyses of the programme that strengthened capabilities will themselves help to improve some dimensions of gender empowerment, particularly with respect to these three components. Starting mid-2014, *Prospera* incorporates new strategic lines related to social, financial, employment and productive inclusion, which nowadays integrate a fourth component of *Prospera*, the *binding component*.³ This component is intended to facilitate the access of the beneficiaries of the programme to other federal government programmes in Mexico which are explicitly designed to enhance access to financial services, employment and productive initiatives.⁴

Women are at the centre of the programme, either as beneficiaries or as members of the programme's operations committees – a feature which has the potential to challenge aspects of traditional gender roles. The pivotal role of women in the programme has been analysed from different perspectives to explore the potential effects on women's attitudes and changing behaviours as beneficiaries and actors within the programme. Exploring potential changes in agency, and their link to programme participation, has been a focus of researchers and policy-makers, either with the aim of promoting greater gender equality or to alert programme operators to the risks of reinforcing traditional gender roles and failing to expand women's social and economic empowerment opportunities (Adato, 2000; Adato et al., 2000; Escobar Latapi and González de la Rocha, 2000; González de la Rocha, 2008, Molyneux, 2006).

Various authors underscore that CCT programmes do not focus explicitly on women's empowerment and view women fundamentally as instrumental to the programme goals. Adato and Roopnaraine (2010b) for example highlight that CCT programmes are not primarily concerned with women's empowerment as such, where empowerment is defined by Kabeer (1999) and Sen (2000) and emphasizes individual agency and personal freedoms. Adato and Roopnaraine (2010b) contend that these programmes are concerned with how women facilitate the main objectives of the programmes, since they are central to the implementation strategies. These authors consider that maybe the "greatest empowerment they offer is to girls, for their futures" (ibid: 286).

Furthermore, as Golla et al. (2011: 5) observe, "No single programme can address all of the factors that contribute to women's economic empowerment. Rather, if economic empowerment is seen as a complex, multi-layered pie, programmes should choose their slice".

³ *Prospera's* Rules of Operation in 2015.

⁴ CONEVAL (2016:32) refers to the Ministry of Social Development's (SEDESOL) efforts working together with *Prospera* and the Ministry of Agriculture (SAGARPA), Ministry of Economics, Ministry of Labour, Ministry of Finance, the International Network for Research in Production Systems (RIMISP), United Nations Organization (UN) and the World Food Programme (WFP) to develop a pilot study on "Productive territories" to obtain evidences to improve programmes oriented to enhance the income of small producers.



Nevertheless, evaluations of the programme show impacts in many indicators that can result, as part of a gradual process, in empowering women in very specific dimensions over the medium and longer term. Some of these evaluations highlight how the application of a more consistent gender approach can facilitate empowerment outcomes for women and girls, while others derive conclusions by separating outcomes by sex using indicators that highlight continuing gender gaps. Following Golla et al. (2011), critical dimensions to consider when evaluating *Oportunidades/Prospera* in terms of its ability to foster women's economic empowerment include: human capital (e.g. education, skills, training), financial capital (e.g. loans, savings), social capital (e.g. networks, mentors) and physical capital (e.g. land, machinery).

As a part of the strategy for monitoring and evaluation of the binding component of *Prospera*, Rubalcava (2015) also suggests including women's empowerment related to microcredit. However, while he is interested in business initiatives from women, he puts an emphasis on women's "empowerment" measured as intra household increases in decision making in traditional gender roles, such as regarding children's health and education (Rubalcava 2015: 70, 98).

Although some improvements are readily observable and easily documented, empowerment necessarily embodies the domains of choice, agency and roles transformation, as defined by Kabeer (1999) in her seminal work on women's empowerment. Impacts may also be considered in terms of their ability to reduce existing and future social and gender inequalities, for example the contribution to reducing educational gender gaps at the national level. However, it must be kept in mind that, for every indicator chosen, the reduction or elimination of national gaps does not mean that these results are invariant to territorial aspects: spatial variation does exist and reducing this variation and inequality must be a permanent focus of policy interventions. As the programme itself acknowledges in various documents, a single intervention is insufficient to expand development opportunities for everybody in every place, consequently, coordination among social policies and interventions is a *prerequisite* for reducing structural exclusions that affect well-being.

Gender empowerment outcomes in the programme, however, can be fostered through affirmative action in the delivery of services and in the design of co-responsibilities, particularly where these activities and services are crafted to satisfy women's health-care needs and enhance their knowledge for personal well-being,⁵ and also with the intention of fostering improvements in women's status in their families and communities by delivering cash transfers directly to them. Efforts to magnify these outcomes could prove particularly useful if we are to support gender empowerment through their operation.

This report briefly summarizes the characteristics of the Mexican programme and those impacts that have been evaluated that can be associated, either directly or indirectly, with women's empowerment. There is a specific focus on the documented effects on indicators of economic empowerment – either as factors related to labour force participation and income generation, or as positive spill-over effects of the programme such as improved credit-worthiness, savings or property entitlement and acquisition. But we also consider other dimensions of empowerment achieved through improvements in health, education, time use, bargaining power and collective action. We review more than 50 evaluations of *Progresa/Oportunidades/Prospera* and identify key dimensions of potential economic empowerment for women that may be associated with programme interventions.

⁵ Some interesting work is being conducted on subjective well-being among direct beneficiaries. See work by Palomar-Lever and Victorio-Estrada (2014).



2. *Oportunidades/Prospera*: Design and implementation

Prospera is the largest cash transfer programme in Mexico. Inaugurated in rural and semi-urban areas in 1997 as *Progresa*, the programme was renamed as *Oportunidades* in 2001. In 2002 *Oportunidades* expanded, increasing the range of benefits included and beginning operation in urban areas. Subsequently, in 2014, its name changed to *Prospera* (SEDESOL, 2014). Despite these changes, it has largely preserved its original design and eligibility criteria. Specific features distinguish *Progresal/Oportunidades/Prospera* from earlier public policy interventions to reduce poverty in ways that constitute a paradigmatic shift in government action, namely:

1. The programme seeks to integrate three basic components of human capital development with the explicit goal of reducing current and future poverty: education, health and nutrition. And recently, a binding component intended to promote social, financial, employment and productive inclusion (SEDESOL, 2015).
2. Eligibility is conditional on beneficiaries' compliance with co-responsibilities that were formulated to strengthen human capital acquisition.
3. Benefits are differentiated according to the demographic composition of households.
4. In an effort to increase women's control of household resources, in virtually all cases (98 per cent), cash transfers are paid directly to them as representatives of their households.
5. Cash transfers are generally made every two months directly to women via the public telecommunications agency. In-kind benefits are also provided via public health and education services.
6. In order to avoid incentives to increase fertility or reduce labour force participation, cash transfers are subject to a family ceiling.
7. Targeting is through a proxy means test designed to ensure the inclusion of poor households based on observable characteristics (housing, household assets, pregnancy, etc.). The formula is multidimensional and makes use of a statistical model that is intended to reduce clientelism and avoid political manipulation.
8. The design of the programme is based on a diagnostic that reflects both the causes and consequences of poverty.
9. Programme operation is continuously monitored, and records of beneficiary data, individual compliance with co-responsibilities, and delivery of cash and in-kind benefits are compiled.
10. Impact evaluation has been in place since the programme's inception. Relying on national and international experts, these evaluations provide policy-makers with information to guide decision-making.

Along with the change of name in 2014, some new design features were added to the programme. Among the principal ones, financial incentives for young recipients to enroll in undergraduate or technical courses; a larger repertoire of basic medical interventions; legal channels to dispute the cancelation of benefits; an agreement with the National

Employment Service to facilitate the transition from school into employment; and collaboration mechanisms with financial agencies to encourage financial inclusion.¹ Since 2012, the programme absorbed the Food Support Programme (Programa de Apoyo Alimentario, PAL), which provides unconditional cash transfers of the same level to families that, due to a lack of nearby schools and hospitals, are not able to meet the regular *Prospera* requirements. All these changes are part of *The National Crusade Against Hunger*, an umbrella programme intended to channel and coordinate all the poverty related policies launched by Mexican government at the outset of the current administration in 2013.

2.1 Design

The initial design of the programme is well documented in the government publication *Programa de Educación, Salud y Alimentación (Progresá, 1997)*. It describes the fundamental objective of *Progresá/Oportunidades* as promoting the development of human capital in the form of health and education. This is expected to break the inter-generational cycle of poverty where malnutrition, poor health and early school drop-out lead to an adulthood characterized by high fertility, low-quality employment, low income, and high dependency ratios within households. Although the central goal of the programme is to reverse the cycle of poverty by improving human capabilities from childhood, specific components also target poverty prevalent among adults. Altogether, the interventions are intended to mitigate both the causes and consequences of poverty.

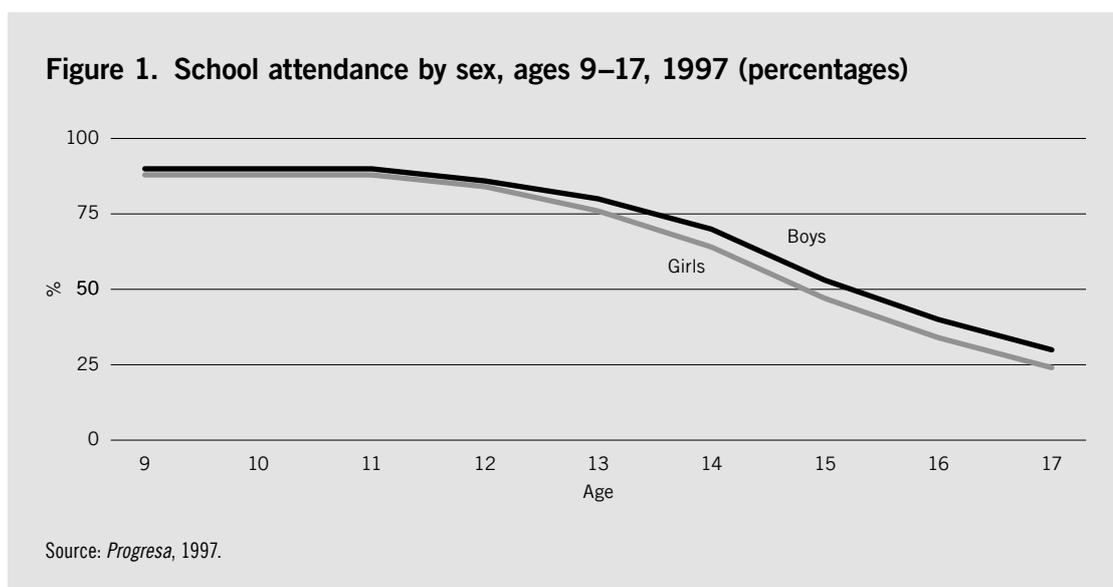
The original design and continuing modification of the programme rely heavily on national statistics to corroborate targeting and outcomes. In addition, *Prospera* identifies characteristics that distinguish poor from non-poor individuals. Results from *Progresá* (1997) revealed important disparities between the poor and non-poor in several dimensions:

- a) Monthly income per poor worker was on average 23 per cent less than for non-poor counterparts.
- b) Economic dependency ratios averaged 3.3 among poor households, compared to 2.1 among non-poor households.
- c) Average per capita income in poor households was just slightly more than one-third that of the non-poor.
- d) School attendance dropped much more sharply among the poor, starting at age 12.

The 1997 *Progresá* document highlights several issues of specific importance for women. It notes that domestic work and child-care limit women's ability to develop activities outside the home, as well as their ability to secure well-paid employment. It recognized that, in addition to impeding early childhood development, high fertility and food insecurity also took a heavy toll on women's general health. Comparing women and men, it noted that:

- a) The mean income from work for female heads of household was lower than for men in both rural poor and non-poor settings.
- b) More than 60 per cent of female household heads in rural, poor, highly marginalized areas had never attended school, whereas only 24 per cent of their male counterparts had never done so.

¹ This can be a dimension that should be easily reinforced through the transfer mechanisms. See work by Masino and Niño-Zarazúa (2014).



- c) A gender gap in secondary school attendance (children aged 12 and more) was typical in resource-poor households (see figure 1).
- d) In rural areas 72 per cent of women reported that they did not wish to get pregnant; however, 35.8 per cent of them were not using a family planning method, demonstrating a significant unmet need for family planning and reproductive health services

To address these disparities, *Progesa/Oportunidades/Prospera* includes specific interventions aimed at improving education, health and nutrition (see table 1):

- Within the education component, the programme provides school supplies as well as scholarships for primary, junior high school, high school and, since 2015, undergraduate students. The scholarships increase in value with grade and educational level to provide an incentive to remain in school. In an effort to reduce the extraordinary drop-out rates at the junior high school level, the programme also provides a savings account for students who complete high school by age 22.
- Within the health component, all household members have access to a basic health package. Workshops and talks for individual household representatives are provided to improve health literacy and knowledge. Health sessions are also organized for youth attending high school.
- The nutrition component provides cash supports along with nutritional supplements and subsidized milk.
- As a programme add-on, cash support is also provided for the elderly within participating households (*65 y Más*) and for vulnerable families that are not able to meet the *Prospera* requirements due to a lack of accessible schools and health services (PAL).

In each of the three components, operational rules stipulate affirmative action that targets women. To redress gender disparities in school attendance and completion, the education component provides more generous scholarships for female students. The basic health package includes sexual and reproductive health services; tests and medications for cervical and breast cancer; family planning, pregnancy, delivery and postnatal care. Specific nutritional supplements are provided for pregnant and lactating women.

Table 1. Oportunidades/Prospera components and gender-affirmative action

Component	Benefit	Gender-affirmative action/ Gender sensitivity
Education	Scholarships School supplies	Higher scholarships for girls Cash transfers delivered to women responsible for the household
	Saving fund ¹	
Health	Preventive health package	Sexual and reproductive health services
	Educational talks (<i>pláticas</i>) ²	Pregnancy, delivery and post-partum
Nutrition	Monetary support	Cash transfers delivered to women responsible for the household
	Supplements	Specific nutrition supplements for pregnant and lactating women
Other	Old age non-contributory pension ³	Disproportionately to women because of the demographics of ageing

Notes: ¹ Cash transfer delivered to the individual youth. ² Must be attended by a member of the household. In addition, each high school beneficiary must attend as co-responsibility. ³ Cash transfer delivered to the elderly person.

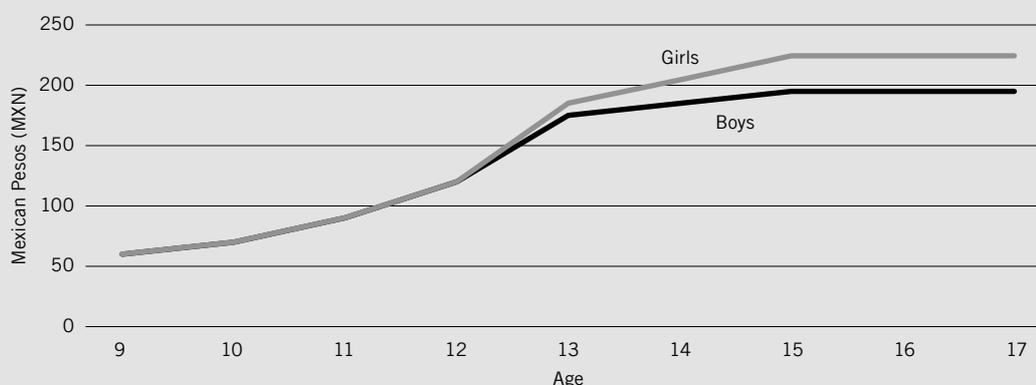
All cash transfers are delivered to those women responsible for household management and child-care. This feature of the programme is based on the recognition that in Mexico household work and caring are overwhelmingly undertaken by women. There is evidence that the receipt of cash transfers can empower women in many ways, as will be discussed in this report. However, the programme does not explicitly challenge this prevailing social division of gender roles (see Cruz, de la Torre and Velázquez, 2006) and tends to see women in a largely instrumental fashion (Molyneux, 2006).

Co-responsibility in the education component consists of school registration and a monthly certification of attendance for each child. The family receives support for each registered student only if the student is present for at least 80 per cent of school days each month. The scholarships are provided on an individual, rather than a family basis. This is intended to avoid the intra-household discrimination that prevailed before the initiation of the programme, when young girls had more limited access to education than their male siblings (see figure 2).

The health component includes health promotion and preventive measures, as well as early screening for diseases with major public health implications. It consists of a basic, free package of services and medications, provided through scheduled appointments for various interventions by age group, sex and life event. For the household to receive the cash support for food, each household member must attend the scheduled appointments. In these scheduled appointments, pregnant women, nursing mothers and children under age 5 who are malnourished receive food supplements. There is a special emphasis on surveillance of children's nutrition.



Figure 2. Scholarship amounts, by sex, ages 9–17, 1997, in Mexican Pesos (MXN)



Source: *Progres*a, 1997.

