

**Conditional Opportunities:
Conceptual Disparities and Practical
Shortcomings of Conditional Cash Transfer
Programs in Chiapas, Mexico**

**by
Alexis Carr**

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Approval

Name: Alexis Carr

Degree: Master of Arts (International Studies)

Title of Thesis: *Conditional Opportunities: Conceptual Disparities and Practical Shortcomings of Conditional Cash Transfer Programs in Chiapas, Mexico*

Supervisory Committee: **Chair:** Morten Jerven
Associate Professor

Alexander Dawson
Senior Supervisor
Professor

Christopher Gibson
Supervisor
Assistant Professor

Date Approved: December 11, 2013

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Abstract

Aimed at building human capital and alleviating poverty, Mexico's Conditional Cash Transfer (CCT) program Oportunidades has been hailed a success with proponents citing a large body of statistical evidence as support for program. However, far less information is available on the quotidian experiences of the program from the point of view of beneficiaries and those involved in administering the program and its related services. By looking into the personal experiences and life histories of beneficiaries and workers, we can gain insight into important issues that do not always arise in the statistical data or surveys that only directly address the program. For this project interviews with program recipients as well as official and non-official program employees were conducted in Comitán, Chiapas, Mexico. This major project suggests that the formal rhetoric utilized by participants and workers to discuss the program directly often contradicts their experiences; therefore, an investigation into participants' life experiences and histories can augment or even challenge an understanding of the program based on statistical evidence or survey data. This project also contributes to a growing body of research based on qualitative methodology that explores the complexity of CCT programs through in depth interview and observation. What emerges is a motif of discrepancies: Discrepancies between the ideological underpinnings of the program and participants' experiences of poverty, as well as discrepancies between program objectives and actual program functioning. As a result, a number of critiques arise regarding service quality, the efficacy of conditionality, and program sustainability in the face of proposed expansions.

Keywords: Conditional Cash Transfers; Poverty; Mexico; Social Programs; Oportunidades

¿Es que hacemos las cosas sólo para recordarlas?

*¿Es que vivimos sólo para tener memoria de
nuestra vida? Porque sucede que hasta la
esperanza es memoria y que el deseo es el
recuerdo de lo que ha de venir.”*

(Jaime Sabines, Recogiendo Poemas)

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Table of Contents

Approval.....	ii
Partial Copyright Licence	iii
Ethics Statement.....	iv
Abstract.....	v
Quotation.....	vi
Acknowledgements.....	vii
Table of Contents.....	viii
List of Acronyms.....	ix
Chapter 1. Introduction.....	1
Chapter 2. Literature Review: Conceptual Underpinnings of CCT Programs.....	3
Chapter 3. A Question of Methodology.....	6
Chapter 4. Program Rhetoric and Official Participant Rhetoric: Re-enforcing Notions of a Culture of Poverty	12
4.1. Support not a Right: Focusing on Individual Responsibility	13
4.2. Making Better Choices: Patriarchal Tropes and Assumptions	16
Chapter 5. The Disconnect Between Experience and Rhetoric: An Ethnography of Poverty	20
5.1. The Economy, Agriculture and Employment.....	22
5.2. Perception and Value of Health and Education Services.....	27
5.3. Underfunding and Overstretching: Concerns about Institutional Quality	29
5.4. Access and Cost Issues.....	34
Chapter 6. Conclusion.....	40
References	42
Appendix A. Interview Respondents Table	44
Appendix B. General Interview Topics.....	45

List of Acronyms

CBTis	Centro Bachillerato Técnico
CCT	Conditional Cash Transfer
IMSS	Instituto Mexicano del Seguro Social
INEGI	Instituto Nacional de Estadística y Geografía
UCT	Universal Cash Transfer

Chapter 1.

