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Democracy and new ideas in Latin American social policy: the origins of conditional cash transfers in Brazil and Mexico

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ABSTRACT

Conditional cash transfers (CCTs) have become the main instrument to combat poverty in Latin America, they have been exported around the globe and are one of the most popular social policies of the twenty-first century. CCTs deliver cash transfers to poor families with conditionalities like attendance to school and health appointments. This article aims to explain the creation of CCTs. The research applies arguments from theories of social policy development to explain the formulation of the first two CCTs introduced in Brazil at the sub-national level and in Mexico at the national level during the mid-1990s. Findings show that the original formulation of CCTs can be explained by the emergence of a new policy paradigm based on a conceptualisation of the nature of poverty as lack of human capital among poor population, enabled by critical junctures created by the transitions to democratic regimes.

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Introduction

Conditional cash transfers (CCTs) have become arguably the most popular social policy of recent years. These programmes aim to combat poverty by developing the human capital of poor people. They offer targeted cash transfers to poor families, conditional on school enrolment and attendance to health appointments. More than 70 countries in every continent have implemented a CCT (World Bank 2014), but they hail originally from Latin America. Devised only two decades ago in the mid-1990s in Brazil and Mexico, they were quickly endorsed and promoted by international organisations, media outlets and governments around the world, and could represent the most influential social policy to emerge outside of the core capitalist world. Eventually CCTs ended up constituting the core of the expansion wave of social protection in Latin America, beyond the group of the traditional beneficiaries of social insurance formed by formal sector workers and their families. This article attempts to understand and explain why and how were CCTs created, by tracing the origins of the first programmes of Brazil and Mexico.

The article applies elements from theories of social policy development, as analytical tools to capture the socio-political processes that lead to the design and implementation of the first CCTs. There is an extensive literature on the causes of the expansion of CCTs across Latin America and other regions, which applies arguments from those

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theories, but the study presented here aims to explain the creation of the original programmes. Four theories commonly found in the literature are applied: industrialism, power resources, historical institutionalism and ideational analysis. These theories were elaborated from research on advanced welfare states, but their arguments been also been applied to Latin America (Dion, 2010; Garay, 2016 Huber & Stephens, 2012; Leite & Peres, 2013; Pribble, 2014). This article attempts to make a further contribution to the region's causal social policy research by testing if and how those four different theoretical perspectives apply to the cases of the original of CCTs.

The research is based on secondary literature and elite interviews with relevant policy actors. The main conclusion is that the formulation of CCTs can be explained by the adoption of a similar policy paradigm in both Brazil and Mexico, which established the lack of human capital as the cause of poverty, enabled by critical junctures created by the transitions to democratic regimes. The rest of the article is organised as follows. The next section outlines the theories of social policy development that are used in the analysis and the relevant research on their application to recent social policy expansion in Latin America; the third section describes the case studies, namely the original CCTs which are the programmes of the Federal District and the city of Campinas in Brazil and the Programme for Education, Health and Nutrition (PROGRESA) introduce in Mexico at the national level; the fourth section analyses the creation of the three CCTs in relation to relevant arguments of theories of social policy development; finally some concluding remarks are offered.

Theories of social policy development and research on Latin America

Four approaches to the study of the causal mechanisms of social policy development can be commonly found in the literature: industrialism, power-resources theory, historical institutionalism and ideational analysis (Amenta, 2003; Béland, 2010; Béland & Mahon, 2016; Dion, 2010; Esping-Andersen, 1990; Huber & Stephens, 2012; Myles & Quadagno, 2002; Olsen & O'Connor, 1998; Thelen, 2003). They were devised to explain cross-national differences among advanced welfare states, but arguments associated with them have also been applied to analyse and compare the development of specific policy areas or instruments, like family policy (Wennemo, 1998), healthcare or pensions (Béland & Hacker, 2004) and as mentioned above, they have also been applied to study social policy development in Latin America (Dion, 2010; Huber & Stephens, 2012). They can be combined to produce comprehensive explanations of changes and continuities (Béland & Hacker, 2004; Dion, 2010; Steinmo, 2008).

Industrialism explains the development of social policies in terms of structural economic and demographic factors (Béland & Mahon, 2016). Processes of industrialisation and urbanisation weakened traditional family links and families lost their potential to care for and protect individuals. Economic growth allowed governments to respond to those pressures by introducing social policies. Scholars today consider economic development a necessary but insufficient factor to account for social policy development (Dion, 2010 Esping-Andersen, 1990) because as Wilensky explained, political factors are necessary to explain differences across countries (Béland & Mahon, 2016). Nonetheless, more recently Myles and Quadango (2002) have highlighted the pressures of contemporary structural factors like globalisation, post industrialism and labour market changes.