In the same component, educational presentations and workshops are provided to promote health literacy among the adults in the household. One adult per household is required to attend. Originally this was the woman receiving the cash transfer, although *Progres*a (1997) clearly expressed that both fathers and mothers should be encouraged to attend. This expectation was explicitly emphasized in the Rules of Operation in 2005 in response to criticism of the heavy time burden that this requirement placed on women. However, reflecting the continuing gender division of household tasks among *Oportunidades/Prospera* families, it is typically the woman who attends these sessions. A specific analysis of the co-responsibility data would be required to determine how much this may have changed over time.

In addition, high school beneficiaries are also charged with the co-responsibility of attending educational workshops at school. These workshops, where students receive training in personal care, are provided by public health services. There are ten workshops per year, with the topics identified and presentations delivered by public health sector workers.

The cash transfers for nutrition are fixed for each household based on family size and adjusted twice a year by the national consumer price index. The transfer includes a supplemental amount for each child under age 9.

Support for the elderly was not one of the initial objectives of *Oportunidades/Prospera*, nor can a clear rationale be found in subsequent official documents for its inclusion. Rather, for purely operational reasons, the government used *Oportunidades* as a vehicle for the subsequent delivery of benefits to the elderly. Given the size and coverage of the programme, this piggybacking facilitates reaching a large segment of the elderly population. However, in 2007 a new non-contributory pension programme, *70 y Más*, was created in parallel to benefit elderly over the age of 70, so that benefits could be provided to a broader community of beneficiaries beyond *Oportunidades*. The programme was expanded in 2012 to include those between 65 and 70 years-old; it was renamed *65 y Más*. Unfortunately some elderly people in isolated areas can only be reached through the *Prospera* programme; as a result, it continues to be an important vehicle for the delivery of benefits to the elderly. The fusion with the PAL in 2013 followed a similar operational and economic logic. Table 2 summarizes the cash benefits available through *Prospera*.

Table 2. Cash transfer amounts, per month, Jan–June 2016

Component	Cash transfer (in MXN)¹		
Nutrition	335 (US\$ 17.91)		
Nutrition <i>Sin Hambre</i>	88 (US\$ 4.71)		
Nutrition complement	140 (US\$ 7.49)		
Child 0–9	120 (US\$ 6.42)		
Elderly	370 (US\$ 19.79)		
Primary grade 1	175 ² (US\$ 9.36)		
Primary grade 2	175 ² (US\$ 9.36)		
Primary grade 3	175 (US\$ 9.36)		
Primary grade 4	205 (US\$ 10.96)		
Primary grade 5	265 (US\$ 14.17)		
Primary grade 6	350 (US\$ 18.72)		
	Male	Female	Gender affirmative action as %
Junior High 1	515 (US\$ 27.54)	540 (US\$ 28.88)	6
Junior High 2	540 (US\$ 28.88)	600 (US\$ 32.09)	11
Junior High 3	570 (US\$ 30.48)	660 (US\$ 35.29)	16
High School 1	865 (US\$ 46.26)	990 (US\$ 52.94)	15
High School 2	925 (US\$ 49.46)	1 055 (US\$ 56.42)	14
High School 3	980 (US\$ 52.41)	1 120 (US\$ 59.89)	14
College	750 (US\$ 40.11)		
College transportation	200 (US\$ 10.69)		
Maximum total amount per household per month: 2,945 (US\$ 157.49)			

Notes: ¹ Average real exchange rate in 2016: 1 US\$ = MXN 18.7 (Mexican Pesos). ² Only in localities with fewer than 2,500 residents.

Source: SEDESOL, 2016.

2.2 Implementation

Oportunidades/Prospera is operated by a governmental unit referred to as the “National Coordination” located within the Ministry of Social Development. It also has an advisory council whose members represent the Secretariats of Ministries involved in its operation. The council has a technical committee which provides guidance and technical support for policy decisions concerning the design and operation of the programme. *Prospera* is a federal programme that receives resources from the Ministry of Social Development, the Ministry of Education, and the Ministry of Health (see Gómez Hermosillo, 2011, and *Oportunidades/Prospera*, 2013, for budget trends). Since 2001, it has also been receiving resources in the form of loans from the Inter-American Development Bank (IDB).

States and municipalities participate in the programme in an operational capacity only, by providing health and education services and convening beneficiaries to gather their cash transfers in dates appointed by the National Coordination; they have no role in programme design or financing, or in selection of beneficiaries. This helps the programme to avoid political capture and clientelism at the local level. Since its inception, one of the distinctive operational features of *Oportunidades/Prospera* has been its reliance on existing institutions and administrative systems without allowing programme objectives and targeting to be affected by local political cycles. This has avoided duplication, made more efficient use of available resources, and increased transparency while helping to expand the supply of health and educational services – particularly in rural areas.

As of 2016, *Prospera*'s total budget was around US\$ 4.3 billion (MXN \$82.19 trillion).² As noted earlier, the funds are included in the budgets of Ministries in the social development, education and health sectors and managed by the National Coordination. Its operational cost represents only 1.73 per cent of the total budget.³ Programme regulations commit those resources exclusively for *Prospera* benefits. Currently, *Prospera* reaches close to 6.8 million households – including PAL recipients –,⁴ representing around 25 per cent of the Mexican population. Territorial coverage includes all states and municipalities in approximately 115,500 localities. Among Mexican government programmes, *Prospera* has the largest number of direct beneficiaries and the most innovative and transparent operational mechanisms. This helps to explain why, over time, the programme has added new elements to its basic components: savings accounts for students (2003), transfers for the elderly (2006) and the PAL (2013), as well as funds for purchasing household energy

² *Decreto de presupuesto de egresos de la Federación para el ejercicio fiscal 2016* and its annexes for sectors 17 and 18 http://www.diputados.gob.mx/LeyesBiblio/pdf/PEF_2016.pdf. Public social expenditure increased from 38 per cent of total public expenditure in 1990 to a little over 56 per cent in 2010 (see Ordoñez, 2010 and CEPALSTAT). This represented an increase in almost 5 percentage points of GDP devoted to social expenditures over the same period. *Oportunidades* represented an expenditure of a little less than 0.5 per cent of GDP in 2009 (Fiszbein and Schady, 2009).

³ *Idem*. The budget for 2016 was \$MXN 4,763,874,000,000.00. Authors' calculation with information of the Ministry of Finance on the *Decreto de presupuesto de ingresos de la Federación para el ejercicio fiscal 2013* and its annexes for sectors 11, 12 and 20. The observatory of federal public expenditure, *Transparencia Presupuestaria*, reports 2.02 per cent, considering only the expenses to pay for services to deliver money (available on-line at: <http://www.transparenciapresupuestaria.gob.mx/Portal/transform.nodo?id=4.0&transformacion=s&excel=n&zip=n¶mts=0=L511598>). Our estimate considers also the cost of the National Coordination. It is common to see in the literature estimates of around 5 per cent (see for example Fiszbein *et. al*, 2009), but those estimates are relative only to the SEDESOL's budget, not including the budget from the Ministry of Education and the Ministry of Health for the programme.

⁴ PROSPERA, Programa de Inclusión Social. “Cobertura de Atención”, available at: https://www.prospera.gob.mx/swb/es/PROSPERA2015/Cobertura_de_atencion. It includes 670,000 beneficiaries in isolated localities with no services, in a special scheme titled *Programa de Apoyo Alimentario* (PAL) from 2010.

(2007), and increases in the direct transfer (2008). Thus, in addition to serving as a vehicle of human development, *Prospera* now provides considerable support for consumption in poor households. As such, it has also been able to act as an income-smoothing mechanism over the course of the 2007/2008 financial crisis and more recent economic downturn associated with the peso devaluation.⁵

The huge scale of *Prospera's* operation requires coordination among Ministries at the federal and state levels. In particular, the conditional nature of cash payments requires registration of beneficiaries in more than 10,000 health units and about 100,000 schools. In addition, *Prospera's* large scale has been useful to policy-makers and stakeholders in promoting changes that reach vast segments of the population. Its reach far exceeds that of small, local and low-budget programmes (for example, employment programmes).

A distinctive characteristic of the programme is that its operation at the community level is aided by beneficiary women, *vocales* (or *promotoras* in the early stages of the programme), elected by a group of beneficiaries in each community. The *vocales* help other women in their communities to understand and comply with programme requirements, provide them with information and promote solutions when problems arise with the provision of services or delivery of transfers (Scaife Díaz, 2012). The number of *vocales* in every community (or group of small communities) depends on the size of the community; each one of them is in charge of a thematic area of the programme: education, health, nutrition and surveillance. There are 75,000 committees and about 300,000 *vocales*. Many social programmes rely on committees of beneficiaries, but are predominantly driven by men. Evaluations of social programmes rarely focus on these committees, but in *Oportunidades* and *Prospera*, women's participation in operations have introduced some additional social changes that go beyond the direct programme benefits and have the potential to contribute to women's empowerment. These will be summarized in section 4 of this document, on impacts and results.

From its inception, the programme had a social audit system (*Progresa*, 1997) which was intended to promote transparency and avoid manipulation. The committees of *vocales* play an important role in this oversight mechanism. As part of this system, the programme also includes a survey to monitor operations every six months (*puntos centinela*). Hevia and Gruenberg (2010) point out that this system (*Sistema de Atención Ciudadana, SAC*) demonstrates a process of consolidation over time with attention to: 1) creating public value; 2) vesting local authority and political legitimacy; and 3) building operational capacity. As a part of their analysis they suggested the programme also include a gender dimension as a way to better identify and mitigate asymmetries of power and any incidence of gender violence in the operations. Increasingly, other social programmes have their own systems to verify operations, a good practice which has been adopted based upon the success of the audit system developed through *Progresa/Oportunidades*.

⁵ For a discussion on to what extent *Oportunidades* prevented increases in poverty incidence, see CONEVAL 2011, 2012 and 2013, and the end of section 3 in this document. During the period of the crises the programme increased its budget by 23.9 per cent and PAL increased 678.5 per cent as a countercyclical strategy. Public transfers (*Oportunidades* included) prevented an increase of 1.7 million people in extreme poverty from 2008 to 2010 and 1.5 million in poverty (CONEVAL, 2012, 2013).

2.2.1 Entering the programme: Targeting mechanism

Prospera has a strictly defined method for targeting beneficiaries. The method was designed to make household identification more transparent, to avoid political manipulation, and to prevent exploitation of benefits by non-poor households (Orozco Corona, Gómez de León, Hernández, 1999; Orozco Corona and Hubert, 2005; Hernández Franco, Orozco Corona and Vázquez Báez, 2008; SEDESOL, 2013; Kidd et al., 2017). This method facilitates the programme's large-scale and standardized operation, since every household in any part of the country, once its data have been recorded by an entry survey, is evaluated according to explicit standards and thus has a known probability of inclusion in the programme.

The targeting proceeds successively on two levels: territorial and household. At the territorial level, areas with the highest concentration of households in poverty are identified. Household targeting then seeks to identify poor households within poorer territories by collecting individual household data – age, sex, and level of education of members; access to, or lack of, running water and electricity; assets, including household appliances such as TVs, washing machines or bicycles – gathered by questionnaire (ENCASEH). An income regression is then used to predict income combining these factors to determine the eligibility of each household, although the initial methodology used to be a discriminant analysis to predict eligibility.⁶ The evaluation of the original targeting method by Skoufias, Davis and De la Vega (1999) concluded that it was effective and efficient in identifying households in need in comparison with alternative methods. Subsequent evaluations by Skoufias, Davis and Behrman (2000), and Coady and Parker (2005) confirm that the targeting mechanism is consistent with programme objectives. Gruenberg (2010) argues that “transparency and strict mechanisms to objectively select women into the programme are probably eliminating political intermediation and reducing the historical discretionality that characterized public policies for a long time...”

As the programme expanded to its current levels of coverage, the targeting process has been adjusted and refined to better identify poor households living in areas with lower concentrations of poverty. In the early stages of the programme, territorial targeting was developed at the community level with the goal of reducing the heterogeneity of areas to allow greater efficiency in the detection of households in poverty. This was the first time that a public programme used such information to focus its operations, applying a new geo-statistical tool explicitly designed to implement the targeting of this programme.

In the absence of a generally applicable definition of poverty, the National Coordination prepared national estimates on the basis of information from the household survey (*Encuesta Nacional de Ingresos y Gastos de los Hogares*, ENIGH-1996) and applied methodologies (consumption baskets and poverty lines) used by institutions such as the National Institute of Statistics and Geography (INEGI) and the National Coordination for Depressed Zones (COPLAMAR). This measurement was used by *Progresas/Oportunidades* to develop a new approach to identify households for inclusion in the programme.

From 1997 to 2000, the coverage of *Oportunidades* was expanded to additional rural localities, as well as to highly marginalized areas with the greatest incidence of poverty. At each site, household data were collected on the basis of a household census. In 2001, with the change of administration at the federal level, the programme was again expanded.

⁶ The programme started using income estimation in 2011 (see its Rules of Operation 2011). Previously it had been using a discriminant analysis statistical technique (see its Rules of Operation for 2010 and preceding years).

As it turned out, due to the density of households in urban areas in Mexico, none had been previously found to have high rates of poverty or marginalization. The averages notwithstanding, urban areas are characterized by great income variance and heterogeneity across households. Programme coverage was eventually expanded to urban areas through adjustments to the mechanism for territorial targeting. The marginality index was computed for smaller territorial units, called basic geo-statistical areas (BGA). This information was used to identify zones with more homogeneous socio-economic conditions and therefore with a higher and more consistent incidence of poverty. A census was then applied within each BGA to identify households in poverty. Unfortunately, this first attempt to include urban areas was not entirely successful. It pointed to a need to develop still more efficient mechanisms for territorial targeting in urban areas, since the initial targeting was only 25 per cent efficient (of four households surveyed, only one turned out to be poor). This compared with 75 per cent efficiency for targeting in rural areas.

The rationale for developing a household census in these smaller urban areas was two-fold: first, to avoid selection and data errors associated with inviting households to apply in person through a local office; and, second, to avoid the costs that such travel would impose on poor households. For both reasons, a new strategy was called for. In 2002, the programme initiated territorial targeting at the block level. By aggregating information at the block level, the privacy of personal information gathered by INEGI – the National Census of 2000 – was preserved. The mechanism used the same statistical methodology for household targeting. INEGI was asked to run the algorithm at the household level, and to provide results aggregated by block on the number and percentage of poor, eligible households (Hernández et al., 2001). Additionally, programme officers sought to improve the efficiency of household data collection by encouraging households to report to temporary mobile units, rather than dispatching census workers to their homes.

These two actions boosted the efficiency of identifying poor households in urban areas from 25 to roughly 50 per cent. However, the results of the 2003 targeting evaluation confirmed that certain types of households were still facing challenges of comparatively higher transaction costs and imperfect information that prevented them from accessing *Oportunidades*. This was particularly true of households with children under age 5 that lacked access to child-care. As a result of the evaluation, in 2004 targeting was further improved by increasing individual household visits and increasing the number of mobile modules for data collection.

As can be seen, the targeting process is responsive to the objectives and design of the programme, with interventions targeted at the household level and individual components for each household member. However, this targeting mechanism does not address intra-household inequality and precludes detection of poor individuals (particularly women) living in non-poor households. This problem is not unique to *Prospera* rather it is a general deficiency of household level poverty assessments (see Orozco Corona, 2007a and Orozco et.al. 2015), as will be discussed in section 4.

2.2.2 Termination of benefits: Disqualification and graduation

Social programmes frequently lack coherent criteria for determining when to terminate benefits. However, criteria for deciding whether to continue or terminate benefits are as important as the initial eligibility criteria for inclusion, since premature termination threatens programme goals and needless continuation wastes public resources that can be redirected to other beneficiaries in need, or in the long term to other policies responsive to new challenges.



Like initial eligibility, benefit termination is regulated by *Prospera's* Rules of Operation, which stipulate two rationales: 1) disqualifications (which include households that drop out or do not qualify based on eligibility criteria); and 2) graduation, i.e. households whose socio-economic conditions improve sufficiently over time.

Households that fail to fulfil co-responsibilities, that fail to collect their cash transfers for a certain period, or whose initial eligibility resulted from an error or misreporting of household data originally are disqualified. Research in this area indicates that disqualified households generally have better socio-economic conditions, although drop-outs may also be from more vulnerable households, particularly in urban areas (González Flores, Heracleous and Winters, 2012). Co-responsibility plays an important role as a self-selection mechanism for continuation, particularly given that the transaction costs for some households may be large in relation to the value of the cash transfers. According to Arroyo et al. (2008) and Aramburu et al. (2012), the probability of receiving a benefit is reduced in certain circumstances, namely, when the household is large, when the household head is male, and when services – water, electricity and gas – are available. On the other hand, the presence of a dirt floor in the home increases the probability of participation.