Introduction

Mexico's Conditional Cash Transfer (CCT) program, Oportunidades, is one of the most famous and highly touted of its kind in the world. Aimed at building human capital and alleviating poverty, the program has been hailed a success with proponents citing a large body of statistical evidence, including increased school attendance and health service usage, as well as improved indicators of nutrition. Yet, far less information is available on the quotidian experiences of the program from the point of view of beneficiaries and those involved in administering the program and its related services. In many evaluations of Oportunidades the voices of those who function within the program on a daily basis are ignored or glossed over, while other evaluations only utilize superficial survey style responses by participants to reaffirm statistical data. By looking into the personal experiences and life histories of program beneficiaries and workers, we can gain insight into important issues that do not always arise in quantitative data or surveys that only directly address the program. The interviews for this research project were conducted in Comitán, Chiapas and surrounding rural communities, situated in the highlands of Chiapas, in one of the nation's poorest regions. While the data collected is therefore strongly rooted in a specific context of time and place, its specificity allows for an in-depth investigation into the inner workings of the program and the nature of poverty that could be relevant for other regions of the country, and can augment data produced on CCT programs running in other countries. This major project suggests that the formal rhetoric utilized by participants and workers to discuss the program directly often contradicts their experiences; therefore, an investigation into participants' life experiences and histories can augment or even challenge an understanding of the program based on statistical evidence or survey data. This project also contributes to a growing body of research based on qualitative methodology that explores the complexity of CCT programs through in depth interview and observation. What emerges from the

interviews is a motif of discrepancies: Discrepancies between the ideological underpinnings of the program and participants' experiences of poverty, as well as discrepancies between program objectives and actual program functioning. As a result, a number of critiques arise regarding service quality, the efficacy of conditionality, and program sustainability in the face of proposed expansions.

Chapter 2.

Literature Review: Conceptual Underpinnings of CCT Programs

CCT programs offer a targeted injection of capital into poor households, which ostensibly allows poor families to increase their standard of living while simultaneously encouraging desirable behaviours. Mexico has one of the longest running and most highly touted CCT programs. Over the past 16 years, under various names and administrations, it has survived and thrived, becoming the country's single largest social support program, and at the same time a model utilized by other developing nations. From its inception in the early 1990's to its official launch under the name PROGRESA in 1997, Mexico's CCT program has attempted to undertake poverty reduction through cash transfers dependent upon participation in health, education and nutrition initiatives and services. Unlike many programs in the country's history, Mexico's CCT program, now called Oportunidades, has survived changes in administration and is currently the country's most significant social assistance program, with over 6.5 million families in 100% of the country's municipalities receiving the benefit.¹

Much of the literature on CCT programs (both supporting and opposing these programs) addresses the ideological underpinnings on which these programs are built. Existing literature critically analyzes program structure, goals, and means for achieving these goals in order to reveal the underlying ideology of the program, as well as the nature of poverty, its causes, and its remedies. While there are conflicting conclusions regarding the efficacy, ethics and utility of CCT programs, both positive and negative evaluations identify an underlying program ideology that is based on theories of cultural

¹ "Oportunidades: A Human Development Program", Government of Mexico, accessed, September 17, 2013, http://www.oportunidades.gob.mx/Portal/wb/Web/oportunidades_a_human_development_program

poverty. Many of the positive evaluations of Conditional Cash Transfer programs express the notion that personal choice and accountability are root causes of poverty, concluding that CCTs can act as a form of behavioural conditioning that helps to break poverty cycles. The 2009 World Bank Report on CCTs points to a body of evidence based on modern research in behavioural economics that posits that people “often suffer from self-control problems and excessive procrastination, in the sense that their day-to-day behaviour is inconsistent with their own long-term attitude toward the future.”² Similarly, other researchers have suggested that the conditionality aspect of CCT schemes encourages the poor to use public services like healthcare and education, thereby strengthening the relationship between service providers and the poor.³ Likewise, Fernald, Gertler and Neufeld (2008) discuss the conditionality of CCT programs as “incentives for parents to invest in their children’s health and wellbeing”.⁴ As such, CCT programs ostensibly use money to motivate beneficiaries to act in ways they normally would not. The two assumptions that lurk in this assertion are: a) that the poor are poor because of their personal choices and actions not because of structural issues; and, b) that the choices the poor make in the absence of incentives are inherently bad choices. The notion of incentivizing desirable behaviours is rooted a belief that the poor are responsible for their state of poverty, a state which is the result of their personal choices and behaviours. Much of the positive evaluations of the program are based on the underlying assumption that the poor make decisions that cause them to be poor, and that the best way to change their state is to mould their behaviours through conditioning.