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These are the explanations analysed in this article, since it has been argued that social policy expansion in Latin America with CCTs at their core was caused by the impact of the economic crises of the 1980s and 1990s and the neoliberal economic reforms adopted to address them. Governments responded to increases in poverty levels with the introduction of new social programmes like CCTs (Dion, 2010; Filgueira & Reygadas, 2010).

Under power-resources theory, social policies are outcome of power struggles between the capital class and organised labour in a democratic context, where labour is able to exert political influence to obtain social protection from the state. The coalitions that labour can form with social democratic political parties and other social classes are crucial to access power and fulfil its demands for progressive social protection. Differences or similarities in the features of social policies between countries are explained by the level of power resources available and exercised by coalitions of left-wing actors (Esping-Andersen, 1985; Olsen & O'Connor, 1998). In Latin America, the recent expansion wave of social protection has been explained by the increase in left power and the arrival of governments of leftist orientation enabled by transitions to democratic regimes (Filgueira & Reygadas, 2010; Huber & Stephens, 2012; Pribble, 2014). Dion (2010) on the other hand argues that informal sector workers form a new cross-class coalition that use their electoral power to obtain social protection from the state.

Historical institutionalism is applied broadly in politics and policy studies. It explains policy development in terms of the opportunities and constraints generated by the institutional context. Existing institutional arrangements create path dependencies through feedback mechanisms (Pierson, 2004). Change is enabled by critical junctures, which are moments of uncertainty that realign institutional arrangements; whilst the timing and sequencing of events determine the outcomes of critical junctures (Capoccia, 2016; Hill & Varone, 2016; Steinmo, 2008; Pierson, 2004). Different modes of policy change depend on the institutional arrangements faced by proponents of change (Hacker, 2004; Hill & Varone, 2016; Thelen, 2003). Examples of recent applications of these arguments to Latin America are Dion's (2010) characterisation of the creation of new social programmes for informal sector workers as cases of layering, given the obstacles that reformers faced to expand social protection through existing social insurance programmes, Pribble's (2014) argues that different trajectories towards universalism or segmentation were shaped by historical legacies, and Fenwick's (2015) study of the impact of different types of federal institutional arrangements on the expansion of CCTs.

Ideational analysis focuses on the role that ideas play in policymaking processes. Ideas can be defined as causal and normative beliefs of individual and collective actors shaped by their values and perceptions of social reality (Béland, 2016). Actors' actions are explained by their intentions to adjust reality to their own ideas. The concept of policy paradigm developed by Hall can be useful to apply this perspective (Béland, 2016; ; Daigneault, 2014; Hall, 1993). Hall (1993) defined a policy paradigm as the framework of ideas and standards that specify the nature of social problems, the goals of policy to address them and the policy instruments deemed necessary to achieve the goals. All public policies reflect a certain paradigm. Hall identified three modes of policy change: i) first order change when only the adjustments to policy instruments are modified but the policy itself and the policy goals remained without change, ii) second order change when adjustments and instruments change but the overarching policy goals do not, and iii) third order

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change when instruments and goals change. The latter would reflect a change in the policy paradigm caused by a new conceptualisation of the nature of social problems. Changes are the outcome of processes of social learning, defined as the deliberate attempt to modify policy goals or techniques in response to past experiences and new information. Third order change would also require exogeneous influences that alter the distribution of power resources among actors (Hall, 1993).

The diffusion of ideas at domestic and international scales is signalled as a frequent cause of policy change, through mechanisms like coercion by dominant actors, emulation and learning form others experiences or by economic competition (Meseguer & Gilardi, 2008). Weyland (2004) distinguishes between direct diffusion processes between countries and indirect diffusion where international actors like international governmental organisations or think tanks are the promoters of ideas. Peck and Theodore (2016) formulate the concept of fast policy to account for the selective and contracted flow of ideas among policymaking communities.

Leite and Peres (2013, 2015) summarise the processes of social learning that lead to the formulation of CCTs in Brazil and Mexico under a new targeted paradigm, and their direct and indirect diffusion to other countries. Sugiyama (2011) concludes that the diffusion of CCTs across Latin America was the result of the promotion of the idea by international actors and cognitive shortcuts taken by domestic policymakers under pressure from electoral competition. Peck and Theodore develop their framework from the study of the spread of CCTs around the globe, identify two different CCT models, a flexible model based on the Brazilian case and a harder neoliberal model based on the Mexican experience, and analyse their diffusion through the modes they label mimesis, modelling and mutation (Smith, 2016). Differences between the Brazilian and Mexican models are also mentioned by Leite and Peres (2013).