There is also evidence that the quality of the health services, rigid schedules, shortages of medications and equipment, level of care, type of service and accessibility also shape household decisions about whether participation increases their welfare (Escobar Latapi and González de la Rocha, 2003). For example, Álvarez, Devoto and Winters (2008) find differences in drop-outs of beneficiaries served by two different health services provided by the Government: IMSS-*Oportunidades* and SSA, Secretaría de Salud (Ministry of Health).⁷ The former is a centralized service managed as a part of the Mexican Institute of Social Security (IMSS) whereas the latter is a decentralized service dependent on the local ministries of health under the supervision of the Ministry of Health. Both services target the uninsured population. Using their estimates, beneficiaries of services provided by SSA show a probability of 3.1 times higher of dropping out than those from IMSS-*Oportunidades*.

While objective eligibility criteria were built into *Oportunidades'* original design to provide horizontal equity for all households regardless of locality, additional considerations arise when applying these criteria during the recertification process. Namely, it is necessary to consider the impact of differences in regional economic opportunities – for example, in small and isolated communities, the capacity development achieved through the programme may not be sufficient to obtain work or raise incomes. This holds true in those communities where few employment opportunities and little infrastructure exist. These regional differences in employment opportunities and structural constraints to economic development in remote, rural areas pose both technical and political challenges for *Prospera* (Orozco Corona, 2007b, 2009; Yaschine and Dávila, 2008; Ulrichs and Roelen, 2012).⁸

⁷ IMSS-*Oportunidades* serves more rural communities in 17 out of the 32 states of the country. To make this comparison, the authors construct and control for indices of marginalization as well as poverty characteristics of the population and indigenous presence, so that the magnitude of the type of service estimate can be interpreted as differences in the service and not due to differences in the population served.

⁸ For a discussion on the relevance of considering different levels on which poverty needs to be tackled, see Orozco Corona (2009) for territorial programmes in rural areas, and Hernández Franco, Orozco Corona and Vázquez Báez (2008); also Orozco Corona (2007c) on the analysis of urban poverty and a territorial intervention for highly impoverished urban areas which focuses on the individual, household and environmental components of poverty.

Thus, while the recertification mechanism was designed to “graduate” families from *Oportunidades/Prospera* once their circumstances improve, the absence of a national strategy for coordinating other interventions to improve access to employment means that, in reality, many of the households that leave the programme do so, not as the result of their leaving poverty, but as a result of disqualification – i.e. of the discovery of initial errors in eligibility or because households’ decisions that the co-responsibilities (or transaction costs) are too onerous in relation to the benefits received. The collaboration with the National Employment Service and with financial institutions introduced in 2015 under the *Prospera* programme partly addresses these concerns but has yet to be rigorously evaluated.

Alvarez, Devoto and Winters (2008) find an average rate of disqualification of 3 per cent each year, with important differences depending on measures of poverty and territorial marginalization. The analysis is for rural areas for beneficiaries who entered the programme in 1998. Using their findings, it is clear that wealthier households abandon the programme at an annual rate of 4.2 per cent whereas the poorest do so at a rate of 2.8 per cent. Households with men who receive the transfer have a probability of dropping out that is 14 per cent higher than those with women who receive the transfer; wealthier households have a 52 per cent higher probability of dropping out than poorer ones; and those living in localities with low levels of marginality a probability of 50 per cent higher drop-out rates when compared to those in highly marginalized areas. An area of great concern is the fact that indigenous households have a 22 per cent higher probability of dropping out when compared to non-indigenous households. Qualitative research underscores that indigenous people face additional barriers due to language and discrimination that may discourage their permanence in the programme (González de la Rocha, 2008; Sariego, 2008; Ulrichs and Roelen, 2012).



3. Linkages with other elements of the social security system

A quick overview of the evolution and characteristics of Mexican social policy will sharpen our understanding of how *Prospera* functions and of its intended and unintended outcomes. Although the programme is one of the most important interventions in social policy, its scope is clearly delimited in the National Coordination Act and in the programme's Rules of Operation. There is a broad set of programmes providing other benefits, in addition to those from *Prospera*, in the social and economic sectors. The welfare strategy pursued by the Mexican Government comprises two large axes: *social security* (understood as contributory social security schemes) and *social protection* (understood as non-contributory social security schemes).¹ *Prospera* and many other programmes are part of this latter axis.

As Yaschine and Orozco (2010) recount, the 1940s witnessed the initial articulation of the country's *social security* institutions, including the Ministry of Health, the Mexican Institute of Social Security (IMSS), and the Institute of Social Security and Social Services for State Workers (ISSSTE).² Access to social security is granted only by participating in formal employment, and includes several benefits for workers. Workers in this scheme represent only one-third of the total workers in Mexico, and they are typically concentrated in the top deciles of the income distribution.

On the other hand, *social protection* is afforded to the rest of the population that does not have formal employment, including informal workers, individuals who do not work, the retired and particularly poor people. In 1992, the Ministry of Social Development (SEDESOL) was created to coordinate social policy.³ Conditional cash transfers made their

¹ It may be noted that in other contexts, including in the ILO, the terms "social security" and "social protection", are used interchangeably (see ILO, 2014).

² Because of its contemporary relevance, one institution that remains active today bears mention: IMSS-COPLAMAR, a health supply service with community components. Known in the 1990s as IMSS-*Solidaridad*, the programme was renamed *IMSS-Oportunidades* in 2002. This service provides access to basic health care and promotes local improvements in crucial sanitation in poor and highly marginalized communities. Social participation continues to be a fundamental component of the programme. It was this intervention that initiated the clean-up of clinics and public places, called *faenas*, commonly recalled in evaluations of *Oportunidades*. Some studies about *ProgresalOportunidades* inadequately suggest that *faenas* are attributable to *Oportunidades*' co-responsibilities. Although some distortions in who helps with the community tasks might be introduced in some communities, it is conceptually relevant to distinguish where these requirements were introduced as policy instruments and through which programmes.

³ During the 1970s, increases in public borrowing and in the price of petroleum allowed the expansion of social benefits. The *Plan Nacional de Zonas Deprimidas y Grupos Marginados* (COPLAMAR) in 1976 comprised a set of programmes in poor areas intended to increase consumption through improved agricultural productivity, employment and service provision, subsidies for food consumption, and farming incentives in the poorest areas. Although these programmes set an important precedent for targeted actions, many observers questioned their effectiveness. Critics pointed to a number of problems including the duplication of functions, excessive spending, operational problems and limited achievements. By the end of the 1980s, these strategies had largely been abandoned. At the end of that decade the *Programa Nacional de Solidaridad* (PRONASOL) was implemented and intended to reach the poorest among the poor. It was a broad strategy including both targeted vouchers for tortilla as well as general subsidies; and public employment in projects to create and improve public goods. PRONASOL benefited many poor people, but suffered from a lack of effective targeting and failed to address the underlying causes of poverty. The programme was widely criticized as being "captured" and used as a tool for garnering votes (Yaschine and Orozco, 2010).

appearance in Mexico with the adoption of the *Progresa* programme in 1997, following the 1994 economic crisis. At this time, the National Development Plan adopted two objectives: 1) to improve the provision and quality of general social services; and 2) to meet the needs of the most disadvantaged. The social programmes in place at that moment were mainly generalized food subsidies and targeted, in-kind supports for tortillas and milk. The funds for these subsidies were reallocated to *Progresa/Oportunidades* to finance the new cash transfer programme.

With *Oportunidades*, Mexico put in motion the construction of a large *social protection* network intended to reach those not covered by *social security* (Orozco Corona, 2002; Gracia López, 2011). After *Oportunidades* other interventions became part of the national framework: health protection in 2003 (*Seguro Popular*); old-age, non-contributory pensions in 2006 (*70 y Más*); child-care services in 2007 (*Estancias Infantiles*); and renewed efforts to promote and broaden employment programmes. While similar public interventions had been launched prior to 2000, their scale had been constrained, their goals limited and their priority low. The following subsections describe some of these interventions which gained renewed emphasis in the first decade of the millennium and their actual or potential linkages with *Prospera*.⁴

The objective of these subsections is to emphasize that *Prospera* does not necessarily operate alone and to highlight the potential for programmatic synergies and better coordination of benefits that could also improve gender empowerment outcomes for women.

3.1 Seguro Popular

The *Seguro Popular* provides free access to health services in what are termed second- and third-level services (hospitals and speciality institutes). The programme is managed by the Ministry of Health and includes supply-side incentives to improve the quality of health services. It provides health insurance for those not covered by social security, aimed at reducing catastrophic expenditures when a health shock occurs in the family. As of 2016, the budget for the *Seguro Popular* is similar to that for *Prospera*, at US\$5.1 billion.⁵ The *Seguro Popular* resources go directly to each state and it is each local government that is charged with administering these funds to provide better quality and free services, given the decentralized nature of the health-care system in Mexico. It is a broad-based strategy intended to enhance the quality of free services for all, but with a progressively targeted subsidy that grants all services and medications free for those below the fourth income decile. Most of the beneficiaries who receive targeted subsidies are already receiving other benefits through *Prospera*. This programme provides *Prospera* beneficiaries with access to additional services beyond those included in the basic health package of *Prospera*, in particular curative services that were previously unavailable to poor households.

The interventions explicitly directed to women within *Oportunidades/Prospera* include vaccination, clinical diagnostics, self-care education, reproductive health counselling, detection of HIV/AIDS and sexually transmitted infections, diabetes mellitus, hypertension, obesity,

⁴ The new social development policy includes many other programmes, some of which are documented here given their importance for gender sensitive policy and programming and the scale of intervention. The interested reader can visit the *Inventario de Programas Federales de Desarrollo Social*, available at <http://www.coneval.gob.mx/evaluacion/ipfe/Paginas/default.aspx>; and the *Inventario CONEVAL de Programas y Acciones Estatales de Desarrollo Social*, available at <http://www.coneval.gob.mx/Evaluacion/IPE/Paginas/default.aspx>.

⁵ See for example budget data by line item in <http://www.diputados.gob.mx/cedia/sia/se/SAE-ISS-11-13.pdf>.



cholesterol, uterine and breast cancer prevention, menopause care, replacement hormonal therapy, vision examination, preventive care for addictions, treatments for depression and anxiety illness, and attention and care in the case of intra-family violence. *Oportunidades'* evaluation has documented important results in women's health and well-being as a result of these interventions (see section 4.1). Moreover, linkages with the *Seguro Popular* have the potential to further enhance women's empowerment in the health dimension.

There is significant evidence of the positive impact of the health interventions through the *Oportunidades* programme. Scott (2006) compares the income deciles distribution of beneficiaries of *Seguro Popular* with the distribution of both the uninsured population and beneficiaries of *Oportunidades*. He finds that *Seguro Popular* affiliation in 2004 was more progressive (pro-poor) than the overall use of (untargeted) SSA; "however, the observed degree of progressiveness of *Seguro Popular* falls short of that achieved by both *Oportunidades* and IMSS–*Oportunidades*" (ibid: 152). A later study by Scott (2012) reinforces this statement, underscoring that the *Seguro Popular* reaches the poor effectively. The effects evaluation of *Seguro Popular* (INNSZ 2008), indicates reductions of 55 per cent in the financial expenditure or out-of-pocket expenditures of groups included in the programme, compared to 49 per cent observed among control groups.⁶

3.2 Estancias Infantiles

Estancias Infantiles is a child-care programme established in Mexico in 2007 and administered by SEDESOL aimed at increasing the supply of subsidized care services to mothers of children between 0 and 3 years of age, living in poverty. Prior to its creation there were other child-care initiatives in Mexico: there were and continue to be a number of child-care services associated with social security, provided by IMSS and ISSSTE to formal female workers. Male workers do not have access to these programmes and promoting equality in this respect will be important to ensure greater gender equity and recognition of men's caring responsibilities.

There are also care services based at the community level developed by the System for the Integral Development of the Family, *Desarrollo Integral de la Familia* (DIF) in two modalities: community child-care centres, *Centros de Atención Infantil Comunitaria* (CAIC), and centres for child development, *Centros de Atención para el Desarrollo Infantil* (CADI). There are also centres for child development, *Centros de Desarrollo Infantil* (CENDIS) run by the Ministry of Education (SEP).⁷ Prior to 2007 these services already played a role

⁶ Following Levy (2008) some authors have raised questions about the potential negative effect of *Seguro Popular* on formal employment, since it provides non-contributory health insurance. Barros (2009), however, finds no evidence of reduction in labour force participation or in working hours. Similarly, Knox (2008) finds no evidence of disincentive effects when analysing labour participation rates or weekly working hours of household heads among beneficiaries. Arias et al. (2010) find little evidence that the introduction of social protection programmes has contributed to the growth of the informal sector. Duval and Smith (2011) do find that the *Seguro Popular* reduced the probability of looking for a formal-sector job, although the negative effect is quite small relative to other determinants of formality. Aterido, Hallward-Driemeier and Pagés (2011) also find that "*Seguro Popular* lowers formality by 0.4–0.7 percentage points, with adjustments largely occurring within a few years of the programme's introduction. Rather than encouraging exit from the formal sector, *Seguro Popular* is associated with a 3.1 percentage point reduction (a 20 per cent decline) in the inflow of workers into formality." Despite the results documented regarding possible negative incentives of public transfers for formal-sector participation, there has been no visible national, state or regional strategy to promote formal employment until 2013. After the first decade of the 21st century, the ongoing process of labour reform in Mexico still intends to improve the legal labour conditions that have prevailed since the 1940s.

⁷ For information on coverage and general characteristics, see CONEVAL, 2013.

in the provision of state support for child-care, but it was widely acknowledged that the coverage was inadequate (INMUJERES, 2008a). Moreover, the right to child-care is still restricted to women, with men having no access to such provision. The schemes based on community organization also had a very limited coverage of services.

During the first three years of operation, *Estancias Infantiles* doubled the supply of slots for child-care at the national level. The *Estancias* programme has two components. The first is a supply-side intervention to create and improve the supply of services, which gives financial support and training to women with a property that can be used to create a child-care facility. The second component focuses on the demand side by providing a monthly allowance of approximately to MXN 900 (US\$ 48.13)⁸ per child enrolled in a child-care facility. The programme coverage is national with a presence in all 32 states of the country. By early 2016 there were 9,195 *Estancias Infantiles* in operation throughout the 32 states, serving approximately 306,000 children.⁹

A programme of this kind is particularly important for the population living in poverty and for women above all, in a context where formal employment is limited and women still bear the majority of the responsibility for child-care and social reproduction. If, in addition, these women are also time¹⁰ and income poor, the lack of access to basic social services for child-care constitutes an additional barrier to their exiting poverty through employment. Calderón (2014:2) underscores this in her evaluation of the *Estancias Infantiles* (EI) programme when she states that: “[The] EI increased women’s probability of working and reduced the time they devoted to child rearing. [The] EI also caused women to obtain more stable jobs and it increased their labor incomes.”

The relevance of time poverty is particularly important if we consider the intersection of time and income poverty. If individuals are both time and income poor they have little opportunity to increase their income by working longer hours in paid employment or by generating any additional surplus that they can sell. Individuals who are both time and income poor are also likely to face more restricted opportunities in the labour or product market because they are dependent on local markets where they may have limited bargaining power to improve wages or output prices. As a result, they are more likely to remain income poor, be confined to low-wage and insecure employment, and have no savings or assets at their disposal with which to face old age or illness (Zacharias, Antonopoulos and Masterson, 2012).

3.3 Employment programmes

While much analysis and evaluation of social policy has focused on the SEDESOL programmes, there are many other interventions designed to improve employment opportunities. However, they are dispersed across different ministries, with limited budgets and overlapping objectives. Orozco Corona (2014) notes that high rates of informality as well as multiple market failures have motivated the creation of at least 51 federal programmes (in

⁸ Based on the average exchange rate of US\$ 1 = MEX 18.7 in 2016.

⁹ For more information, see: http://www.sedesol.gob.mx/es/SEDESOL/Informacion_Programa_Estancias.

¹⁰ Time poverty refers to having insufficient time for rest and recreation (see Vickery (1977), Burchardt (2008) and Zacharias, Antonopoulos and Masterson, (2012) for analyses of the implications of time poverty for social and employment policy). However, according to other authors, for the specific case of Mexico, time poverty has been defined as insufficient time to work and undertake personal activities given unpaid household work commitments (Merino, 2010).

addition to an indeterminate number of local ones) to address employment concerns – as of 2014. The annual cost of all these programmes is nearly US\$10 billion, an amount roughly double to the outlays of *Prospera*, but with no macro-level impact evaluation results¹¹ that examine the entirety of these investments as a whole in a similar fashion to the Social Development evaluations conducted by CONEVAL.^{12,13}

While different conditions and different problems call for different interventions, continuing without coordination or without a national strategy will surely yield only suboptimal results. What we have witnessed in fact, despite the introduction of the *National Crusade Against Hunger*, are: a) duplication of benefits; b) small-scale operations and fragmented programmes; c) duplication of administrative functions; d) absence of coordination across levels of government; and, as a consequence, e) enormous costs and complications that affect both evaluations and planning of new public policies.¹⁴ The number of efforts that still stand in serious need of coordination is impressive: direct credit provision, enhancing credit institutions, monetary supports for starting a business, training and technical support, linkage interventions intermediating between labour supply and demand, subsidies for production and/or consumption, and temporary employment including public employment (Orozco Corona, 2012). Each programme has its own characteristics, but in general the interventions fall into one of four categories:

- payment of temporary salaries – sometimes linked to public infrastructure investment such as repairing and maintaining roads and bridges after floods or disasters, constructing or improving roads, cleaning community spaces to prevent diseases, planting trees, improving local social infrastructure, etc. (*PET-SEMARNAT, PET-SEDESOL, PET-SCT*);¹⁵
- cash or in-kind subsidies to create or enhance business (*PROMUSAG, FAPPA, POPMI, OP, PROÁRBOL – It is called Pronafor since 2013*);¹⁶
- credit for micro-enterprises (*FONAES, FOMMUR, PRONAFIM*);¹⁷ and
- intermediation services to articulate labour supply and demand and provide training (*PAE, SOPORTE*).¹⁸

¹¹ Evaluations assessing results on the population, using indicators such as income, labor participation, etc. and a counterfactual design. See Orozco (2016) for an evaluation of a group of 11 of these programmes.

