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Effect of Conditional Cash Transfer Programs When the Head of the Household Is Female in Mexico

By Rubio-Sanchez, Yaura Yong ^{1*}, Rodríguez-Juárez, Eduardo ², and Polo Jiménez, Sergio Demetrio ³

Abstract

The objective of this article is to examine the impact of the OPORTUNIDADES-PROSPERA conditional cash transfer program on women heads of household in Mexico. The target of the empowerment of women household heads in the program is predominantly focused on developing human capital, shown by the increase of children in the school by the women household heads. The database was based on the data gathered through the Survey unique questionnaire of socio-economic information (CUIS) realized by the Social Development Secretariat (SEDESOL), through the PROSPERA National Coordination, which operate the OPORTUNIDADES-PROSPERA Program. The database that was analyzed consisted of 3,762 families that profited between 2004 and 2017 and settled in the 32 states of the Mexican Republic. We drew on Amartya Sen's capabilities theory and Martha Nussbaum's later contribution to this theory, to analyse the data which focused on the capacities necessary for women to achieve the desired well-being and overcome the condition of inherited poverty. A methodology with a quantitative-descriptive approach is used through two comparisons. The first focus is on the beneficiary households of the OPORTUNIDADES-PROSPERA program, and the second focus is on the total income of the beneficiary families of the program. This method allows the researcher to have a subjective view of the studied phenomenon and to understand the social world associated with that program. After conducting this study, we concluded that most of the households that entered the program have changed the composition of the head of household. This is because the new access to income transfer has provided some benefits to these women in terms of empowerment. The results show us that the conditional cash transfer programs in households headed by women are not always enough to overcome initial poverty. Also, governments have not been able to combat poverty that affects households headed by women.

Keywords: Conditional cash transfer, gender, poverty, women head household, Mexico.

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Introduction

The goal of the conditional cash transfer programs is to eradicate generational poverty and generate competitive human capital in the poorest families (Bergmann & Tafolar, 2014). Conditional cash transfer programs have been implemented in various countries around the globe, and their objective is to achieve human development. This type of program has been carried out in 52 countries, of which 17 are located in Latin America (Mariano, 2020). In Latin America, those implemented in Brazil and Mexico stand out. Brazil stands out for having the most successful conditional cash transfer program in the world called Bolsa Familia. In Mexico, the OPORTUNIDADES-PROSPERA Program was one of the first conditional cash transfer programs in Latin America.

Throughout history, the Mexican government has sought different ways to combat poverty, which is why it implemented different social policies to achieve it. But it wasn't until the 1970s that these efforts were more palpable. And although they mainly focused on strengthening human capital through access to education, they did not have a multidimensional vision of poverty. Realizing this lack of multidimensionality in the programs that were being implemented, the Mexican government decided to act and create a program that would encompass this vision of poverty. In 1997, the Education, Health and Food program was implemented in Mexico, which is known by its acronym in Spanish, PROGRESA.

PROGRESA not only focuses on education, like the previous programs, but also includes nutrition and health since its goal is to develop the human capital of the most vulnerable families on these three elements. The stipend is given directly to the mother of the family, regardless of who is the head of the household. The money transfers are bi-monthly and under the condition that they send their children to school, attend routine health check-ups, and receive workshops on preventive health care. In 2001, it changed its name to OPORTUNIDADES, which was maintained until 2014, where it was changed to PROSPERA. In 2004, the name was changed because the program was added to the linkage of the families who benefitted from it. So, they did not depend only on the subsidy received, it was feasible to increase their income, and more families could be able to exceed the poverty thresholds in which they were.

In this article, a thorough analysis will be conducted to understand the OPORTUNIDADES-PROSPERA Program. The families will be analysed, since they joined the program, and until the last recorded follow-up, these households are distributed in all the states of the Mexican Republic. The 2030 millennium goals have made it relevant to study the gender perspective of households to find out if a great stipend is necessary for families headed by female heads of household (Nations, 2018). Because this program does not focus exclusively on female heads of the household, the purpose of this work is to find out if the households benefitted by the OPORTUNIDADES-PROSPERA Program have had an impact on the heads of household and if it has positively affected the income of benefitted families. Our hypothesis is that households benefiting from a monetary resource transfer program will be impacted when it come to the sex of the head of household. Taking into consideration these hypotheses: H1: the households benefitted by a cash transfer program will have an impact on the sex of who heads them, H2: the households headed by women are located in the most marginalized strata of poverty, and H3: the households headed by women overcome initial poverty and achieve well-being when they are supported by conditional cash transfer programs.