CCTs represent a new type of programme in Latin American because they group several characteristics not observed previously in the formulation of a social policy: i) they aim to fight poverty by investing in the human capital of the poor, especially children, ii) pay cash transfers instead of delivering services or benefits in-kind conditional, iii) demand the compliance of conditionalities, iv) emphasise strict targeting on the poor, and v) aim for a higher level of institutionalisation (Fizsbein & Schady, 2009 Franco, 2006).

The origins of CCTs in Brazil and Mexico

CCTs have become a usual element of the social policy landscape around the globe (Fizsbein & Schady, 2009; Jenson, 2010; Lavinas, 2013). Yet their origins can be found in two programmes adopted in Brazil at the sub-national level and the one introduced in Mexico at the national level almost simultaneously in the mid-1990s. Their creation is described in this section.

CCTs in Brazil

In Brazil, the first CCTs were introduced in 1995 by governments of the Federal District, which contains the capital Brasilia, and the municipality of Campinas. During those years the country was experiencing the effects of several economic crisis, but also was undergoing important processes of democratisation and political liberalisation. In Brasilia the

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programme was called *Bolsa-Escola* and was introduced in January of 1995, by the government of the leftist Workers' Party (PT) led by Governor Cristovam Buarque (Lindert, Linder, Hobbs, & De la Brière, 2007; Pinheiro do Nascimiento & Aguiar, 2006; Suplicy & Buarque, 1997). The programme targeted families with a per capita income of less than one half the minimum wage, who had children between 7 and 14 years of age, the compulsory years of public education in the country, and who had resided in the Federal District for at least five years. It offered a cash transfer of one minimum wage regardless of the number of children, paid to the family's mother, with the condition that children maintained a 90% school attendance rate. The operation was placed under the Secretary of Education. The objectives were to raise education levels of the poor by guaranteeing registration and attendance. It was complemented by *Poupança-Escola*, which deposited in a bank account one minimum wage per year for each child of beneficiary families, of which a percentage could be withdrawn after passing certain school grades (Buarque, 2013; Pinheiro do Nascimiento & Aguiar, 2006; Suplicy & Buarque, 1997).

In Campinas the programme was called Programme to Guarantee a Minimum Family Income (PGRFM), it was also introduced in January of 1995, by the government of the Party of Brazilian Social Democracy (PSDB) led by Mayor José Roberto Magalhães Teixeira (Lindert et al., 2007; Suplicy & Buarque, 1997). The programme targeted families with children up to 14 years old, with a per capita income of less than half the minimum wage, who had resided in the municipality for at least the two previous years. It paid an income supplement to raise the family's per capita income to half minimum wage. Beneficiary families had to comply with regular school attendance, health check-ups of children, participation in family planning sessions and meetings with social workers. The objective was to guarantee the intellectual formation of children to provide them with the instruments that could help them break the reproduction cycle of poverty (Fonseca & Montali, 1996; Suplicy & Buarque, 1997).

Brazil had transited from military rule to a democratic regime in 1985. The transition produced a new constitution in 1988, which allowed for significant fiscal and administrative decentralisation (Sugiyama, 2011; Fenwick, 2015). The PT, whose government created *Bolsa-Escola* in Brasilia, had been formed in 1980 when the military government authorised the formation of opposition political parties, by a broad coalition of left-wing organisations that included trade unions, religious groups identified with Liberation Theology, intellectuals and student organisations (Samuels, 2004; Roma, 2006). The PSDB, whose government introduced the PGRFM in Campinas, was created in 1989 by progressive dissidents of the centrist Party of the Brazilian Democratic Movement (PMDB), which had lead the first civilian government after the transition (Roma, 2006).

The idea of adopting cash transfers to combat poverty in Brazil date back to the 1970s (Fonseca & Montali, 1996), but the proposal of linking transfers with education emerged in 1985 from a research group created at the University of Brasilia to discuss the country's most pressing problems, directed by Cristovam Buarque, also the university's rector. The lack of education was identified as the main obstacle for development. It was stated that the first challenge was to assure that all children attended school. The problem was thought to be that poor children did not attend school because they had to work in order to contribute to their family's income. Buarque proposed to pay poor families to send their children to school (Lindert et al., 2007; Pinheiro do Nascimiento & Aguiar,

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2006). When he left the university he kept promoting his ideas; in 1990 he was invited to collaborate with the PT in the area of education[1] and in 1992 published the book 'A Revolution of Priorities', where he presented the proposal of paying one minimum wage to families with children in public schools (Buarque, 2013; Lindert et al., 2007).