¹² The number of interventions included depends on the classification criteria used to define employment generation programmes, productive projects and subsidies to productivity. Information reported here is based on the System of Statistics of Beneficiaries (*Sistema de Estadísticas de Padrones de Beneficiarios*) compiled by the National Women's Institute (INMUJERES) with data on the federal programmes (<http://padrones.inmujeres.gob.mx>) and annexes of the Expenditure Budget for the Federation (*Presupuesto de Egresos de la Federación*) for the years 2008, 2009, 2010 and 2013. The database includes the following programmes: *PET-SEMARNAT, PET-SEDESOL, PET-SCT, PROMUSAG, FAPPA, POPMI, Opciones Productivas (OP), Soporte al Sector Agropecuario (SOPORTE), PROÁRBOL, FOMMUR, PRONAFIM, FONAES, PAE, PROCAMPO, Adquisición de Activos Productivos, Fondos Regionales Indígenas y Estancias Infantiles* (supply services component).

¹³ Evaluations of individual employment programmes and investments have been conducted and the most consistently evaluated has been the temporary employment programme (PET).

¹⁴ Although the new administration has announced new programmes and is unifying budgets, it remains to be seen if the implementation and results of these strategies will bear fruit.

¹⁵ Programmes oriented to providing emergency employment.

¹⁶ Programmes that require greater levels of education, organizational capacity and management abilities, characteristics not always present among the poorest individuals. These programmes are oriented towards enhancing labour supply.

¹⁷ Programmes that require skills, organizational capacity and management abilities, as well as certain developmental potential to take advantage of credit, characteristics not always present among the poorest individuals. These programmes are oriented to enhance labour supply, but can create additional labour demand through the growth and consolidation of enterprises.

¹⁸ Programmes designed to articulate labour supply and demand and development skills and expand labour supply.

A detailed analysis of employment policy and programmes that address women's employment is given in INMUJERES and PNUD (2012). Despite the sustained increase in these programmes during the last two decades, women represent only 41 per cent of their beneficiaries. Altogether, these programmes provide annual benefits to approximately 4.8 million beneficiaries.

Of particular importance is the temporary employment programme (*Programa de Empleo Temporal*, PET), which operates through three different federal ministries: the Ministry of Social Development (*Secretaría de Desarrollo Social*, SEDESOL), the Ministry of Environment and Natural Resources (*Secretaría de Medio Ambiente y Recursos Naturales*, SEMARNAT) and the Ministry of Communications and Transportation (*Secretaría de Comunicaciones y Transportes*, SCT). During 2010, for example, women comprised 58 per cent of the beneficiaries for SEDESOL, but only 42 and 31 per cent for SEMARNAT and SCT respectively, reflecting a gender segregation in the kind of activities promoted by each ministry.

The National Council for Evaluation of Social Policy in Mexico (*Consejo Nacional de Evaluación de la Política de Desarrollo Social*, CONEVAL) in its *Evaluation Report on Social Development Policy in Mexico* (2008) recommended the adoption of general strategies to enhance the quality of public policy interventions. The recommendation was based on an analysis of 179 programmes and the results of national diagnostics that revealed a host of problems ranging from combatting the increase in obesity to reducing high infant and maternal mortality, boosting formal employment in the face of the rapid increase in informal employment, addressing stagnant real salaries over the last 14 years, as well as persistent income and gender inequalities and discrimination.

The CONEVAL evaluation recognized both good practices and good results: good practices as evidenced in the increase in social expenditure, targeting efforts, and the agency of the people as mirrored in their complementary responsibilities, alongside good results as reflected in an increase in basic capabilities. It points to *Oportunidades* and *Seguro Popular* as important bulwarks against poverty, linking them with *Piso Firme* (Cement Floors), *Adultos mayores* (old-age pensions), and *PET* (temporary employment) as the most progressive interventions. By contrast, it identifies agricultural subsidies (*PROCAMPO*), gasoline subsidies, support for intermediate and advanced education, and formal social security as the most regressive.

At the same time, the CONEVAL evaluation acknowledged that social policy objectives were fragmented and disconnected. It stressed the need to reinforce evaluation systems, specifically in states and municipalities receiving substantial benefits from decentralized budgeting. It also noted the lack of coordination across social programmes, social security and labour policy, which significantly hampers progress in promoting employment and raising real salaries and incomes.

The evaluation of the impact of social development policy by CONEVAL in 2012 noted the limited impact of *Oportunidades* in urban compared to rural areas, since the modifications in the programme that were intended to transfer resources in response to the 2008 global economic crisis reached mainly the latter ones (CONEVAL, 2012: 58).¹⁹ CONEVAL pointed out that the limited results reflect the fact that *Oportunidades* is not intended to mitigate

¹⁹ Although the investments made through *Oportunidades* appear to have been successful in sustaining consumption over the economic downturn, the programme faces some significant challenges targeting successfully in urban areas.

poverty increases due to transitory economic shocks; also, that the effects of the crisis were more evident in urban areas, and not in rural areas where the programme is more effective. Even with these limitations, public transfers (*Oportunidades* included) prevented more than 1.7 million people from falling into extreme poverty between 2008 and 2010 in rural areas, and maintained the same poverty incidence in urban areas (CONEVAL, 2013).

Unfortunately the report does not include inequality and intensity measurements to verify the extent of the effects among the poor with and without transfers. But looking at the results (CONEVAL, 2012) in terms of the total poverty headcount (not only extreme poverty) we observe that a further 1.5 million people that were prevented from falling into poverty. That is, both results together reveal that the protection effect is not only for those who cluster at the poverty line, but there is an income-smoothing effect for the entire population benefited that represents a 14.5 per cent reduction effect in extreme poverty (the target population of *Oportunidades*) compared to a 2.8 per cent reduction in total poverty.

In the evaluation for 2014, published in 2015 after renaming *Oportunidades*, CONEVAL reaffirmed the need to improve the quality of education. Given the increase in the range of interventions, CONEVAL (2015) emphasized the importance of having a detailed programme design, clearer evaluation mechanisms and better government coordination. While recognizing the relevance of financial and labour inclusion as additional dimensions to incorporate in the programme, the report states that it is too early to assess whether these goals can be achieved.

Thus, there is potential for improved coordination between employment and child-care programmes with *Prospera*. The organization and coordination of resources dedicated to the employment programmes and their redistribution, with a greater attention to promoting gender equality, could greatly benefit women in *Prospera*, and challenge traditional gender roles in the economic sphere (potentially reinforcing greater gender equality in other ways). However, to have a significant effect among the poor, the scale and budget assigned to these programmes will have to be increased and their operations, along with the information and evaluation systems, improved. Even with expanded programme coverage and greater resources, the local context and prevailing gender norms relating to women's economic participation in particular communities and states may limit individuals' ability to take full advantage of these opportunities. Without a doubt, traditional gender roles and proscriptions about women's participation in labour markets in rural and indigenous as well as poor urban communities present an ongoing challenge for social and economic policy and programmes designed to promote greater gender equality.



4. Evaluation and impact

Before reviewing the documentation on how *Oportunidades/Prospera* has affected women's economic empowerment, it is important to reiterate that these benefits were not intended to improve either labour market participation, wages, or working hours of adult family members, but rather to strengthen the human capabilities of the next generation (education, nutrition and health), which are in turn expected to break the inter-generational cycle of poverty (promoting better personal hygiene, greater choice and control over fertility, and higher earnings in the labour market, etc.). The intervention focused on a single component of the labour market – the labour force (or supply side) but did not have any component intended to enhance local aggregate demand or employers' demand for labour, or the availability of decent work. However, given the substantial resources delivered through cash transfers and the dynamic relationship between supply and demand, one might observe limited secondary effects on the supply of jobs and employment levels in those communities where *Oportunidades/Prospera* has raised local purchasing power.¹ Numerous other interventions exist alongside *Oportunidades/Prospera* in many locations, which aim at promoting small enterprises and expanding access to credit as well as achieving a better match between labour demand and supply. Their impact, unfortunately, has been poorly documented or, when available, rarely treated rigorously. Furthermore, evaluations, where they exist, do not have randomized treatment; they seldom use a control group or pre- and post-intervention analysis that would allow us to draw more unequivocal conclusions about their role in promoting employment and securing better labour market outcomes for women (see INMUJERES and PNUD, 2012; Orozco Corona, 2012).

Additionally, many interesting questions for public policy arise only after the design and implementation of evaluations. The case of *Oportunidades/Prospera* is no exception. Although evaluations have been multidimensional, still many interesting questions cannot be answered from the available data. Most important for the purposes of this gender analysis, observations are not routinely disaggregated by sex (López and Salles, 2006). In some cases the data are recorded only at household level and individual outcomes are not documented.

These shortcomings aside, many of the evaluations analysed here do report indicators that can be associated with women's economic empowerment. Some of those indicators considered include: household income, poverty, expenditure patterns and decisions, labour force participation, working hours, wages, acquisition of productive assets, savings, investments, access to credit. These dimensions are emphasized here, along with a brief review of results relating to women's health, education and bargaining power. Table 3 provides a broad overview of the impacts documented in the studies considered in this report.

Nineteen years into *Oportunidades/Prospera*, some recent studies have examined its effects on the employment prospects of young people who received grants for school

¹ This is not surprising. A study of the impact of social pensions in Zambia by HelpAge International (2010) reports that the bulk of the pension is spent on food, with investments in small businesses, savings and agriculture being the next most important uses of the pension. In addition to improving the health and nutrition of beneficiary families, social pensions were documented by HelpAge as providing important employment and consumption spill-overs for the local economy.

Table 3. Summary of *Oportunidades/Progres*a gender-related impacts, 1997–2015

Dimensions considered	Number of evaluations reviewed	Number reporting gender-related impacts ¹
Increased use of preventive health-care services	2	1
Increased detection tests for cervical cancer, papilloma, diabetes and hypertension	2	2
Increased contraceptive use	2	2
Decreased fertility rates	2	2
Decreased adolescent pregnancy	2	2
Decreased anaemia in pregnant and lactating women	2	2
Decreased maternal mortality	1	1
Improved access to health-care services	1	1
Increased early school enrolment	5	4
Decreased school abandonment	4	3
Increased transit to secondary junior high school	4	2
Increased school attendance in junior high school and high school	3	2
Increased number of years of schooling	3	2
Increased number of schooling years with respect to parents	3	2
Decreased gender disparities in number of schooling years	3	3
Decreased indigenous disparities in number of schooling years	1	
Decreased poverty incidence, gap and severity	4	
Increased assets (household level)	3	
Increased quality of food consumption (household level)	4	1
Increased timely repayment of debts (household level)	1	
Improved terms when purchasing (household level)	1	1
Improvement of dwellings and regularization of services (household level)	1	1

attendance in earlier years. As their authors remark, these studies have methodological limitations as some do not capture, for example, the experience of those who leave their communities in order to find work. The studies do, however, provide the first evidence for employment, income and poverty outcomes for the original cohorts of beneficiaries. The following section discusses some of these studies in greater depth.

Table 3. (cont.)

Dimensions considered	Number of evaluations reviewed	Number reporting gender-related impacts ¹
Increased credit access	1	1
Increased financial inclusion	1	
Delayed age at marriage	1	1
Decreased child labour	3	3
Decreased girls' unpaid domestic work	1	1
Increased numbers of adult women working	2	2
Changes in time use and consumption of leisure	4	4
Increased propensity to initiate business	1	
Increased ownership of draft animals (household level)	2	
Increased ownership of production animals (household level)	2	
Higher inter-generational occupational mobility for women	2	2
Increased participation in collective action and increased knowledge from <i>pláticas</i> (qualitative)	2	2
Improvements in women's bargaining power within households	3	2
Increased freedom of movement	1	1
Attitudinal changes concerning traditional gender roles	1	1
Improved self-esteem and subjective well-being	1	1
Improved social capital	1	1
Total	83	56 (67%)

Note: ¹ In a few cases the gender effects were smaller for women and girls. With the exception of several qualitative studies on household bargaining and time use, this reports whether the data or analysis was sex-disaggregated and statistically significant results were documented. With regard to leisure time, the four studies evaluated here found no significant change, and three found a reduction in leisure time for women.

Sources: Authors' analysis of SEDESOL evaluations (<http://www.oportunidades.gob.mx/EVALUACION/en/docs/docs2003.php>); analysis of evaluations on IDB site on gender and social protection (<http://iadb.libguides.com/content.php?pid=169569&sid=2914177>); IFPRI and World Bank sites; and published materials and literature referenced in this document. Rodríguez Dorantes (2005) and Molyneux (2006 and 2009) were the source of a significant number of the articles and evaluations summarized here.

4.1 Health

This section summarizes the key findings that are relevant to women's empowerment from evaluations of the programme's impact on health outcomes – either directly for women and girls themselves, or indirectly as the programme affects the health of others, changing patterns of time use or caring responsibilities. The key findings emphasize that women's and children's health has improved as a result of participation in the programme. The results are particularly positive for contraceptive use and knowledge among young women, and improved health and nutrition of children. The latter benefits are likely to have had

positive impacts on women's time use, reducing the time devoted to caring for sick children. Unfortunately, many of the potential benefits from the programme are limited by the accessibility of services and the quality of these services. In the absence of a concerted effort to improve the quality of services, develop better health infrastructure, and ensure the supply of adequate and appropriate medications, the co-responsibilities of the State are not being met. Where supply-side restrictions exist, the programme cannot achieve its full potential to improve human capital sufficiently to overcome the deficits in well-being for the poor and excluded, particularly in rural areas.

There has been considerable discussion of the impact of *Oportunidades/Prospera* on health outcomes in general. Many positive results are recognized in the literature and systematically confirmed (Huerta and Medina, 1999; Orozco and Soto, 1999; Gertler, 2000; Huerta and Hernández, 2000; Escobar Latapi and González de la Rocha, 2003; Hernández Prado et al., 2005; Bautista et al., 2008; Gutiérrez et al., 2008 and 2012; Sanchez López, 2008; Gutiérrez, 2010). However, there is an important concern regarding the quality of the health services delivered which recurs in several studies. As noted in previous sections, the design of the programme does not include supply-side interventions; there are other programmes which operate to reinforce the delivery of services with the objective of improving the quality and ensuring the gratuity of services (principally through the *Seguro Popular*). However, as a result of the vast and innovative evaluation carried out in the context of *Oportunidades/Prospera*, and because of the relative absence of national studies of the same size and focus, most recommendations to improve services are directed to the *Oportunidades/Prospera* programme. Not many of them have borne fruit, since the structural failures in the provision of resources (financial, medical, human, etc.) lie beyond the reach of a targeted programme – for example, medical equipment and supplies depend on the same administration and distribution line whether they are for *Oportunidades/Prospera* beneficiaries or not.

We argue that a broader vision is required to tackle quality of care and supply-side concerns. First, the relevant actors (the Ministry of Health and IMSS, and its counterparts at the state level) are the ones with the technical and financial resources as well as the legal mandate to improve quality of services. Second, a broad strategy that also considers differences in access and levels of marginalization should be developed in the context of the universal policy adopted several decades ago for the provision of public health services. This approach could be used to overcome the structural failures in the provision of resources but will also solve problems that have been identified in *Oportunidades/Prospera* evaluations. For example, in studies supported by INMUJERES, according to Freyermuth (2011) and Lascano (2013), the health sector (including also ISSSTE, a service not related to *Oportunidades/Prospera*) face quality challenges in the same dimensions that are priorities for *Oportunidades/Prospera* (and in others such as the screening and curative services for women facing gender violence) all over the country, from urban to rural areas with different levels of marginalization. A concerted effort to reinforce the commitment to universal health care and roll-out services and make them more accountable will also benefit *Oportunidades/Prospera* and other programmes that operate in targeted locations for a targeted population of users.