The first section of this article will focus on the theoretical analysis of poverty and its effects on women. In the second section, we will focus on the method used to do the analysis. The third section presents the results, and I contrast them with the hypotheses raised. The fourth section is the conclusion that will be drawn from the previous sections.

Review of previous literature

The phenomenon of poverty is a complex problem that affects every country in the world, to varying degrees. Mexico is not an exception because of its search to implement actions that will help fight poverty and after the economic crisis of 1982, which affected Latin America. Mexico's government had to rethink its economic policy that focused on import substitution industrialization (ISI), and it has fully entered Neoliberalism now. International organizations helped Mexico make a faster transition. It retook the 3 pillars of neoliberalism: trade liberalization, financial deregulation, and privatization.

Neoliberalism arose in the post-war period and was originated from the thinking of the authors' Herbert Spencer, Jacques Rueff, and Friedrich A. Hayek. The latter was the chief promoter of the Neoliberal model that took up the principles of liberalism towards an exchange of goods in a free market, which would cause the development of (Hayek, 1945). According to the studies of Novelo (2004) in Latin America, structural reforms and the free market have only exacerbated capitalist relations of production, which has resulted in an increase in poverty and the marginalization of the social strata with less income.

Understanding what poverty is, it is necessary to remember the most prominent concepts, among them is that of Sen (1999), who defines poverty as the deprivation of the fundamental freedoms that the individual needs plenty develop. This concept outlines the thoughts of poverty from a multidimensional point of view, since Sen considers lack of income to be only part of the problem of satisfying the basic needs of individuals. Alkire & Foster (2011) were the first researchers to have an approach to a multidimensional measurement of poverty. They took up the ideas of Amartya Sen and made them concrete by developing a multidimensional measurement of poverty. In this work by Alkire and Foster, they mathematically show how the multidimensional poverty measurement is better than the traditional one-dimensional measurement of poverty through income.

Focusing on poverty as a multidimensional problem, G. Sen (1998) asserted that poverty cannot be seen only through an individual but must be analyzed from a family point of view, since the different roles of individuals within the family could support the situation of poverty. Also, the study of Benería & Sen (2014) made a feminist analysis of third world households and realized that it is impossible to ignore what happens within the households of families in poverty since there is an intertwining of relationships such as gender and class. Returning to the vision of gender poverty was Nussbaum (1992), who took up Amartya Sen's theory of capacities developed in 1979, and gave it a gender approach since she argues that women have capacities inferior to those of men. Nussbaum argued for the need for governments to implement actions aimed at minimum respect for the human dignity of women. She provides ten central functional human capacities to achieve the much-desired equality of capacities between men and women. Butler (2015) argues that there are no sexual roles or gender roles, significantly or biologically inscribed in human nature, each role is assigned by the culture or the environment where the individual develops. Regarding the heads of households, Rallu (2017) says that women heads of households, alone with children, are the households that tend to fall into the most marginalized quartiles. Female-headed households have fewer educational, health, and employment opportunities for themselves and their children.

Methods

The empirical study is based on the single socioeconomic information questionnaire (CUIS), which is the instrument that the Social Development Secretariat (SEDESOL)—which is to operate the OPORTUNIDADES-PROSPERA Program— uses to collect information from households both to incorporate them into the program and to monitor their beneficiaries.

In 2004, 3,762 beneficiaries of the OPORTUNIDADES-PROSPERA program were incorporated and were followed up in 2007, 2011, and 2017. Four stages were proposed to address the study of the problem: 1) Compilation of the database, 2) Delimitation of the beneficiaries to study 3) Analysis of the information and getting results, and 4) Interpretation of results and conclusions.

1) Compilation of the database: The necessary steps were taken with SEDESOL so that through the PROSPERA National Coordination it will provide the newest database of the beneficiaries of the OPORTUNIDADES-PROSPERA Program for the period 2004-2018.

2) Delimitation of the beneficiaries to study: Due to the magnitude of the database provided, and because the follow-ups are not carried out with specific periodicity, it was determined to use those incorporated in 2004, and they would have had their follow-up in the same years. Besides, these families were distributed in all the states of the Mexican Republic, which gave us the 3,762 beneficiary households analyzed.