One year before, in 1991, Senator Eduardo Suplicy presented an initiative in the senate to introduce universal basic income. Suplicy had been an advocate of basic income initiatives in Brazil for a long time, he promoted his legislative initiative among senators from different political parties and got their support. Although the initiative was not approved by both the Senate and the Chamber of Deputies until 2004, it is considered the turning point in discussions about cash transfers and poverty in Brazil (Leite & Peres, 2013; Lindert et al., 2007; Valencia, 2013). Buarque and Suplicy can be considered the two leaders of the agenda of cash transfers and poverty in Brazil (Leite & Peres, 2015), they would later collaborate and contribute to frame CCTs in Brazil as a step towards a universal basic income (Suplicy & Buarque, 1997).

Economist José Márcio Camargo proposed to incorporate the conditionality of school attendance to Suplicy's basic income proposal in a newspaper article published in December 1991 (Buarque, 2013; Drabik Chaves, Monteiro, & Abranches Sucupira, 2007; Lavinas & Varsano, 1997; Lindert et al., 2007; Valencia, 2013). Later in 1994, Buarque would present the idea to Teixeira, who was already Campinas' mayor. At the same time, Buarque ran for governor of Brasilia and won the elections. He incorporated the proposal of a cash transfer conditional on education in his campaign platform, with resistance from within his own party and from outside sources; nonetheless he successfully implemented it after taking office (Buarque, 2013). Positive evaluations of the Brasila and Campinas programmes facilitated the rapid spread of CCTs to other municipalities throughout Brazil, and eventually around the world (Sugiyama, 2008; Fenwick, 2015). Buarque continued promoting the idea, he proposed it to President Fernando Henrique Cardoso who belonged to the PSDB, and in 2001 the first national CCT was given the same name used in Brasilia, namely *Bolsa-Escola* (Buarque, 2013).

CCTs in Mexico

In Mexico, the first CCT was introduced at the national level in 1997 by the government of the Institutional Revolutionary Party (PRI), led by President Ernesto Zedillo (Levy, 2006; Levy & Rodríguez, 2004; Levy & Rodríguez, 2005; Sugiyama, 2011). It was called Programme for Education, Health and Nutrition (*Progresa*). It targeted poor rural population below official poverty lines, and paid cash transfers that varied according to the family's composition. The objectives of *Progresa* included to integrate and systematise education, health and nutrition actions for families in extreme poverty; contribute to the completion of basic education by avoiding that children engaged in activities that obstructed school attendance; reduce negative effects of illnesses and malnutrition on school performance; improve health conditions by providing access to information on nutrition and health; enable long-term investment projects like children's education; and promote co-responsibility and active participation of families in the improvement of health, education and nutrition conditions (Levy, 2006; Levy & Rodríguez, 2004; Levy & Rodríguez, 2005).

The bulk of the transfers were called scholarships, their amount depended on the number, sex and grade of school children. Transfers were paid to the mother and were

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conditional on school attendance of children, regular health check-ups and participation in health talks by all family members, mostly the mother. There was a basic nutrition transfers paid to all families, whilst payment of scholarships began when children reached third grade, because it was estimated that it was then that children tended to abandon school to engage in paid and domestic work. Scholarship amounts were set on the opportunity cost of children not having to work, and were higher for girls after secondary school because at that level they registered higher dropout rates. The programme also delivered nutrition supplements (Levy, 2006; Levy & Rodríguez, 2004; Levy & Rodríguez, 2005).

The PRI was the hegemonic party that had ruled Mexico since the 1920s and that had veered to the right and adopted neoliberalism in the 1980s. President Zedillo's administration began in December 1994 amidst severe economic and political crises. He would eventually become the last president of the hegemonic party regime. The economic crisis caused poverty levels to soar and was so severe that provoked a global crisis. The political crisis was caused by the Zapatista uprising of January of 1994, high-profile political assassinations and the quarrel that broke out between Zedillo and his predecessor, President Carlos Salinas, who had left office with a very negative reputation, blamed for both crises. Political and ecomic pressures would result in the openning of the political regime and the transition to a multi-party electoral system (Crespo, 2003, Rodríguez Araujo, 2010).

Progresa was proposed by Santiago Levy, Undersecretary for Revenue at the federal Secretariat for Finance and Public Credit. Levy had won the National Prize for Economic Research in 1992 for his work on poverty. He had argued that the characteristics of population in extreme poverty – which included higher fertility rates because children represented a source of economic security, strong vulnerability to wage fluctuations, higher labour market participation rates among children because they engaged in paid or domestic work to help their families, low capacity to face risk due to low nutrition status caused by drops in labour earnings, and a direct effect of their nutrition status on their productivity – created a vicious circle that obstructed the formation of the necessary human capital in children and trapped generations in poverty. To break that vicious circle poor families needed to build up their human capital and required an integrated package of health, education and nutrition services that incorporated income support. Targeting on the extreme poor was necessary because the moderate poor required other types of interventions like access to credit and job training (Levy, 1991).