The majority of studies reviewed here point to a general improvement in the health and well-being of children enrolled in the programme. This improvement is critical for any the strategy to improve human capital, enhance cognitive ability and promote better educational outcomes. However, the results of increased preventive care, reduced incidence and

duration of disease in children under 5 (diarrhoea, for example), reductions of 10 per cent in children's anaemia, and reductions of up to 20 per cent in days of sickness (Gertler, 2000; Aramburu et al., 2012; Esquivel, 2012; Gutiérrez and Rivera-Domarco, 2012) might have important consequences for women's activities in the household, their time use, and their time available for personal care or work outside the home. Time use studies, however, with the exception of some waves of the evaluation surveys, have not been part of the routine evaluations. Furthermore, measurements of time use for caregivers of sick individuals would require special sample designs and data collection beyond household surveys.

For example, Gutiérrez and Rivera-Domarco (2012), using national nutrition and health survey data, find no difference in the incidence of disease of beneficiaries and non-beneficiaries (*Encuesta Nacional de Nutrición, ENSANUT-2011*). They do find that beneficiaries make use of curative health-care services at the rate of 7.6 per cent, one percentage point more than non-beneficiaries (and a rate equal to the national use of services for the Mexican population of 7.7 per cent, as reported by Gutiérrez et al, 2012). Furthermore, compared to non-beneficiaries, *Oportunidades/Prospera* beneficiaries report greater use of tests for hypertension and diabetes, and for women, of tests for cervical cancer and papilloma. Beneficiaries and non-beneficiaries, however, do make similar use of breast-cancer tests. The effective use of services might itself reflect greater appropriation, enhanced rights' consciousness among beneficiaries, and greater agency in decision-making to seek health care and demand quality from the services provided (see Barber and Gertler, 2008).

The evaluations also report improvement in sexual and reproductive health. Hernández Prado et al. (2005), Bautista et al. (2008) and Aramburu et al. (2012) report that contraceptive use by participating women aged 15–49, married or in consensual unions, increased from 36 to 57 per cent after ten years of exposure to the benefits of the programme, although the most important change in this group occurred for young women aged 15–19, from 33 to 70 per cent. The study by Steklov et al. (2006) confirms similar results. This increase has in turn generated differences in fertility rates in comparisons with non-beneficiaries (Aramburu et al., 2012). In order to improve access and appropriate use, attention must be paid to the reasons for not using contraception. Moreover, to improve access we also need to consider that the availability of a broad range of contraceptive methods and their ease of use greatly affect women's ability to make choices and exercise their sexual and reproductive rights. For example, Sánchez Lopez (2008) reports qualitative findings from indigenous women declaring fears about unexpected side-effects. Additionally, in some areas they also report that their male partners object to the use of certain methods. This kind of information is not always captured in quantitative analysis, nor can it be confirmed with the available data. Furthermore, when undertaking surveys of this type, great caution must be exercised in order to ensure the privacy of respondents. Sánchez Lopez insists on the need to include men in family planning workshops to achieve better results (which is an important but as yet largely outstanding agenda within *Oportunidades/Prospera* when viewed from a gender perspective).

Some authors have documented the importance of relationships between different health and well-being outcomes and women's economic advancement. This is particularly true of time devoted to child-care. Working in Matlab in Bangladesh, Schultz and Shareen (2007) have shown that reductions in fertility as a result of contraceptive policies gave rise to a substantial increase in women's rates of school graduation and labour force participation. The implications for the health component of *Oportunidades/Prospera* are positive in terms of the potential economic empowerment of new generations of women. González

de la Rocha (2008) points to the practice of delaying marriage among indigenous women as a further positive indication of empowerment. However, the relationship between the use of contraceptive methods and women's labour force participation has not as yet been explored within the context of *Prospera*.

Esquivel (2012) reports that young women with less programme exposure show a significantly greater probability of pregnancy. Gutiérrez and Rivera-Domarco (2012) also show lower rates of pregnancy among participating adolescent women. However, although 90 per cent of adolescents were assisted by a doctor or nurse at delivery, within *Oportunidades/Prospera* just 39.9 per cent were provided with a contraceptive method in the immediate aftermath. This compares with a rate of 48.1 per cent among non-participants, although this difference may, as with other geographical statistics, reflect regional differences in service provision (Urquieta et al., 2008). Bautista et al. (2008) also show that longer exposure to the programme increases the probability of delivering children with the assistance of trained medical personnel. Women who started in the programme in 1998 have a 63 per cent increase in the probability of being attended by medical personnel when compared to those who became beneficiaries in 2007, even when controlling for characteristics such as infrastructure and roads. The most important impact is for women under 19 years old, for whom the probability of attending health services for delivery is 87 per cent higher when compared to older age groups.

Several studies call attention to the need for improved health services for the population participating in *Oportunidades/Prospera* (Esquivel, 2012) and to the fact that some women still do not receive adequate information related to care during pregnancy (Aramburu et al., 2012). Gutiérrez et al. (2008) evaluate the quality of services from the perspective of structural concerns and processes. At the structural level they find that 30 per cent of health units do not have a water connection, and most have regular electricity black-outs. The referral procedures from the first to the second level of services in case of an obstetric emergency require around 1.4 hours to transfer women an average distance of about 32 kilometres. The health-care units also appeared to experience substantial shortages of medications and critical inputs, which affect what services they deliver and how they deliver them. Gutiérrez et al. (2008) report that only 87 per cent of the health-care units sampled had condoms available, 89 per cent had IUDs (intrauterine device), 69 per cent had vaginal mirrors, 78 per cent had glucose straps and 49 per cent had urine straps. The latter two are required not only for deliveries but in general for the detection of diabetes and hypertension. Besides these shortages, less than 50 per cent of the observations (from both sources: health personnel and users) reported that urine and blood tests were taken in the first prenatal care consultation.²

Other results focusing on processes emphasized that personnel at the health units rarely use the written norms to follow procedures. As a result, 59.5 per cent of physicians consider (incorrectly) that laboratory tests are unnecessary for patients with metabolic syndromes. Most of the health-care units reported offering health workshops. However, in light of the often misinformed or limited responses from the medical personnel reported in Gutiérrez et al. (2008), we recommend that future research carefully review and reinforce the health-care communication strategies used in these workshops.

² Shortages in availability of IUDs, for example, have disproportionate negative effects for the poorest women and indigenous beneficiaries, as can be inferred from the preferences of methods reported by Sánchez López (2008) and Macías (2011).



Sánchez López (2008) describes the experience with, and perceived quality of, health-care services offered to indigenous beneficiaries in 12 micro-regions of the country. Her approach is qualitative and she explores the experience with and perceptions of service providers in public, private and traditional spheres. The author finds that the *Oportunidades/Prospera* programme creates and reinforces the relationship between service-providers and users. The need for quality improvement, however, is reflected in the absence of basic medical equipment which greatly affects perceptions of the quality of service offered. This relates even to basic auscultation equipment, which was missing from many facilities. Moreover, the lack of basic equipment and medications clearly discredits the campaigns and messages transmitted in health workshops about the availability of services. However, Sanchez notes that, when available, the medications provided for diabetes and hypertension were highly valued as they contribute substantially to improving the family's economy. As a result the availability of these medications also promotes greater attendance at the health units and increases the perception of service quality and the confidence of beneficiaries in the health sector.

Despite all the barriers documented in the studies devoted to measuring the quality of services, Barber and Gertler (2008) report a significant increase of 12.2 per cent in pre-natal care procedures compared to non-beneficiaries. They associate this increase with an increase in quality of services provided as a result of the CCT, reflecting improved client-service provider relations: "Higher quality received among beneficiaries of the conditional cash transfer programme is probably attributable to the programme's effect in encouraging informed and active health consumers. And Hernández Prado et al. (2005) report that from 1995 to 2002³ in municipalities where *Oportunidades/Prospera* was in operation, there was an additional impact of 11 per cent reduction in the maternal mortality ratios, as a result of improved access to health and reproductive care, compared to control areas.

Evaluations also report differences between beneficiaries and non-beneficiaries in the prevalence of anaemia in pregnant and lactating women (Aramburu et al., 2012). It is important to note, however, that these results reflect the operation of the complete benefit package (free access to services and medications, educational talks and workshops, nutritional supplements, and increased income associated with cash transfers), and cannot be attributed to individual components of the package. Such attribution would require a complex and expensive research design, which would not be viable.

4.2 Education

This section addresses the potential gender empowerment effects of education outcomes achieved through programme participation. Without a doubt, the programme has reduced school drop-out rates as well as rates of failure in advancing from grade to grade. It has also had a positive impact on early school enrolment, transition to secondary school, and years of schooling (Parker, Behrman and Todd, 2005; Todd et al., 2005; Parker and Behrman, 2008). In rural areas, high school enrolment increased (Parker 2005). The percentage of children enrolled in secondary education increased to 42 per cent for boys aged 12 and 33 per cent for girls of the same age (Behrman, Parker and Todd, 2005). Beneficiaries between 19–20 years old in 2007 showed an average increase in schooling of 0.9 school years. In the age range 17–18, the effect is greater for women: 0.85 years compared to 0.65 for men (Parker and Behrman, 2008).

³ These authors compared findings to two years prior to the start of the programme as baseline.

Improved education should in theory enable both boys and girls to participate more productively in the labour market, earn higher wages and achieve greater occupational mobility. However, concerns about the quality of education offered, particularly in rural areas, should prompt all levels of government to increase investments in school infrastructure, promote the training and retention of teachers, and secure continual improvements in curricula over time. Without these parallel investments, the quality of education may also be insufficient to enable children from poor rural or depressed urban areas to overcome the prevailing inequalities in educational achievement.

Impacts on education have been studied from both qualitative and quantitative perspectives. Adato et al. (2000) find clear signs of parental gender preference for school achievement in general, where more educated fathers favour sons. Mothers also frequently favour sons because of the assumptions that boys are going to be breadwinners whereas girls are going to marry and have children. These authors suggest that empowering effects are likely to be stronger in the long run since women within the programme increasingly place a higher value on girls' education.⁴ These authors also find that in addition to the cash transfer effect on school results, there are differential effects attached to other components of the programme, such as the interchange of information in community meetings. Engagement in community activities and meetings may also promote empowerment spillovers as women emerge as local leaders and have voice in community fora.

Despite the claims about preferences for the education of sons, affirmative action in more generous scholarships for girls in rural areas to enrol in junior high and high school has resulted in an increase of 11 to 14 per cent in the probability of enrolment, compared with an increase of 5 to 8 per cent for boys (Parker and Scott, 2001). After receiving cash supports for two-and-a-half years, the estimated average increase in years of schooling for girls was 0.38 years while for boys it was 0.15 years. Schultz (2000) reports a smaller gender gap for the initial years of the programme. The effect for girls is therefore 150 per cent greater than for boys.

Yaschine (2012) reports that the first cohort of school beneficiaries ten years after entering the programme showed increased years of schooling compared to their parents. She notes the role of cash supports in narrowing the disparities between girls and boys and between indigenous ethnic groups and the general population.⁵ However, she remarks that even with these promising outcomes, the average attainment of years of schooling for programme participants does not yet reach the national average.

Mancera, Priede and Serna (2012) attempt to determine the impact of *Oportunidades/Prospera* on educational achievement. To do so, they analyse the results on the official examinations administered by the Ministry of Education to students throughout the country (ENLACE). They use the administrative registers in each school to distinguish participating students from others. They find a substantial reduction (21 per cent) between

⁴ Women (beneficiaries and non-beneficiaries in programme communities) underscore in response to questions about girls' education that it is important: to improve their abilities to get employed or obtain better employment and to be able to support themselves and their children if their marriage fails; to have a better life, secure greater personal development and an improved position in the family; to defend themselves in their relationships with men and in public; and to value themselves.

⁵ Van de Gaer, Vandenbossche and Figueroa (2013) also find that health disparities are narrowing for children from indigenous communities. These authors conclude that gains in health opportunities for children from indigenous backgrounds are substantial and are situated in crucial parts of the income distribution, whereas gains for children from non-indigenous backgrounds are more limited.

the two groups in the learning gap from 2008 to 2011 as measured on the ENLACE scale. The reductions were smaller for rural areas and for multi-grade schools. At completion of primary school the narrowing of the gap is smaller for girls (18 per cent) than for boys (23 per cent).

Researchers repeatedly insist on the need to improve the quality of public education generally in Mexico and specifically in rural areas (Ortega, 2011; Aramburu et al., 2012; Mancera, Priede and Serna, 2012; Yaschine, 2012). Unfortunately, these authors agree that such improvements fall outside the scope of *Oportunidades/Prospera*.

4.3 Income, consumption, poverty

This section focuses on improvements in household income and consumption and reduction in poverty rates and their implications for women's economic empowerment. The findings from almost 20 years of programme operation are that income increases in beneficiary households. Moreover, most evaluations conclude that the benefits are well-targeted to the extremely poor and progressive, and that leakage and under-coverage rates are acceptably low.⁶ Stampini and Tornarolli (2012), for example, calculated that the exclusion error is 46.6%; similar to the Brazilian *Bolsa Familia* (44.9%), but considerably lower than the Argentinian *Asignación Universal por Hijo* (52.6%), the Peruvian *Juntos* (62.6%) and the Chilean *Chile Solidario* (67.3%).

There is substantial evidence that income and consumption has risen in beneficiary households and that these effects have stimulated increased investment in productive and household assets, greater diversification of household economic activities, increased savings, increased creditworthiness and reduced income volatility. As a result, the severity of poverty is reduced and in some cases households are able to leave poverty. Unfortunately, poverty data are not disaggregated by sex and no provision is made for intra-household inequality; as a result it is difficult to estimate the number of women who leave poverty. Moreover, some of the exclusion or under-coverage may relate to poor women and children in non-poor households – a concern that lies beyond the programme's ability to address. The increased investment among households, however, particularly those that were not recertified and "exited" poverty, suggests that the acquisition of durable household assets, such as refrigerators and stoves, may reduce women's time burdens and free up time for other activities.

There is also evidence that *Oportunidades/Prospera* may crowd-in other municipal programmes and that the synergies between these programmes can improve women's incomes and reduce time burdens. This is most prominently the case in public water provision. Finally, increased incomes and consumption may have important local spill-overs, dynamizing the economy and contributing to diversifying economic activities. While this is as yet insufficiently studied, there may be important economic empowerment benefits to be reaped by women in such circumstances.

The effect of cash transfers on household income and income poverty has been widely documented. Skoufias, Davis and Behrman (2000) report an 8 per cent reduction in the incidence of poverty, directly attributable to the programme, based on a 52 per cent

⁶ This is based on the objectives of the programme. We do not discuss the benefits of universality versus targeting here, but evaluate the programme on its own terms.

poverty rate in rural areas. The same study found that the poverty gap was reduced by 30 per cent, whereas poverty severity was reduced by 45 per cent.⁷ These results imply that the greatest impacts of *Oportunidades/Prospera* were on the poorest among poor households. That is, transfers made this group's poverty less severe, but were not sufficient to move significant numbers of the poor above the poverty line (as evidenced by much smaller effects on the poverty head count ratio). These results are computed almost at the initiation of the programme, based on the original targeting model and the limited coverage in rural areas. They reflect the targeting mechanism characteristics rather than the actual national coverage and operations influences on delivery to poor beneficiaries.

The same study by Skoufias, Davis and Behrman reports a balanced error of targeting with equal rates of leakage and under-coverage of 0.264.⁸ Comparing different methods and costs of targeting under a fixed total budget, these authors find that leakage and under-coverage rates under the *Progresa/Oportunidades/Prospera* mechanism are substantially better, demonstrating greater efficiency. These authors report that under-coverage and leakage rates under different types of targeting methods are 44.96 and 20.19 per cent higher than the targeting and transfer methods applied through *Oportunidades/Prospera*. Also, when leakage is compared to a uniform transfer alternative it is reduced by 44.99 per cent, using the programme's mechanism.⁹ In terms of transfer shares for the poorest, Coady, Grosh and Hoddinott (2004) find that the poorest 10 per cent of Mexican households receive 22 per cent of transfers, the poorest 20 per cent receive 39.5 per cent, and the poorest 40 per cent receive 62.4 per cent of transfers from the programme. This clearly demonstrates that the programme is well-targeted and progressive.

Coady and Parker (2004) find an under-coverage rate of 0.24 and a leakage rate of 0.22 in urban areas. They consider that this rate of leakage is not critical, since about 15 per cent of households included in the programme cluster near the poverty line. Coady and Parker (2009a, 2009b) also point out the importance of the administrative targeting and self-selection approach to filter out middle- and higher-income households. These authors suggest that targeting can be improved by redesigning the means test and differentiating transfers according to certain demographic characteristics. Refinements to the targeting methodology have been made continually – revising and improving the multidimensional approach. Azevedo and Robles (2010) confirm that the multidimensional identification of beneficiaries increases the welfare impact of transfers compared to alternative targeting models. Moreover, these authors highlight the results from the qualitative evaluation by Escobar Latapi and González de la Rocha (2003) showing that “the targeting mechanism was positively perceived by households as it bypasses political affiliations and local leaders”.