3) Analysis of information and obtaining results: A quantitative-descriptive analysis of the characteristics of the beneficiary families was carried out, which focused more on studying the head of the household through their gender and the total income of the families, comparing them with the poverty lines of the years of study.

4) Interpretation of results and conclusions: the analysis of the information was contrasted with the previously exposed literature review to be able to interpret the results. The general conclusion of the study of poverty included the benefit of the conditional cash transfer programs, and the particular results obtained from the OPORTUNIDADES-PROSPERA program.

Results

Study of the OPORTUNIDADES-PROSPERA Program

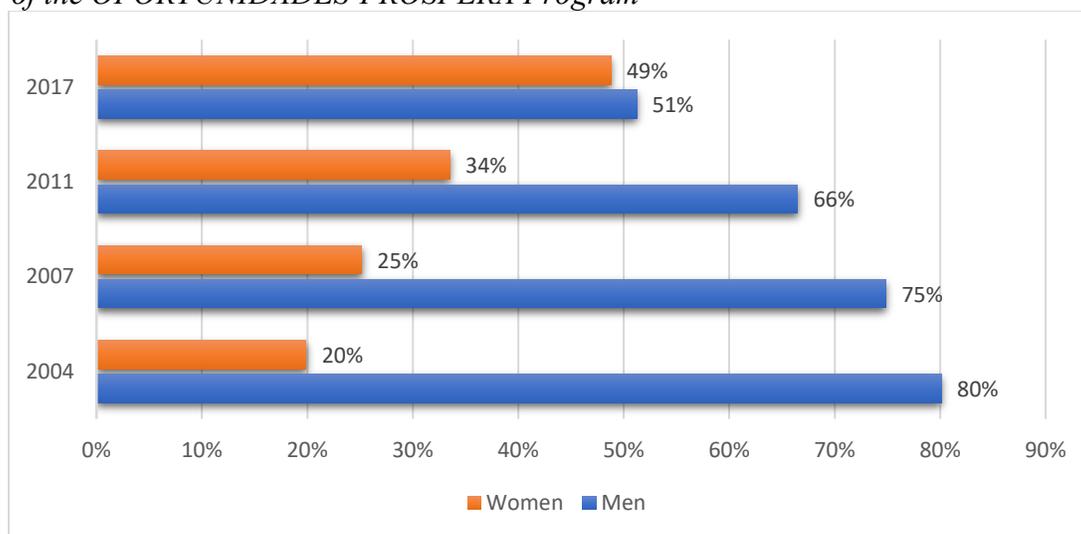


Figure 1: Gender of the head of household by year.

Source: Own elaboration.

Figure 1 shows that 3,762 families started in households headed by women with a proportion in 2004 of 20%, 2007 25%, 2011 34% and 2017 49%; while the proportion of men was 2004 80%, 2007 75%, 2011 66% and 2017 51%. In other words, the difference in households headed by men decreased over time since it began with a difference in 2004 of 60%, 2007 50%, 2011 32% and 2017 only 2%. This data is relevant because it means that 58% of the families that joined the OPORTUNIDADES-PROSPERA Program were headed by a male, but by 2017 these households were already headed by a woman. Therefore, the H1 hypothesis is confirmed that households benefiting from a program of monetary transfer of resources will have an impact on the sex of who heads them. This supports the studies carried out by Asmorowati et al., (2019), Amanasio & Velérie (2010), Adato, de la Briere, Mindek & Quisumbing (2000) which argue that stipends give this benefit to women and empower them since they take control of the resources, so there are changes in the behavior of the observed households.

Total household income

Table 1: Stratification according to monthly household income.

Stratum	Income per household (Mexican pesos)	Year	Denomination by income
I	0 - 472.07	2004	Extreme poverty
	0 - 570.83	2007	
	0 - 712.77	2011	
	0 - 979.31	2017	
II	472.08 - 972.68	2004	Poverty
	570.84 - 1,132.23	2007	
	712.78 - 1,378.05	2011	
	979.32 - 1,784.93	2017	
III	> 972.68	2004	Not poor
	> 1,132.23	2007	
	> 1,378.05	2011	
	> 1,784.93	2017	

Source: Own elaboration with information Coneval (2019).