Before *Progresa* the countrýs poverty reduction policy consisted of food subsidies and the provision of foodstuffs. Those measures were heavily criticised by Levy and his team for being ineffective at reducing poverty, mainly due to poor targeting (Levy, 2006; Levy & Rodríguez, 2005). The Salinas administration had also created the National Solidarity Programme (*Pronasol*), an umbrella programme that grouped a wide variety of social initiatives like. *Pronasol* was the flagship programme of President Salinas and was personally identified with him. Eventually it would be heavily discredited for being a clientelistic tool to keep the PRI and Salinas in power (DeLeon & Hernández, 2001; Dion, 2010; Sugiyama, 2011; Valencia, 2013). As Salinas' reputation worsened, one of the ways in which the new president Zedillo took distance from him was by dismantling *Pronasol* (DeLeon & Hernández, 2001).

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Levy comments that the economic crisis opened the window of opportunity to push his idea for a new approach to fight poverty (Levy, 2006 Levy & Rodríguez, 2005). *Progresa* was piloted in the state of Campeche in 1995 and 1996. Zedillo also incorporated to the formulation team officials from the National Population Council (CONAPO), federal agency in charge of population planning, who had experience in the area of poverty reduction policy. The pilot originally only considered health conditionalities (Levy, 2006; Levy & Rodríguez, 2005; Valencia, 2013). At that time a Mexican delegation visited Brazil to study the municipal CCTs[2] (Lindert et al., 2007). The conditionality of school attendance was later incorporated. The application of strict targeting mechanisms was considered necessary to assure effectiveness, since it was inadequate targeting that was blamed for the failure of previous anti-poverty programmes (Levy, 2006 Levy & Rodríguez, 2005).

Reformers faced strong opposition mostly from within the government, as politicians and officials did not agree on the dismissal of other social programmes like food subsidies. The team of reformers held a series of meetings with politicians and officials of different government sectors and political affiliations to gather support for *Progresa*, and in order to do so tried to avoid its identification with a particular political party. August of 1997 was set as the month to start the programme to avoid any electoral effects during the mid-term elections of July of that year. A special agency called National Agency for the Programme of Education, Health and Nutrition (*Conprogresa* by its acronym), independent of the Secretariat for Social Development (SEDESOL), was proposed to de-politicised the programme's administration. SEDESOL had been created a few years earlier by Salinas with the foremost task of administering *Pronasol*. The design of evaluation mechanisms to be conducted by external organisations were considered from the beginning, as reformers thought they would need reliable evidence of results to guarantee the continuity of the programme (Levy, 2006; Levy & Rodríguez, 2005; Valencia, 2013). As with the Brazilian programmes, positive evaluations contributed to the fast dissemination of CCTs around the world (Fizsbein & Schady, 2009, Sugiyama, 2011).

Why CCTs? Why Brazil and Mexico?

Arguments from different theoretical perspectives of social policy development were applied with the aim of elaborating a comprehensive explanation of the origins of CCTs. As mentioned above, out of the usual types of programmes that constitute today the international social policy landscape, CCTs could well be the only one that did not emerge from core capitalists countries. An account of their origins is relevant to complement current explanations of how new types of social policicies can emerge outside the capitalist core, under current socio-political contexts.

Industrialism

In Latin America, the introduction and expansion of targeted social programmes like CCTs has been strongly linked to recent economic changes. From the first decades of the twentieth century, social policy in the region was based on social insurance programmes of limited coverage to urban formal sector workers and their families, especially industrial and public sector workers, which formed the streategic groups of insiders for

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development of the import-substitution industrialisation economic strategy. The wabe of social policy expansion hat began in the 1990s with CCTs targeted groups of outsiders not benefited by social insurance, like poor rural families and families of poor urban informal sector workers. A common argument found in the literature is that the expansion has responded to the rise in the number of poor and informal sector workers provoked by the economic crises of the 1980s and 1990s, the dismissal of the ISI strategy and the adoption of neoliberal economic reforms (Barrientos, 2009; Dion, 2010; Jenson, 2010; Lavinas, 2013).

Data from the Economic Commission for Latin America and the Caribbean (ECLAC) on poverty and informality shows that in all the region the poverty rate increased from 40.5 percent in 1980 to 48.4 in 1990, but at the time of the creation of CCTs in the mid-1990s it had fallen slightly to 45.8 percent. In Brazil the drop in the first half of the 1990s was steeper, from 48 percent in 1990 to 35.8 percent in 1996, while the extreme poverty rate fell even more, from 23.9 percent in the former year to 15.5 percent in the latter; those indicators have continued to decline since then. Mexico does register an increase in both indicators, from a poverty rate of 47.7 percent in 1989 to 52.9 in 1996, and an extreme poverty rate of 18.7 percent in 1989 to 22 percent in 1996. Regarding informality, for the entire Latin America, ECLAC reports that the proportion of workers employed in the informal sector in 1990 was 43.4 and in 1997 46.4 percent; in Brazil the proportion passed from 42.7 percent in 1992 to 43.6 percent in 1998, and in Mexico from 44.2 percent in 1993 to 45.7 percent in 1996 (ECLAC, 2018).