⁷ Based on analyses using the Foster, Greer and Thorbecke measures of poverty and inequality. Roughly 1.7 million people left poverty from 1997 to 2000.

⁸ A study by Soares, Ribas and Osorio (2007) analyses the targeting performance of *Oportunidades* in 2004, seven years since operations started, and thus a result already influenced by operations and coverage of the programme. Their measures are not strictly comparable to the ones from Skoufias, Davis and Behrman (2000), since in order to compare the performance of Mexico's and Brazil's CCT programmes they adjust the income definition of Mexican data to the Brazilian criteria. Still, they find a better performance of *Oportunidades* for the 20th percentile and similar numbers in both programmes for the 30th to 40th percentiles. Soares (2012) points out that the targeting index used by *Oportunidades* is less volatile than income used by the Brazilian programme.

⁹ Skoufias, Davis and De la Vega (1999) develop an analysis with a poverty rate of 78 per cent, confirming similar results, with a poverty reduction effect of 9.88 per cent, a slightly less efficient reduction compared to a locality targeting since poverty rate is higher. Of course poverty reduction at the 52 per cent level is increased significantly when additional households are eligible, since exclusion errors are reduced. The authors' estimate of the effect of *Oportunidades* increases to 21 per cent.

Similar patterns of poverty reduction were documented in subsequent years, for example, by Székely and Rascón (2005), Cortés, Banegas and Solís (2007)¹⁰ and Fiszbein and Schady (2009). Furthermore, Fiszbein and Schady report very similar results to those of Skoufias, Davis and Behrman (2000).¹¹ These results, however, are influenced by the number of years considered and the overall coverage. This means that estimates for leakage, under-coverage and the (per)centile distribution of benefits must be interpreted with caution, since these measures are affected by improvements in the conditions of beneficiaries associated to the programme years of exposure (for example, effects on productive income documented by Gertler et al., 2012) or simply by other sources of improvement or regression induced by changes in the country economy (positive growth or economic crises), in comparison to the moment that their initial socio-economic status was evaluated at the programme outset. As a result, these estimates commonly overestimate efficiency measures due to the targeting; they can only be interpreted as an instant picture of how beneficiaries are positioned in the income distribution and the poverty cut-off.

However, both leakage and under-coverage estimates in a certain year are extremely useful for subsequent programming decisions about strategies to increase coverage. Whereas leakage can be acceptable on the basis of poverty mobility and the fact that temporarily exceeding the income poverty cut-off does not guarantee a sustainable improvement in well-being (individuals/households can fall into poverty again), under-coverage reflects the relative low mobility of the programme's list of beneficiaries and exclusion errors, in which individuals/households subsequently falling into poverty are left out. Low rates of under-coverage are critical to ensure that the most needy are being reached through the programme.

It is difficult to determine the programme's impact on gendered poverty reduction, primarily because data on poverty reduction are not routinely disaggregated by sex. However, using the international datasets from ECLAC, we can determine that there seem to be no significant gaps in male and female income poverty incidence at the national level in the period from the mid-1990s, when *Oportunidades/Prospera* started, to the present.¹² Using the statistics from the National Women's Institute (INMUJERES),¹³ however, we find a significant gender gap for income poverty incidence of about 15 per cent for women in reproductive ages (from 20–34 years old). This gender gap remains practically constant during the period of analysis. As we know from how poverty is measured and the operational criteria used to target beneficiaries (based on poverty measurement), it is not unreasonable to conclude that the positive effects of the programme apply to both men and women in poor households without great differences in the benefit incidence. It is widely understood, nonetheless, that women face different risks of poverty from men; they have more limited access to productive and financial resources and more precarious property rights, lower

¹⁰ The study by Cortés and others finds that, for the poverty thresholds used in the *Oportunidades* targeting method (capability poverty), the rural poverty head count index fell by 5.3 per cent in 2004 compared to what it would have been without the programme; the poverty gap index fell by 14.5 per cent; and the poverty severity index by 19.9 per cent. In urban areas, the respective differences with and without the programme were 1.5, 3.4 and 0.5 per cent.

¹¹ Our calculations of percentage change on the basis of the numbers of Fiszbein and Schady show reductions of 8.3, 24 and 41.6 per cent in incidence, intensity and inequality attributable to the programme transfers.

¹² Using the numbers from CEPALSTAT for the methodology of the Economic Commission for Latin America and the Caribbean (ECLAC). Available at: http://estadisticas.cepal.org/cepalstat/WEB_CEPALSTAT/Portada.asp.

¹³ INMUJERES uses the official income poverty methodology from CONEVAL for the first decade of the century and retrospectively disaggregates sex and age groups. Data source available at: http://estadistica.inmujeres.gob.mx/formas/muestra_indicador.php?cve_indicador=1152&Switch=1&Descripcion2=Porcentaje&indicador2=1059&original=0&fuente=1059.pdf&IDNivel=2.

rates of employment and a greater predisposition to informal employment. Consequently, poverty rates may be higher for women (United Nations, 2010) and the equal distribution of benefits through the programme may not address these gender-based inequalities.¹⁴

In addition to considering economic empowerment through increased income, empowerment can also be considered from the point of view of consumption. From this perspective the consumption of free goods and services will fulfil some basic needs deficits, leading to a higher standard of living. The evidence demonstrates that cash transfers through *Oportunidades/Prospera* increased consumption in beneficiary households and improved the quality of food consumed by increasing consumption of protein and vegetables (Angelucci, Attanasio and Shaw, 2005; Attanasio and Di Maro, 2005; Escobar Latapi and González de la Rocha, 2005; Gertler, Martínez and Rubio, 2005). The analysis by Angelucci, Attanasio and Di Maro (2011) also sheds light on possible gender differences in consumption and attributes the proportional increase in food consumption to the fact that targeting the cash transfers to women can change the balance of power within the household.

Rubalcava and Teruel (2002) found evidence that increased income leads to increased investment in assets. They analyse the recertification surveys in rural areas from 1997 to 2002 that were used to determine whether individual *Oportunidades/Prospera* households would continue in the programme, graduate, or be disqualified. In this analysis each household is scored using a standard statistical model to determine its economic condition at the moment of inclusion compared with the household's condition after three years of benefit receipt. This analysis yields a two-by-two matrix with four possible categories reflecting change over time: poor/poor, poor/non-poor, non-poor/poor, and non-poor/non-poor.¹⁵

This comparison shows an increase of 17.8 per cent in income for households that exceeded the recertification threshold (i.e. were no longer considered poor). This income was devoted to investment in household and productive assets. With the exception of households that shifted from non-poor to poor, rural families largely invested in durable assets. Among households recertified as non-poor, 55 per cent had a refrigerator, 35.8 per cent had a gas stove and 28.6 per cent a washing machine. These results are relevant to women's empowerment since these items reduce women's time spent on domestic work. Using the National Time Use Survey (*Encuesta Nacional de Uso del Tiempo*, ENUT 2002), Orozco Corona (2005) reports reductions of up to seven hours a week when these assets are present.

In urban areas,¹⁶ Escobar Latapi and González de la Rocha (2012) report that the greater predictability and stability in household income associated with *Oportunidades/Prospera*

¹⁴ See *Progresá* (1997) on gender disadvantages. Orozco (2007a) analysed the Official Mexican Poverty Measure from a gender perspective, taking account of earlier work by Kabeer (2003), Presser and Sen (2000), and Chant (2003). Orozco studied the composition of the basket of goods with which the official poverty lines are computed and assessed the targeting of social programmes. The study proposed the inclusion of additional basic goods and an Engel decomposition to differentiate the poverty rates of men and women. Tepichin et al. (2009) show the results of a preliminary exercise using the ENIGH 2006 for a sex decomposition of health expenditures to construct poverty lines on the basis of their analysis. Their evidence suggests a difference between 1 to 2 percentage points in the incidence of poverty, even with the limited data available to assess differences in health necessities for year 2006. The study also reflects that the simple disaggregation of health needs might increase measures of women's poverty by up to 14 per cent in urban areas compared to the official measure in year 2006. This finding is consistent with available information for the past decade.

¹⁵ The availability in the study of a group of households classified as non-poor is due to variation in the household targeting criteria between 1997 and 2002. As a result of this variation, the model used for recertification includes slight differences in the classification of poor and non-poor in use at the time of original eligibility determination.

¹⁶ For detailed characteristics of the urban evaluation see Gutiérrez (2010).

enabled advance planning of expenditures and investment in assets, more timely repayment of debts, and access to better terms when making purchases. Moreover, the assurance of sustained income improves women's perceived and actual creditworthiness within their communities. The authors also find an indirect effect on improvements in household services (water and electricity) and on general living conditions. *Oportunidades/Prospera* cash transfers allow families to make structural improvements in their homes, to increase their security through formalizing property agreements, and to obtain or regularize access to services such as public water supply.

It appears that *Oportunidades/Prospera* may crowd-in some public services and programmes. Once operations have begun and the locality has been targeted, other state and local level programmes often follow. This has the potential to reinforce *Oportunidades/Prospera's* objectives. In some cases, investment in local infrastructure has also contributed to greater community benefits. The role of publicly available, piped water is particularly relevant for women's empowerment. At the national level, Orozco Corona (2009) finds that indirect benefits accrue from the reduction in domestic work associated with public water provision. She reports the cost of water provided by non-public sources as being 25 per cent higher. Thus regular access to publicly provided water not only lightens the burden of domestic work but also frees up cash resources for the acquisition of goods and services that might otherwise be unavailable.

The positive findings on the formalization of services and property rights notwithstanding, information on who owns which assets among household members, or who benefits from these investments, is scant. As a result it is difficult to determine the extent to which changes in asset ownership, credit access, service improvements, etc., are empowering women or other members of the household.¹⁷

According to Escobar Latapi and González de la Rocha (2012), improvements in dwellings are not always attributable to *Oportunidades/Prospera*. They may also result from other federal or municipal programmes. This observation suggests once again the importance of coordination among programmes with distinct but complementary objectives.

4.4 Labour force participation and time use

This section addresses women's labour force participation and time use. The studies reviewed here find no clear impact on adult labour force participation in beneficiary households, but demonstrate that child labour outside the household is reduced – particularly for boys. There is also evidence that girl children may reduce the number of hours devoted to reproductive tasks. These two findings combined support the view that children have more time to devote to studying and acquiring greater human capital, which has the potential to translate into improved employment opportunities. Several authors have documented an increase in women's labour market participation among working-age women in beneficiary households – but this can hardly be seen as a widespread or generalizable result.

Several cohort analyses of beneficiaries who entered and graduated from the programme, finishing their education, suggest that both young men and women experience upward occupational mobility when compared with their parents (whether they remain in their

¹⁷ See for example the work by Gertler et al. (2016) which does not even attempt to differentiate assets owned by household member but explores access to and ownership of energy-using assets at the household level that could be crowded-in through programmes like *Oportunidades/Prospera*.

communities or migrate to urban areas). This effect may be stronger for girls, but could also be a statistical artefact, since most of the girls' mothers do not work. However, the same result is observed when comparing the girls' occupational mobility with respect to their fathers' occupational status – reinforcing that these effects are likely to be valid. One analysis that looks at migrant beneficiaries reports that when women work, they frequently enjoy better working conditions and more skilled employment than men and non-migrants. It is important to note that employment effects may be hard to document, given the structural nature of poverty at a local level. In the absence of efforts to explicitly generate employment or stimulate local demand, conditions exogenous to the household are likely to over-determine employment outcomes.

The effects reported for time use for adult women in beneficiary households require further assessment. While the direct benefits of reduced mortality, morbidity and improved child health may reduce time burdens, greater school enrolment and reduced child labour could potentially redistribute more household tasks to mothers, increasing their time burdens. There is evidence that programme participation has had a negative effect on adult women's leisure time, while men's remains largely unchanged. Further analysis of the programme from the perspective of time use and time poverty would be required, however, to generate unequivocal findings.

Since positive impacts in education (years of school) are expected to have important effects on employability and earnings, most studies explore this relationship.¹⁸ Additionally, some evaluations explore labour market participation and time use. The analysis of time use is crucial to a fuller understanding of poverty and work from a gender perspective, since this indicator measures activities not considered in traditional labour market analyses (Orozco Corona, De Alba and Cordourier, 2004; Orozco Corona, 2007a; Gammage and Orozco, 2008; Orozco Corona, 2009; Tepichín et al., 2009; Merino, 2010;). Together with time constraints (as discussed above), prevailing norms limiting women's roles and assigning responsibilities may constrain their labour force participation, the types of work they can do, and even their leisure and the time available for personal care.¹⁹

¹⁸ According to Yaschine (2012) for example, 73 per cent of young people report the main benefit of education as better access to a "good" job, while 39 per cent see it as a way to make money. In this particular case the original data source does not break down responses by sex; future research could further explore young people's vision of work as a pathway to escape poverty, to relief from domestic duties, and to greater autonomy within the family. Many other studies of *Oportunidades/Prospera* measure impacts on labour force participation or labour income: Parker, 1999; Parker and Skoufias, 2000; Skoufias and Parker, 2001; Parker and Scott, 2001; Rubalcava and Teruel Belismelis, 2002; Gertler et al., 2004; Escobar Latapi and González de la Rocha, 2003; Todd et al., 2005; Behrman et al., 2010; Rodríguez-Oreggia and Freije, 2008; Parker and Gandini, 2009; Rodríguez-Oreggia, 2010; Ibararán and Villa, 2010; Aramburu et al., 2012; Rodríguez-Oreggia and Freije, 2012; Gertler et al., 2012; Yaschine, 2012.

¹⁹ For example, a study by Gammage and Orozco (2008) analysing time use and labour force participation in Mexico and Guatemala shows a negative association between the presence of small children and women's labour force participation, with a decline of 6 per cent in the probability of employment for each additional child. By contrast, the presence of children had no impact on men's work. While the study does not take into account the presence of child-care services, virtually none were available at the time that it was carried out. Unfortunately there are no *Oportunidades* programme evaluation results focusing on this issue, but the result is still relevant since *Oportunidades* households have more small children than non-poor households, and because, as well, of the substantial share of GDP that women's caring and domestic unpaid work represents. The results of this study were used to compute a national estimate of unpaid work totalling 20.2 per cent of GDP at market prices in 2002, as a way to illustrate the value of unremunerated domestic services. A recent official estimate for Mexico by the National Institute of Statistics and Geography (INEGI, 2011) stands at 22.6 per cent of GDP, of which one-third corresponds to child-care. These estimates illustrate the huge potential macroeconomic impact of gender-sensitive policies to alleviate women's time burdens.

Oportunidades/Prospera has the explicit goal of reducing child labour. Scholarships for students under 22 years of age are calculated to offset 90 per cent of the opportunity costs of redirecting time from work to study (Orozco Corona, 2002). In the early years of *Progresar/Oportunidades/Prospera*, Parker and Skoufias (2000) explored the relationship between time use and public transfers as part of the programme evaluation. The researchers find no evidence of perverse effects of reductions of time devoted to labour force participation among adults, for either men or women (also confirmed by Skoufias and Di Maro, 2006; Lindert, Skoufias and Shaphiro, 2006). Moreover, they found a 14 per cent reduction in work time outside the home by children, coupled with substantial increases in the time they devote to school-related activities. These authors find reductions in time devoted by girls to unpaid work within the household. This last result highlights the effectiveness of gender-affirmative action scholarships, but also indicates a movement away from the traditional role where girls stay at home and undertake domestic chores and parents exhibit marked son-preferences, as documented by Adato et al. (2000).

A study by Parker, Behrman and Todd (2005) over a longer period of time using labour indicators reports a decrease in the probability of working for children between 10 and 14 years old in 1997, which compared to paired controls, dropped by 35 and 29 per cent respectively in 2003. In rural areas the probability of children working is mainly reduced for agricultural employment. However, they find no impact for girls, given that their labour force participation prior to the programme was already low.