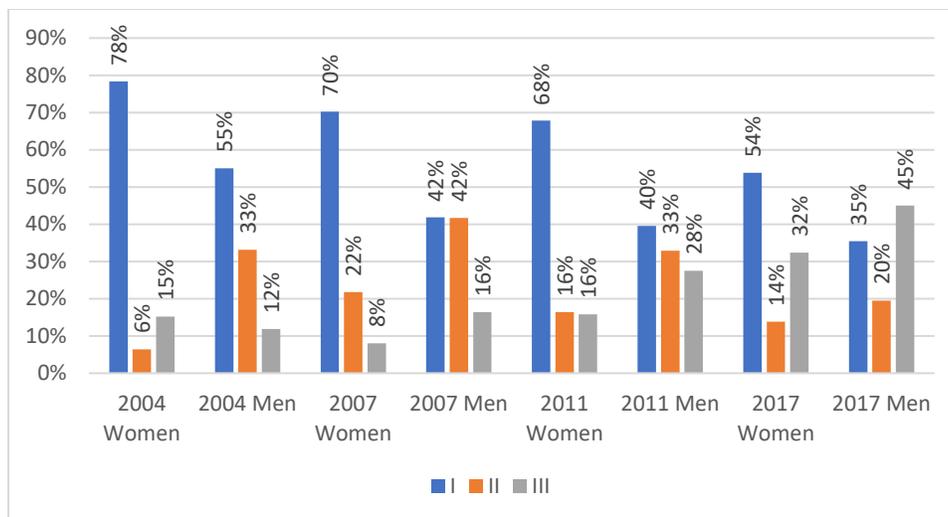


Figure 2. Household income by stratum and sex

Source: Own elaboration.

According to Figure 2, when the households headed by women joined the OPORTUNIDADES-PROSPERA program in 2004, 78% were in the first stratum (Table 1). For 2007 it decreased by 8%, 2011 by 10%, and in 2017 only 24% compared to the year of incorporation. On the other hand, households headed by men represented in the first stratum (Table 1) began in 2004 with 55%, decreasing by 13% in 2007, 15% in 2011, and 20% for 2017 compared to the first year. Stratum II (Table 1) for female headship began in 2004 with 6%, 2007 increased by 16%, 2011 with 10%, and 2017 with 8% compared to the initial year. Concerning male headship in 2004, it was 33%, 2007 increased by 9%, 2011 remained at the same percentage as 2004, 2017 decreased by 13% compared to 2004. And stratum III (Table 1) for female heads of the household started in 2004 with 15%, 2007 decreased by 7%, 2011 increased by 1%, and 2017 increased by 17%. On the other hand, the head of the male household in 2004 had 12%, 2007 increased to 9%, 2011 increased 16%, and 2017 increased by 33%. Therefore, H2 is confirmed: households headed by women are located in the most marginalized strata of poverty. In addition to supporting the research by Rosenhouse, (1989), Buvinic, (1990), Buvinić & Rao Gupta, (1997), Chant, (1997), and Rallu (2017) where they refer to the vulnerability of households headed by women, this also supports that this condition makes them so that they are conditions of greater poverty than the households headed by men.

Income of families that changed the sex of the head of the family from male to female