ECLAC's data shows that in Latin America as a whole poverty increased during the 1980s but began to fall in the 1990s. Brazil followed that trend, whilst in Mexico poverty did increase due to the 1995 economic crisis. The size of the informal sector grew in the entire region during the 1990s, but in Brazil and Mexico only in close to one percentage point. In any case, poverty and informality were already extremely high before the economic crises and the reforms, and had been so throughout the countries' histories. If informality is measured as the proportion of the population not covered by social insurance, in both Brazil and Mexico it hardly fell below 50 percent in the twentieth century (Filgueira, 2005).

Hence an explanation that placed the causes of social policy expansion solely on economic changes and their consequences is difficult to support. It would not answer the question of why previous governments that also faced high poverty and informality rates did not enact significant reforms to offer social protection to groups of the population affected by those problems. Even more, the question of why CCTs were devised as the instrument to fight poverty also remains unanswered. As mentioned above, Wilensky pointed out that the analysis of politics was necessary to explain the causes of the development of social policies (Béland & Mahon, 2016).

Power-resources theory

In the twenty-first century many governments in Latin America left, enabled by democratic transitions. It has been argued the left turns are the main cause of the expansion of social protection (Filgueira & Reygadas, 2010; Huber & Stephens, 2012). The creation of CCTs in Brazil could prove this argument, since in both Brasilia and Campinas the programmes were introduced by politicians from political parties that could be identified with

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the left, as well as many other social and economic reforms across the region. In Mexico, however, this has not been the case, as the country was never governed by a leftist party, yet underwent similar processes of social policy expansion through CCTs.

Progresa was introduced by the centre-right PRI government closely linked to neoliberalism. In fact, as Fairfield and Garay (2017) point out, in Latin America social policy expansion has also taken place under right-wing governments. Garay (2016) argues that it has been electoral competition and social mobilisation demanding better living conditions which explain social policy expansion. Applying power-resources theory, Dion (2010) also suggested that competitive elections were behind the recent expansion of social protection to sectors not covered by social insurance. In the specific case of CCTs, and Sugiyama (2011) demonstrated that the search for electoral gains prompted the diffusion of CCTs across the region. Pressures from social mobilisation by progressive groups under conditions of electoral competition, even on right-wing governments, could prove the core argument of power-resources theory of the relevance of leftist actors for social protection expansion. Still, in the cases of the first CCTs, electoral gains do not seem to have been the motivation behind the main actors' decisions.

As a former high-ranking public official from Brazil explained, CCTs in that country were the outcome of processes of collaboration, not competition.[3] Suplicy and Buarque (1997) explicitly write that initiative of CCTs did not belong to the PT or any political party exclusively. Buarque promoted the idea with politicians from different parties and in fact it was a mayor from the PSDB who introduced it at the same time in Campinas. He also pushed his idea with President Cardoso, who eventually introduced it at the national level with the same name that Buarque had used in Brasilia. In Mexico, besides meetings with diverse groups of political actors, the implementation of Progresa was even delayed until after the mid-term term elections of to avoid political effects.

Groups of reformers in both countries seem to have made an effort to avoid the identification of their initiatives with a particular political party. This is not to argue that left-wing actors or electoral gains have not had a strong influence on the expansion of social policies during the last decades. Even in Mexico, non-contributory pensions were first introduced by the leftist government of the Federal District (Mexico City) (Granados, 2014). As argued by several authors, electoral competition could explain the diffusion of CCTs accross the region, but given the explicit intentions of reformers in both Brazil and Mexico to avoid political effects, it would not seem to explain the formulation of the original programmes.

Historical institutionalism

Dion (2010) argues that processes of democratisation and political liberalisation triggered the transformation of Latin America's social policy systems in the last decades of the twentieth century, and that new social programmes were layered along the existing social insurance programmes due to the inadequacy of expanding social protection through them. As explained above, several authors have considered electoral competition a strong factor in the expansion of social policy, yet in the cases of the first CCTs electoral gains do not seem to be the motivation of their creators. Nonetheless, democracy can have an effect on social policy through diverse mechanisms, no only electoral competition (Kaufman & Nelson, 2004).