Using a different approach, Rubalcava and Teruel Belismelis (2002) compare certification and recertification surveys and show an overall increase in labour force participation of 5.3 per cent, but for adolescents (aged 13–17 in 1997) the increase in 2002 is nearly four times larger, 20.6 per cent. Men's labour force participation increases by 6.3 per cent for the group as a whole and 29 per cent for youth. This reflects a higher percentage increase for men than women, since for the latter, labour force participation increased by 4 per cent for the group as a whole but only 9.3 per cent for teenagers (aged 13–17). The increase in labour force participation for young men is thus five times greater than that for all men, but the same comparison for young women shows only a twofold increase compared with all women. They also find that whereas the fraction of men working increases more than for women, this is not true for the age group 25–65, where women's labour participation increases by 5.2 per cent compared to only 2.2 per cent among men, i.e. more than double for those of working age. That is, increases in women's labour market participation occur among working-age women instead of among women in school ages, which is a positive result. However, the authors do not interpret their results as directly reflecting improvement in conditions.²⁰

Up to this point the results refer to the programme's impact in rural areas, the initial territorial intervention. For urban areas, the early qualitative studies showed no important changes related to child labour, neither among girls or boys (Escobar Latapi and González de la Rocha, 2002). However, an evaluation by Todd et al. (2005) shows similar results for children from urban and rural areas. These authors find an important decrease in the

²⁰ One of the limitations of this analysis is that it is based on just two points that are close in time and we have no information on control cases. Furthermore, there is no information in the study disaggregated by sex at the individual level. As a result, we are unable to determine the extent to which the increase in female labour force participation contributed to the transition from poor/non-poor classification of households that we analyse in this document (see section 4.3). Such data are, however, available in the original sources, allowing for such analyses at some future point in time. The information available from evaluation surveys provides ample additional data for further exploration.

percentage of children aged 12 who work.²¹ They also find that after a year of intervention there is a reduction of 48.6 per cent in the labour force participation of young men (aged 19–20). For women in the 15–18 age range the reduction is 36.7 per cent. According to Behrman, Parker and Todd (2010), from ages 12–14 to 15–18, the percentage of working children increases from 10 to 44 per cent for boys and 10 to 27 per cent for girls (compared with the baseline evaluation for 2002 in urban areas). In this study, compared to matched control groups, *Oportunidades/Prospera* decreases labour force participation for children 12–14 years old by 8 percentage points in the first year of receiving benefits and around 13 percentage points in the second year. For young women, there are significant impacts only for the group 15–18 years old; a reduction of 11 per cent was observed only in the first year.

Although most of the evaluations are designed to explore reductions in child labour in combination with no observable adult work disincentives, Gertler et al. (2004) and Gertler et al. (2012) adopt a different approach. These authors explore the potential impact of cash transfers on productive investment, the creation of non-agricultural micro-enterprises, land use, acquisition of production and draft animals, and agricultural activity. The authors use the ENCEL survey of 1997–2003 to estimate the probability of such investments, as well as a survey they devised and collected in 2004. They use two approaches to measure potential impacts: first, programme participation; and second, the level of cash supports over the course of participation. They find that households spend 74 cents out of each peso received and invest the rest. At the baseline, 53 per cent of entrepreneurs were women and a large fraction of reported cases (36 per cent) of investment was in a micro-enterprise. It was primarily the woman receiving the cash transfer who ran the business. As a result of the programme intervention, when compared to controls, beneficiary households report a 9.6 to 12.2 per cent increase in agricultural income, a 5.6 per cent increase in long-term household consumption, and an increase in the propensity to participate in non-agricultural micro-enterprises of 67.3 per cent. Households in *Oportunidades/Prospera* are 17.1 per cent more likely to own draft animals and 5.1 per cent more likely to own production animals (cows, goats, sheep, etc.). Moreover, cash transfers improve access to credit, enabling poor households to overcome liquidity constraints and other market failures that retard investment. The authors conclude that cash transfers may increase the aggregate productivity of the local economy.

The most recent evaluations of *Oportunidades/Prospera* emphasize the evaluation of inter-generational labour mobility. These studies try to assess whether children of *Oportunidades/Prospera* households are able to secure better jobs than their parents. They compare the employment of youth 14–24 years of age (16–24 and 24–28 in some cases) with that of their parents. However, the authors warn stakeholders to be cautious when interpreting this sort of metric, first because, as already mentioned, *Oportunidades/Prospera* itself is mainly oriented toward developing human capabilities and does not increase the supply of well-paying jobs; and second, because youth in the age group examined may not be employed simply because they are still in school, complying with an objective of the programme to increase human capital acquisition.

When analysing labour market insertion it is particularly important to take into account that labour opportunities may not be available in the same communities where the

²¹ Bando, Calva and Patrinos (2005) report similar findings and find that indigenous children in the programme had lower probabilities of work compared to control group households.

beneficiaries live. Some beneficiaries may migrate from their original communities and others may stay (non-migrants). Because of this, evaluation surveys at the household level might overlook migrants and underestimate potential impacts. The more successful beneficiaries may have additional abilities, superior networks, or other similar advantages, and thus leave their home region for better employment opportunities elsewhere. As a result, there is likely to be a selection bias when analysing labour market outcomes for those beneficiaries who stay in their communities. Evaluators have been concerned with this issue since the very beginning of the programme, and have suggested additional data collection and analysis to overcome this potential bias.²² As Rodríguez-Oreggia (2010) documents, this very important methodological issue could influence the programme's impacts on labour market outcomes.

Rodríguez-Oreggia and Freije (2008) developed an estimate of *Oportunidades/Prospera's* impact on labour force participation and inter-generational social mobility among non-migrant rural beneficiaries between 15–24 years old in 2007.²³ The authors conclude that the employment conditions of this group are more precarious than those of young people of the same age in the rural population as a whole. They do not find a significant effect on inter-generational mobility (change in occupational status, income or formal employment status, when compared to parents) for the whole population, but find a positive and significant effect for women who were employed.²⁴ They also find a positive impact of 12.6 and 14.6 per cent respectively on the income of men with primary and secondary school, a finding they attribute to schooling. The authors find no effects on income for either men or women with more education, i.e. completion of high school, but remark that the additional years of school attained by beneficiaries improve equality at the moment of entering labour markets with respect to non-beneficiaries with the same educational levels.

However, in a later study with improved data²⁵ and including migrant youth, Rodríguez-Oreggia (2010) finds a total upward occupational mobility of 59 per cent for women versus 40 per cent for men, when compared with the occupation of the father. The effects of migration show huge gender differences: for example, women migrating from the original household but within the same locality attain an upward mobility of 56.8 per cent compared to only 28 per cent for men. Upward mobility is the highest for migrants to other localities in Mexico, 77 per cent for women and 73 per cent for men. Reflecting the availability of good jobs or better jobs in each locality, leaving the community appears to secure greater returns in the labour market for both men and women.

²² Parker and Scott (2001) analyse data on migrant youth reported in the household surveys. They find that between 1997 and 2000, at early stages of the programme, 28.1 per cent of young men and 26 per cent of young women beneficiaries left their households. This migration rate is lower by only a single percentage point than that of a non-participating comparison group that also includes both sexes. However, they find positive, but not statistically significant, evidence that those in *Oportunidades* left the household seeking a job (58.4 versus 54.9 per cent), whereas more non-beneficiaries left to get married (31.3 versus 25.9 per cent). It is important to note that young peoples' decision to remain in school is one of the reasons why *Oportunidades* has had no significant effects on labour income of this age group. Ibarrarán and Villa (2010) find that participation in *Oportunidades* has no impact on the quality of employment of non-migrant individuals aged 14–24. While they suggest that the lack of impact may be attributable to precarious employment conditions generally, they caution readers about missing observations associated with migrants who leave their communities for possible work elsewhere and whose experience is not captured in the evaluation of household surveys.

²³ They used administrative records to match exposure time to the programme locality levels with the evaluation survey ENCEL 2007.

²⁴ They use the classification with eight categories of labour capabilities by González De la Rocha (2008).

²⁵ He used administrative records to match exposure time to the programme at individual and locality levels with the evaluation survey ENCEL 2007 and the special migrants' module (2008).

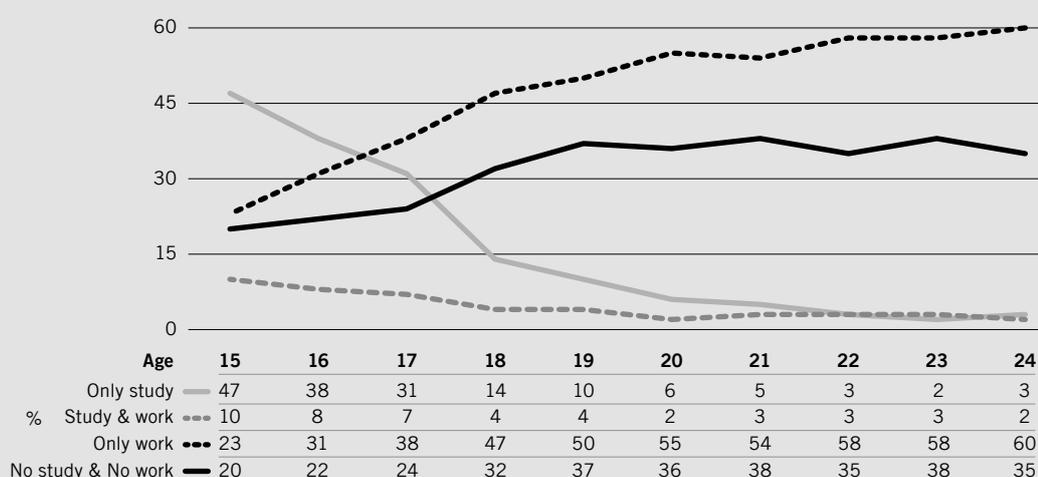
There is also a positive and significant impact of the programme on non-migrants' upward mobility, but when controlling for different socio-economic variables the effect is no longer significant and mobility is explained mainly by improved education (a key impact of *Oportunidades/Prospera*). The programme impact estimates for those who do not leave their community remain statistically significant only for women and indigenous peoples, and is the highest for indigenous women. Although the author does not go through this interpretation, according to his regressions men are 33 per cent less likely than women to experience upward mobility. This is not surprising, since many women do not work outside the household, therefore any labour market participation for beneficiary generations would imply upward mobility in this dimension. Another interesting issue emerging from this analysis is that the presence of children under 8 in the household does not affect women's mobility (which might be a sign that young women beneficiaries are not confined to the traditional role of caregivers for younger children).

Rodríguez-Oreggia (2010) recommends that we also evaluate the impact in terms of real salaries and employability, since occupational mobility might not change but productivity can change because of increases in capabilities. The author explores wage effects and finds that beneficiaries obtain salaries 43 per cent higher than non-beneficiaries, which he concludes is attributable to the programme. He points out this can be a signal that the programme is working and having a positive incidence on labour productivity, but he cautions against over-emphasizing the magnitude of this impact given the limitations of the original datasets. In fact, in a previous document by Parker and Gandini (2009), cited by Yaschine (2012), when analysing migrants' and non-migrants' labour force participation the authors find a greater probability of working but do not find conclusive evidence about improved wages or hours. They also find the highest probability of employment for migrant men.

Yaschine (2012) examines the first cohort of girls and boys to have spent ten years in the programme and to have reached ages 18–24 in 2008, in an effort to determine micro and macro social factors²⁶ that shape labour force participation for migrant and non-migrant youth. She uses a different classification of labour market capabilities from Rodríguez-Oreggia (2010) to explore mobility. The data analysed from the 2007 ENCEL survey reveal that 35.4 per cent of women and 79.7 per cent of men are actively working, while a further 3 per cent of both sexes combine work and study (see figure 3).²⁷ As an important corollary of this finding, 10 per cent of working women also study, whereas only 4 per cent of working males do. Moreover, Yaschine reports, those in the cohort who neither study nor work are predominantly women, 56.2 per cent of women and 13.4 per cent of men. She attributes this disparity to the skewed gender distribution of unpaid domestic work.

²⁶ See Annex II in Yaschine (2012) for detailed indicators and concepts, including those variables considered as proxying or summarizing macro factors: marginalization, migration, gender relationships, ethnicity, *Oportunidades* benefits; and micro factors: household characteristics (income, health insurance, household head age, literacy and sex, etc.), dwelling characteristics, assets and equipment, personal characteristics (age, sex, education level, school attendance, work, etc.).

²⁷ These results show, as one would expect on the basis of observed gender differences in employment, a considerable disparity between young men and women in the programme in the extent of their engagement in the world of work. What is striking, comparing these results with the comparable disparity across all workers in the country, is that the gender disparity within *Oportunidades* is greater than at the national level, where we find a female labour force participation rate of 42 per cent versus a rate of 78 per cent for men. However, for those who do work, as Yaschine shows, the contrast between hours reported by women and men is very slight: 45.5 and 47.8 hours for women and men respectively, quite different when compared to the national scenario, where rigid gender roles appear to prevent women from engaging in full-time employment.

Figure 3. Activity by age, youths 15–24 years old, in ENCEL 2007 (percentages)

Source: Yaschine, 2012.

Moreover, 14 per cent of the men reported having no occupation whereas just 6 per cent women did so. Among young people who do in fact find work, 64.7 per cent obtained their job through a member of the family.²⁸

Yaschine's work suggests that, among beneficiaries, women and migrants enjoy better working conditions (written contracts, for example) and more skilled employment than men and non-migrants, respectively (also cited by Esquivel, 2012). She notes that, while many young people follow the same line of work as their parents, many others experience upward occupational mobility. Immobility and upward occupational mobility have roughly equal magnitudes across the entire workforce. Interestingly, and perhaps counterintuitively, women, although they have greater constraints on physical relocation, are more likely to experience upward occupational mobility than men. These positive findings notwithstanding, Yaschine calls attention once again to the issue of gender discrimination that depresses both women's entry into the labour market and their compensation when they actually do work. The author confirms with statistical methods that most of the results are attributable to structural changes in the economy rather than to the *Oportunidades/Prospera* intervention. Whether these structural changes reflect broad cohort experiences as expectations about education change over time, or whether they are a consequence of spill-over effects like the ones documented by Bobonis and Finan (2009), who report significant peer effects in improving school enrolment for non-beneficiary children, is something that needs further exploration.

²⁸ This is of considerable importance for government employment policy, since these family networks are themselves characterized by tenuous and precarious connections to the labour market, as well as to jobs that offer poor remuneration and limited prospects in the geographically restricted and marginalized areas they inhabit. Precarious networks provide unlikely routes to secure and well-paying jobs.

In response to concerns about disincentives to work, Bosch, Stampini and Bedoya (2012) analyse the correlation between the expansion of *Oportunidades/Prospera* and the evolution of the labour market over the period 2000–10. These authors find no evidence of perverse effects on adult work. They conclude that programme expansion was not associated with declines in either labour force participation or formality. On the contrary, these authors emphasize that the expansion of *Oportunidades/Prospera* was strongly correlated with a transition from informal wage employment to self-employment for men (by 1.6 and 0.6 per cent of total employment in rural and urban municipalities respectively).

Some results from the evaluation of *Oportunidades/Prospera* on labour market participation are reflected in the national context. INMUJERES (2008b), using the National Occupation and Employment Survey (*Encuesta Nacional de Ocupación y Empleo, ENOE*), shows that the gender gap in labour force participation narrowed during the last decade, dropping from 45.6 percentage points in 1996, just before the start of *Progresa/Oportunidades*, to 36.8 in 2007, as women's labour force participation increased and male children's labour decreased.²⁹

Nevertheless, the closing gap in labour market participation for men and women is not a result of standard reductions in gender inequalities all over the country. The regional behaviour of the indicator reveals important differences. States with high poverty rates and indicators of social and economic marginalization lag behind the rest of the country. In Chiapas, for example, where *Oportunidades/Prospera* pays benefits to more than 50 per cent of all households, the gender gap in labour participation is near 50 percentage points. The discrepancy gives an idea of the potential that gender-sensitive policies could have, particularly policies such as public child-care and parental leave benefits (that would include both men and women as beneficiaries to better redistribute caring and other household tasks).

As a part of the monitoring of the new binding component of *Prospera*, Rubalcava (2015) reports 2,444 productive projects supported by eight federal programmes. These projects involve a total investment of \$92,629,397.90 pesos, a quite small amount compared to *Prospera's* budget. This author also reports a reinforcement of the component in 2015, achieving commitments with fifteen federal programmes (Rubalcava 2015:33)³⁰ and the creation of a pilot programme “Territorios Productivos” supporting 2,679 projects all over the country. Besides, Rubalcava compiles some other initiatives developed in 2015 with the aim to inform and train youth at high school about benefits and access to specific programmes, entrepreneurship and soft skills. None of these findings are gender specific. Neither exist documented results on employment, income or productive projects success. In fact Rubalcava affirms that the information collected is insufficient to measure the results of the binding component.

In this same regard, in order to construct a learning system for the execution of the pilot project for the binding component of *Prospera*, Berdegué et al. (2015: 38) propose eight critical processes for the operation of the component. As a result, they do not document

²⁹ Importantly, however, INMUJERES (2008b) also notes that of the 4.6 million people engaged in non-economic activities but declaring themselves to be available for work, 70 per cent are women. The policy recommendations from this document highlight the importance of expanding the supply of child-care services, extending after-school care, enacting pro-gender labour legislation, and actions to eradicate labour discrimination.

³⁰ In 2016 there was a reorganization of the programmes (Rubalcava 2016:36-38). As a result, some of them were integrated as a single one, so that a total of 13 programmes are contributing to the binding component of *Prospera*.

any specific result of the component related to income, employment, productivity or economic empowerment. Nevertheless, these authors point out the need to individualize the activities, rather than work at the household level, to promote the productive inclusion, so that they can reach women and men. Still, their monitoring and evaluation proposal is gender neutral.