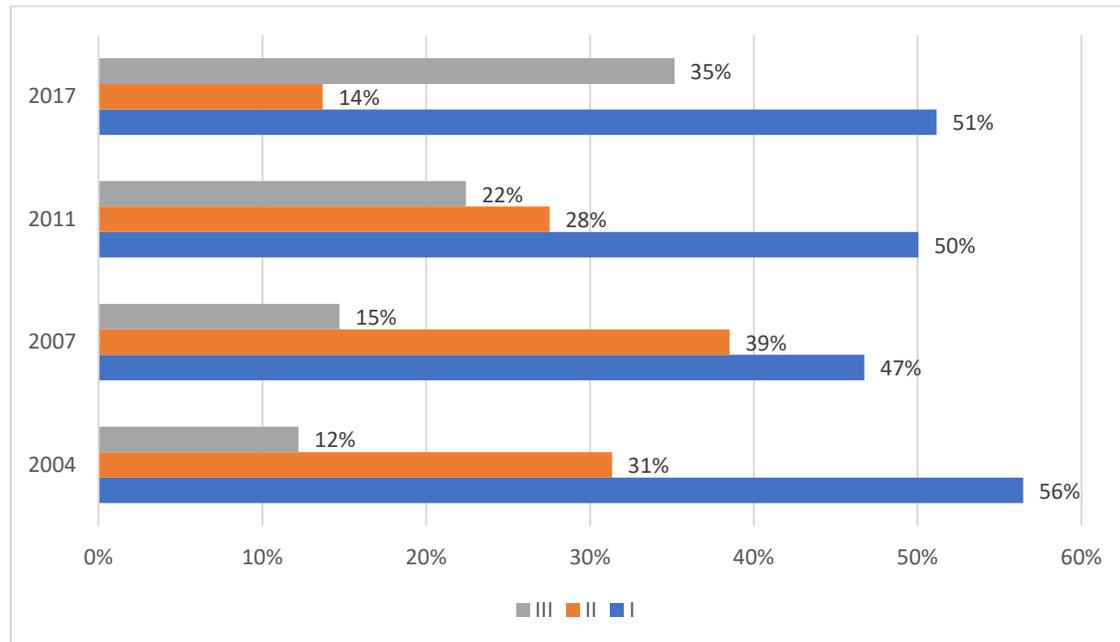


Figure 3. *Income by stratum of households that changed the sex of their head of household from male to female*

Source: Own elaboration.

Figure 3 represented 58% of families that changed their head household (men-women). It is observed in Figure 3 that the first stratum begins in 2004 with 56%, 2007 decreased by 9%, 2011 decreased by 6%, and 2017 decreased by 5% compared to the first year. Stratum II started at 31%, increased by 8% in 2007, decreased by 3% for 2011, and in 2017 decreased by 17%. And in stratum III in 2004 it had 12%, 2007 increased by 3%, 2011 increased by 10%, and 2017 increased by 23%. With these numbers it is identified that the households that started in stratum I and II, 23% went to stratum III, which means that they surpassed the initial poverty of income that they found when joining the program, being headed by men.

Although 23% is a good number, it is not enough to accept the H3 hypothesis. So, the H3 hypothesis is rejected which states that female-headed households overcome initial poverty and achieve well-being if they are supported by conditional cash transfer programs. This hypothesis rejection is affirmed in the studies carried out by Nwosu & Ndinda, (2018), Haman (2019), Mariano (2019) and Chant (2016) which determined that the stipend of conditional cash transfer programs is not enough to get out of the initial poverty state. These families do not have actions aimed at the needs of women because this type of program is more focused on the development of the human capital of children.

Conclusion

Conditional cash transfer programs are the result of the struggle of neoliberalism to carry out social policies, which are landed by social programs to try to stop the impoverishment generated by the economic policies of neoliberalism. Mexico, being in this type of approach, was one of the pioneers in the development of monetary transfer programs of resources. It has also

joined the ideas of female empowerment, and this study shows that although these programs are a great contribution for households in poverty, they are not the answer to meet the needs of women. This is because they are focused on the human capital of the children of these households and have not developed the women or men heads of the family who head these households.

This research illustrated that improving the income conditions of the families and ensuring resources are managed by women has allowed changes in the composition of the families, since men's contributions are unnecessary for household support. But this research also indicated that changing the gender of households benefiting from this program from male to female does not generate the conditions for these households to overcome initial poverty.

These programs are a great contribution to ease poverty since it is difficult without this aid. It is possible to achieve the capacities of the individual that Amartya Sen argued for in 1979 and that he completed with integrating the family in 1998. Martha Nussbaum supplemented this theory in 1992, incorporating the capabilities of women. In the present-day, these capabilities have not been fully developed. As determined in the research, since it showed that although women are heads of household and receive the resources of the program, it does not need to be reflected in the overcoming of initial poverty since this did not happen in most cases.

The government of Mexico still has a long way to go to guarantee the access of human capital to the same conditions, regardless of whether its origin is poor or not. The government must also ensure that Mexican households, especially those headed by women, have the necessary tools to overcome their condition of poverty.

To summarize, there is not an entirely positive effect in households headed by women because this only impacts the composition of the household and does not result in the overcoming of initial poverty. The results show many times that when the family is headed by a woman, it is condemned to the poorest stratum.

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