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Processes of democratisation can be pointed out as the critical junctures that enabled a change in the path followed previously in both country's social policy by the creation of CCTs. Exogenous factors broke with the long-term equilibrium of policy development and opened the opportunities for change. In Brazil, the effects of institutional changes are more straightforward than in Mexico. Fenwick (2009) shows how the new institutional arrangements between different levels of government that emerged from the democratic transition of 1985 permitted the expansion of social policy through CCTs by local governments. After the transition, a new Constitution was drafted in 1988 and extensive degrees of fiscal and political decentralisation were introduced. For the first time municipal autonomy was officially recognised in the country's history. Increases in revenue transfers from the federal government allowed sub-national governments to formulate and implement their own social programmes. However, the mere fact that politicians from the PT and the PSDB reached positions of power was the outcome of the democratic transition. Under the previous authoritarian regime, the arrival to decision-making positions of the actors that formulated the CCTs in Brasilia and Campinas would not have been possible.

In Mexico, processes of democratisation also enabled the reform of social policy and the change in the logic of the anti-poverty policy of the federal government. Mexican reformers were critical of the existing social insurance system for not benefiting the poorest sectors of the population and pointed out that a new instrument was required to offer social protection to them (Levy & Rodríguez, 2005). Large scale social assistance programmes like *Pronasol* that targeted the poor had existed before, but they had been temporary and highly clientelistic (Barba, 2006). In fact, *Pronasol* was based on the experience of programmes that date back to the 1970s (Dion, 2010). The authoritarian regime of the PRI had used those programmes to enable its reproduction through clientelistic practices.

The definitive step towards the democratic transition in Mexico was taken during the Zedillo administration, when the organisation of elections was placed under a citizens' council. The PRI lost the majority in the Chamber of Deputies in 1997 and the presidency in 2000. From the beginning of his administration, Zedillo was under great pressure to introduce democratic reforms due to the risk of social instability caused by the economic and political crises that the country was experiencing (Crespo, 2004, Rodríguez Araujo, 2010). The continuity of the PRI in power was no longer a priority for the government and anti-poverty policy did not have to serve clientelistic purposes anymore. A new independent government agency, *Conprogresa*, was even proposed to de-politicise poverty reduction policy. Zedillo also had the urgency of distancing his government from the former Salinas government, which had ended in discredit, to mark the transition towards a more 'normal' democratic regime. Changes in the logic of the country's political institutions opened the window of opportunity for social policy reform. Clientelist *Pronasol* was dismantled and the more transparent and institutionalised *Progresa* was created.

Democratic transitions explain why a new course was taken in anti-poverty policy in both countries. New institutional arrangements created by exogeneous factors opened the space for the introduction of new ideas in the area of anti-poverty policy. However, different modes of social programmes could have been adopted to expand social protection; democracy may explain why change occurred but not why the precise model of CCTs was formulated and chosen as the route for the expansion. As has been noted, historical institutionalism may explain change but not the content change. Hence, it can be

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complemented with ideational analysis to achieve comprehensive explanations of policy development (Béland, 2016; Steinmo, 2008).

Ideational analysis

CCTs represent a new social policy paradigm. As defined by Hall, a policy paradigm is formed by ideas that political actors hold on the causes of a social problem, the goals that policy should pursue to solve them and the instruments required to achieve those goals (Hall, 1993). In both Brazil and Mexico, reformers developed a similar conceptualisation of the nature of poverty, based on the low levels of human capital of poor families due to education and health deficiencies. Policy goals and instruments parted from that starting point, the goal being to endow poor families with the necessary human capital so that they could overcome their condition of poverty through their own effort. Children were considered the priority. It was assumed that one of the main causes of poverty was that the lacked adequate education levels. Poor children abandoned school, had lower attendance rates and performance levels due to their need to engage in paid or unpaid work. They worked not because they wanted to, but to help their families. Hence, poor families had more children because they represented a source of economic security, which worsened their condition of poverty. Child labour was considered one of the major obstacles to the countries' development and had to be tackled.[4] Health and nutrition deficiencies were also identified as causes of the lack of human capital of poor children. In sum, public policy should pursue the goal of raising the human capital of poor families, especially children, so that in the future they could have the capacity of lifting themselves out of poverty.

What was required was an integrated approach that linked education, health and income support. Links with health services were important, especially to provide the necessary information to reduce fertility rates among poor women, guarantee the quality of the products that would be consumed with the additional income and improve children's health conditions. Hence, the instrument to reach policy goals was a programme of cash transfers targeted on the poor with compulsory conditions. Cash transfers were not meant to be assumed as additional income to improve a family's situation, but as compensation for the opportunity cost of not sending children to work. The legal prohibition of child labour was deemed insufficient to eliminate it. Conditionalities were necessary to assure that families sent their children to school and not simply take the programme as an additional income source (Pinheiro do Nascimiento & Aguiar, 2006 Suplicy & Buarque, 1997).