But labour market participation alone is not a unique source or reflection of gender inequalities. At the national level:

1. Female contributing family workers represent 10.4 per cent of the total female labour force, vis-à-vis only 5 per cent of men. Female contributing family workers are concentrated in sectors such as commerce and restaurants (56 per cent), while 60 per cent of unpaid male workers are in agriculture.
2. The high percentage of total time devoted to unpaid household work for women, 76 per cent³¹ compared to only 21 per cent for men, results in a concentration of women in the lower range of the distribution of paid working hours. It also helps to explain why half of all working women earn less than twice the minimum wage (about US\$252), compared to only 32.2 per cent of male workers. In this context, any reduction in gender inequalities in the labour market that can be attributed to the operation of *Oportunidades* should be considered a success.

Finally, the programme's impact on time use and time burdens has been explored in a variety of different analyses, both qualitative and quantitative. Time use analysis has not yet been integrated into the evaluation criteria – despite some data on time use having been collected and the general interest in time use, particularly among feminist researchers. Moreover, in some cases the potential impact of programme participation on time use is ambiguous. It may be that the interventions reduce time burdens associated with caring for sick children and adults. Simultaneously, however, the reduction in child labour and increase in time devoted to human capital acquisition may actually redistribute reproductive and caring tasks, increasing women's time burdens.

Studies using data from the time use module included in the *Oportunidades/Prospera* evaluation data (ENCEL) from 1999 found no significant effects of *Progresa* on women's leisure time (Parker and Skoufias, 2000; Skoufias and Di Maro, 2008). One of these studies found leisure time of girls to have been reduced under *Progresa*, but found no

³¹ Merino (2010) explores this issue in depth. In a study sponsored by INMUJERES–UNIFEM, the author takes a multi-disciplinary approach to poverty and time poverty. Time poverty is defined from a gender perspective as insufficient time to do paid work (i.e. economic empowerment) and personal activities, since domestic unpaid work is what mainly hinders women from participating in many dimensions of public life. The study uses a threshold based on multiples of the median population distribution of unpaid domestic work (24.95 hours/week times 1.5 or 2) and redefines this concept on the basis of previous work by Vickery (1977), Goodin et al. (2005), Hamermesh and Lee (2005), Harvey and Mukhopadhyay (2007), Bardasi and Woodon (2009) and Antonopoulos and Memis (2010). The findings show that 62.5 per cent of women are time poor compared to 7.1 per cent of men (36.5 per cent for the total population for the threshold equivalent to the median*1.5=37.4 hours/week). This illustrates clearly that most women do not have enough time to do paid work and protect time for personal activities. Combining poverty approximations, 41.3 per cent of women are both time poor and income poor (these are the target population for *Oportunidades*). These women need income, but they do not have time to engage in paid work. This is particularly true for women with children and no access to care services, compared to 4.1 per cent of men (who do have the time to engage in paid work, but still suffer from low productivity). The labour participation rate of time-poor women is just half that of non-time-poor women, 34.2 vs. 63.3 per cent, while these numbers are 62.4 vs. 82.2 per cent, respectively, among time-poor men. Once again, the situation illustrates that gender-sensitive policies would have a huge potential to empower women. However, it is clear also that it would have to be a multi-disciplinary initiative, as it would be extremely difficult for *Oportunidades*, or any other single programme, to alter the cultural norms and dictates that underpin the rigid differences in gender roles and responsibilities.

effect for boys (Parker and Skoufias, 2000). Palermo and Braymen (2010) in their study³² use a propensity score-matching approach to develop control and treatment groups in combination with difference in differences regression analysis to analyse programme effects. These authors find mixed results of the programme's effect on gender equality from a time use perspective. Programme participation has a negative effect on women's leisure, while men's leisure time is unaffected, and the number of hours worked for both genders remains unchanged by programme participation. Interestingly, there is a negative effect on hours spent caring for children for both sexes – which may reflect their increased involvement in school and educational activities. Decreased leisure time is a cost borne solely by women. However, both leisure and time spent caring are converging among programme women and men, with time spent in the former activity becoming roughly equal as a result of programme participation.

4.5 Bargaining power and collective action

This last section explores women's bargaining power and collective action. A number of qualitative studies reinforce the notion that cash transfers given directly to women have the potential to increase their bargaining power and autonomy within the household. Programme participation may also increase recognition of the value of women's caring work and their importance in the family precisely because they are the recipients of the cash transfer and undertake the majority of the conditionalities to ensure the continued receipt of benefits. These findings highlight the contested nature of empowerment gains in the literature – since these same attributes also reinforce women's traditional roles as carers. Women's engagement in collective action through the programme, however, may increase their social capital and contribute to effects of solidarity and social inclusion that also promote women's agency.

Initial studies of women's empowerment through the programme were developed by CIESAS (1998), *Progresa* (1999), Adato (2000), Adato et al. (2000), Escobar Latapi and González de la Rocha (2002, 2005, 2009).³³ The results are confirmed in greater detail by Adato and Roopnaraine (2010a, 2010b). The findings from these evaluations should be carefully interpreted, since they report information from the early stages of the programme that were expected to change in the medium to longer term, as Adato et al. (2010b) point out in reference to the research by Rivera, Hernández and Castro (2006).

The studies from Adato and collaborators use information at the household and community level from three waves of the ENCEL, and combine these data with qualitative data from focus groups and semi-structured interviews with beneficiaries, non-beneficiaries, *promotoras* and stakeholders. These authors underscore that to understand other types of power relationships than those explored here would require further and more

³² As Palermo and Braymen (2010) point out in their study of time use impacts associated with Oportunidades/Prospera, both Skoufias and Di Maro (2008) and Parker and Skoufias (2000) studied programme effects on leisure time using ENCEL, which asked about time use for only the previous day; whereas the Mexican Family Life Survey asks about time use for a week prior to the interview. Focusing on only one day prior to the survey runs a higher risk of the reference period being atypical. Additionally, the previous studies construct leisure as a residual variable (the difference between 24 hours and all reported activities), while the study conducted by Palermo and Braymen constructs leisure time by summing reported hours spent in various leisure activities.

³³ Some later work on household bargaining positions has also been undertaken by the IDB: see Novella et al. (2012). Also, Rubalcava, Teruel and Thomas (2008) have documented bargaining empowerment for long-term investments.

in-depth research. Using the quantitative data, the studies explore women's intra-household bargaining power (control over resources such as assets, factors influencing potential measures of empowerment, mobilization of interpersonal networks and basic attitudinal attributes) and parents' preferences for children's schooling. The authors suggest that bargaining might be affected by the deliberate targeting of resources to women, and because they participate in some collective activities in the public sphere, women have to leave the household to claim their cash benefits, attend community meetings, visit health facilities and attend the *pláticas* or community talks. They explored decision-making regarding: seeking medical attention for children, telling children to go to school, giving children permission to go out, expenditures on children's clothing, food, home repairs and durable purchases, and control over women's additional income. Adato and Roopnaraine (2010a, 2010b) find that transfer amounts decrease the husband's sole decision-making in five out of eight cases. Transfers also decrease the probability that a woman lets her husband decide about the use of her additional income.

The authors also use a qualitative approach to explore any unintended effects such as increased social tensions within the household and intra-household changes in attitudes. They use different indicators to capture personal development, change in close interpersonal relationships and change through collective activities. They find that women strongly support being the recipients of the transfers because they say they know far better than men what the needs of the household are. The programme has generated increased recognition of women's role and importance in the family, as well as husbands' acceptance of women's role in the programme because of the benefits associated with participation. The most important empowerment process occurred among *promotoras* – those women charged with a pivotal role in motivating and supporting other community members' engagement in the programme.

The authors point out that women typically minimize conflict with their partners by taking care of their household responsibilities before they leave to comply with the programme activities. Potential intra-household and intra-partner conflict is also reduced by inviting men to initial meetings, so that they know what the women are doing. Furthermore, there was evidence that the *promotoras* also help to decide whether a beneficiary should or should not participate in some community activities, depending on the potential conflict she might experience at home. Adato and Roopnaraine (2010b) found little evidence of domestic violence associated with the programme. In fact, Rivera, Hernández and Castro (2006), using a representative survey, find a lower prevalence of domestic violence associated with participation in the programme. They also document more substantive freedoms for women in terms of decision-making.

About the same number of women said there was and was not a problem with the time burdens that the programme places on travelling to collect transfers, and on attending meetings and *pláticas*. Others reported that they are able to manage both programme responsibilities and domestic work. A non-trivial number of women referred to increased housework because children were now attending school, but they say this extra work was shared with other members of the family. However, in urban areas, using a qualitative approach, Escobar Latapi and González de la Rocha (2012) find that compliance with health co-responsibilities requires adult beneficiaries to reduce their work time. According to these authors, this reflects inflexibility in health service schedules. Furthermore, they observe that this problem is most severe for adult women who take children to health services, or who attend health sessions and workshops.

The qualitative analysis explored here does not appear to substantiate pronounced changes in the domain of decision-making, but women consistently report some areas in which they gain autonomy: because they no longer need to ask their husband for money when they need something, they are more confident in their ability to determine if they have sufficient money to meet the household needs, and they can now make more decisions about food expenditures. There was also evidence that women's domains of decision-making are also expanded, since they consider that programme money can be used for children's clothes or for themselves without their husband's involvement (Rodríguez Dorantes, 2005; Adato and Roopnaraine, 2010a, 2010b).

The analysis of collective action in the programme includes a variety of forms of empowerment (increased freedom of movement, greater self-confidence and "opening their minds", "knowing more") reflected in the fact that women leave the house more often, they speak to each other about problems and solutions, they have used their new knowledge to change relationships with their husbands (for example in the area of family planning) and are more comfortable speaking out in groups (Rodríguez Dorantes, 2005). A later study by Rivera, Hernández and Castro (2006) suggests possible reductions in violence attributable to the programme by increasing women's empowerment and access to cash.

Another analysis of collective action built or reinforced through the programme looks explicitly at the roles of the *vocales* in creating alternative leadership and building community social capital. Scaife Díaz (2012) concludes that the *Oportunidades/Prospera* community engagement mechanism has successfully created an alternative to traditional local leadership and has strengthened the skills, capacity and confidence of new women leaders in poor communities. The *vocales'* role as local representatives of *Oportunidades/Prospera* is critical for ensuring that beneficiaries are well-informed about the programme. Their role as a conduit in channelling community views up to the programme and providing oversight for health services, however, is less powerful, and the programme could improve training and supervision of *vocales* to mitigate the risks inherent in imparting these responsibilities to local community members. This author underscores that improving these functions will strengthen *Oportunidades/Prospera's* community engagement component and the local leadership it has created.

Finally, Adato and Roopnaraine (2010b) report that, during focus groups, women spoke about additional components that the programme could support. These women emphasized employment as a desirable complement to the programme, but not as a substitute for *Oportunidades/Prospera*. These authors suggest that the programme could increase its impact if the following interventions were integrated into its functions: adult education, productive projects, health education for men, problem-solving workshops, and the promotion of social capital.



5. Conclusions

From its inception, *Progres/Oportunidades/Prospera* recognized gender inequalities and the need for gender-related interventions as part of the array of social programmes pursued to mitigate poverty. Yet, most of these gender-related interventions have focused on breaking the inter-generational cycle of poverty, particularly for disadvantaged girl children. Although the design document of the programme emphasizes the importance of coordination with local governments to improve access and quality of education and decentralized health-care services, and with other programmes charged with providing basic social services and employment, coordination continues to be limited.

In practice, coordination has been more successful in providing access to services directly related to the programme's three components, but most of the literature reviewed here emphasizes the importance of improving the quality of both education and health services in communities where the *Prospera* programme is operating. There is very little evidence of women, either as mothers or young beneficiaries, achieving economic empowerment through employment. Despite this, there is evidence of women beneficiaries obtaining quality improvements, particularly in health services, which may be attributed to fostering more informed and engaged health consumers as part of the programme benefits. Furthermore, output and outcome indicators reflect a process of enhanced choice and agency in some dimensions, and qualitative data appear to report the appropriation of knowledge by women and enhanced autonomy as part of intra-household bargaining processes.

Coordination through *Prospera* to enable the provision of other social services that may provide alternative routes to economic empowerment for women, in particular through employment and access to child-care, have yet to be developed. The literature reviewed for this study underscores that *Prospera* has limited components or capacity for interventions that facilitate transitions from school to the labour market. This holds true for child beneficiaries, graduating from the programme and for parents of child beneficiaries and reinforces the general perception that women's engagement in the programme has been largely instrumental. The failure to deeply articulate *Prospera* with other labour market programmes or to develop labour market intermediation services is not peculiar to *Prospera*, however, and reflects a more generalized shortcoming in public policy across all institutions that engage in the delivery of social protection.

Although employment is not a unique determinant of women's economic empowerment, it is one that should not be ignored in the design of gender-sensitive policies and programmes. Yet, women's economic participation needs to be addressed together with actions to reduce time burdens and to redistribute caring responsibilities in the household – and it is in this sphere that social services can play a pivotal role. This is very much a pending agenda not only for social development but for economic policy as well. Given the large scale of *Prospera*, even more employment-related services in combination with child-care and other social services to increase women's labour market insertion could be rolled out, either as part of the programme or articulating the programme with other interventions. If such modifications continued to be undertaken, they should be made in such

a way as to provide evidence of good practices and should afford sufficient data to be able to rigorously evaluate their effectiveness.

A central concern that should inform the further pursuit of improved outcomes for women is the design of specific interventions to promote gender equality within the programme and to reduce disparities in gender roles and promote greater access to productive resources for women. The same rationale that *Progres/Oportunidades/Prospera* brought to bear on reducing gender disparities in educational achievement at its conception should be reapplied now to contemporary conditions and inform the design of innovative interventions to improve access to labour markets, and reduce those gender-related barriers that confine women disproportionately to reproductive roles within the household. Given that the programme is operating in different contexts – both urban and rural – the opportunities to expand women's substantive freedoms may differ. But these different contexts also afford different opportunities to test the efficacy of employment-related interventions, with the greatest benefits from labour market intermediation, training and capacity-building services most likely being derived in urban areas.

No matter the type of strategy adopted for the coordination of programmes and linking of policy actions, the only way to discern the progress and results attributable to these strategies is through improving the existing information systems to enhance monitoring and evaluation. Adequate baselines, comparison of control and treatment groups, randomized interventions, all provide a consistent and rigorous means of evaluating progress and contributing to the continual refinement of interventions.

Prospera is the social programme with the greatest redistributive effect, reaching the largest population in poverty. Its scale has required the implementation of detailed information systems to ensure its effective implementation, avoid political capture and manipulation, register compliance and evaluate the outcomes. Despite some shortcomings, *Prospera* has the best evaluation and information system in place. It is not surprising, therefore, that it is one of the programmes that has been widely researched and analysed both nationally and internationally, reflecting the significant interest in CCT programmes that such initiatives have engendered.

Some of these evaluations and analyses suggest the need for an updated diagnostic of the determinants of poverty and the design of new tools to tackle them. Stakeholders must consider gender aspects in this diagnostic to design more effective and egalitarian interventions, including a focus on improving decision-making and agency, and magnifying potential empowerment dimensions. In order to explore gender issues in programme evaluations, there is a need to modify both sampling instruments and research designs to add these new dimensions to the analysis. That said, there is still considerable potential to exploit the existing data to address questions of gender equality and empowerment.

The findings presented in this overview of some of the evaluations and studies of *Oportunidades/ Prospera*, and more generally some of the results of research on social policy development in Mexico, point to a number of priorities to promote greater gender equality through CCT programmes to break the inter-generational cycle of poverty. These include the gender-sensitive design of interventions that incorporate observed market failures and other obstacles to employment for women, and that promote greater social and inter-generational mobility for beneficiaries, by challenging entrenched gender roles.

CONEVAL (2012) also highlights the importance of a micro-macro approach to reducing poverty, urging the whole policy strategies to go beyond cash transfers at the micro-level to



address macroeconomic issues in efforts to provide pathways out of poverty.¹ Monetary and fiscal policies are not gender neutral and can also be designed to stimulate employment growth and curb the effect of downturns on poor households. A number of macro and meso concerns should be also considered in designing strategies to empower women. Cash transfers, poverty relief and empowerment of women have their own rationale and their own agenda, but must nonetheless be framed and pursued within a matrix of policies to sustain economic growth and increase productivity – particularly in depressed rural areas. These include mechanisms to mitigate the risk of financial crises, to address food price inflation (short run), slow economic growth and insufficient job creation (long run), and stagnant family real income.

Poor women face the most severe obstacles in gaining access to paid work, but women across the entire social and economic spectrum face enormous barriers to challenging entrenched gender roles that limit their opportunities and substantive freedoms. Beyond cash transfers, attempts to foster women's access to employment and reduce sex segmentation and discrimination in the labour force, women need access to child-care, credit, training and basic services as well as greater certainty in property relationships. Integrating and harmonizing these objectives across existing social policy and programmes will support women's greater equality in the household and in the labour market.

¹ This concern is similarly echoed in the study by Ulrichs and Roelen (2012), who argue that a disproportionate focus on human capital acquisition and a failure to address structural and macro concerns limits programme efficacy.



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