This new paradigm was the outcome of processes of social learning (Leite & Peres, 2013). Accounts reveal that the original proposal of CCTs emerged from the University of Brasilia in the mid-1980s. From there, the exchange of ideas among several actors – the ones mentioned in this article like Buarque, Suplicy, Camargo and Teixeira, but also others – resulted in the formulation of the programmes that were implemented in Brasilia and Campinas. In Mexico, the idea of providing income support to the poor instead of benefits in-kind, tied to health and education initiatives was developed by Levy. The accumulation of anomalies in anti-poverty policy in the two countries that lead all these actors to look for new ideas. Decades of failures in the area resulted in the development of the new paradigm. Exchange of ideas in a process of direct diffusion (Weyland,

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2004) between Brazilian and Mexican reformers without the involvement of third parties was also key to the formulation of the programmes. The Mexican pilot programme did not include the conditionality of school attendance, which were only introduced into the final design of *Progresa* after the interaction with the Brazilian municipal CCTs.

The process of social learning in Brazil kept on and yielded the introduction of the first national CCT in 2001 and a couple of years later of the programme *Bolsa Família*, which is the national CCT that exists today. Eventually, two different CCT models would emerge (Leite & Peres, 2013; Peck & Theodore, 2016). A flexible model in Brazil, where CCTs are considered a social right and the non-compliment with conditionalities triggers a visit to the family, and the Mexican model, with a stronger emphasis on targeting and conditionalities, which if not complied with, can result in the suspension of transfers. Nonetheless, the origins of both models lie in the formulation of a new social policy paradigm in both countries between the mid-1980s and the mid-1990s.

Conclusions

CCTs represent one of the most influential social policies of recent decades. This article tested different theoretical perspectives of social policy development with the aim of providing a comprehensive account of their origins in Brazil and Mexico in the mid-1990s. The main argument is that the creation of CCTs represents the emergence a new policy paradigm, enabled by critical junctures created by the transitions to democratic regimes. As Hall (1993) explains, this type of change depends on the positional advantages of relevant actors and their resources and the exogeneous factors that shape their level of power, it is likely to be preceded by shifts in the locus of authority, and is generated by the accumulation of anomalies or the appearance of new information. In the cases analysed in this article, new ideas on the causes and solutions of poverty penetrated state structures when their proponents reached decision-making positions and were able to implement their ideas due to the democratic transitions. Accumulation of anomalies in anti-poverty policy prompted the new approach, since previous ones were perceived to have failed. The exchange of ideas between actors was key to the formation of the new paradigm.

The new paradigm was based on a similar conceptualisation of the causes of poverty based on the lack of human capital of poor families. That conceptualisation lead to the adoption of similar policy goals, namely to raise the human capital of poor families, especially children, by keeping them in school and deterring child labour, as well as to improve their health and nutrition; and eventually to similar policy instruments which consisted on cash transfers conditional on school attendance, as well as attendance to health check-ups and related activities. These findings prove that when ideas find a fertile political context, significant policy changes can be triggered.

One question that remains is whether CCTs hold the potential of producing significant and lasting reductions in poverty. The latest research may suggest they do not (Barrientos & Villa, 2016; Lavinas & Simoes, 2015; Martínez Franzoni & Sánchez-Ancochea, 2014; Papadopoulos & Velázquez Leyer, 2016). Although in most cases school enrolment rates have increased, child labour has fallen and many other social indicators have improved (Fizsbein & Schady, 2009), reductions in poverty seem to require additional economic, social and poitical reforms. Mexican reformers commented that the success

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in the fight against poverty would eventually depend on the adoption of additional measures (Levy & Rodríguez, 2005). CCTs do represent a significant progress and through them today, millions of families around the globe receive transfers and services from their governments that otherwise would not be receiving; but further research should focus on how to increase their potential to address poverty, on the additional social and economic policies needed for significant poverty reductions and on the socio-political mechanisms that can trigger and shape those changes necessary to enhance and complement the impact of public policy on poverty and inequality.

Notes

1. Interview with Senator Cristovam Buarque, Governor of the Federal District between 1995 and 1998, June 7th 2018.
2. Interview with Senator Cristovam Buarque, Governor of the Federal District between 1995 and 1998, June 7th 2018.
3. Interview with Dr Romulo Paes de Sousa, Deputy Minister of Social Development and Fight against Hunger between 2009 and 2012, April 26th 2018.
4. Interview with Senator Cristovam Buarque, Governor of the Federal District between 1995 and 1998, June 7th 2018.

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