The literature that critically examines CCT programs interprets the ideology behind these programs in a very similar way; however, rather than seeing this ideology as sound, accurate and useful, it critiques it as misguided and harmful. de Brauw and Hoddinott (2010) assert that “conditioning can be understood to imply that the poor

² Ariel Fiszbein, Norbert Rüdiger Schady, and Francisco H. G. Ferreira .*Conditional Cash Transfers: Reducing Present and Future Poverty*. (Washington, D.C.: World Bank Publications, January 1, 2009)

³ Laura B. Rawlings and Gloria M. Rubio. *Evaluating the Impact of Conditional Cash Transfer Programs*. The International Bank for Development and Reconstruction (Oxford: Oxford University Press),20:29-55.

⁴ Lia Fernald , Paul J Gertler and Lynnette M Neufeld. “Role of cash in conditional cash transfer programmes for child health, growth, and development: an analysis of Mexico’s Oportunidades” *Lancet* 571 (2008):828-37.

simply do not know what is good for them”⁵, asserting that governments impose conditionality because they believe the poor are inherently incapable of making good decisions in regards to their own welfare. Similarly, Yanes (2011) has traced the ideology of CCTs back to “a colonialist logic of poor Indians who are ignorant and burdened with many children”⁶. In this analysis, the state is depicted as the colonizer, and the imposition of conditionality is therefore seen as an act of domination, a paternalistic assertion of superiority, rather than a motivating push, as it is commonly depicted in many positive evaluations of the program.

The understanding of poverty, which has been attributed to CCT programs by both proponents and detractors, is based on the idea of a Culture of Poverty first put forward by Oscar Lewis in his seminal works on intergenerational poverty. The Culture of Poverty theory is derived from Lewis’ case studies of a number of poor families in Mexico that trace the root causes and trajectories of intergenerational poverty, identifying a number of cultural characteristics that supposedly function to perpetuate poverty. Lewis defines poverty culture as a “design for living which is passed down from generation to generation...a way of life, remarkably stable and persistent, passed down from generation to generation along family lines”⁷. Lewis also identifies the attitudes, values and character structure of the individual as main categories that define the Culture of Poverty, and as such highlights the individual’s role in creating and maintaining the state of poverty in which they live. Lewis’ theory has been used to substantiate social programs that re-focus the critical lens on the poor themselves rather than the state, creating mechanisms that increase personal accountability and perhaps even blame for one’s lot in life. This conceptualization of poverty places the onus and responsibility on the individual and thus decreases the responsibility of the state to provide for the poor.

⁵ Alan de Brau and John Hoddinott, “Must conditional cash transfer programs be conditioned to be effective? The impact of conditioning transfers on school enrolment in Mexico”, *Journal of Development Economics* (2010): 231.

⁶ Pablo Yanes, “Mexico’s Targeted and Conditional Transfers: Between Oportunidades and Rights”. *Economic and Political Weekly*, (2011) vol XLVI no 21.:51.

⁷ Oscar Lewis, *The Children of Sanchez: Autobiography of a Mexican Family*. (New York: Vintage books, 2011), 155

Chapter 3.

A Question of Methodology

There seems to be a divide in the literature on CCT programs, with some academics pointing to quantitative evidence that shows increases in educational attainment, decreased poverty levels and better health and morbidity outcomes, and others utilizing a qualitative approach that highlights problems with these programs, often based on the ethics and efficacy of conditionality. Clearly, the methodology employed not only reflects the concerns of the researcher, but also determines what the study will conclude. Numerous quantitative studies on CCT programs have shown that these programs have led to increased use of services, and other measurable outputs such as increased attendance and growth rates and nutrition levels. Rawlings and Rubio summarize the substantive findings on the effects of CCT programs, noting that- among other areas-CCTs have led to increased enrolment rates and improvements in child health and nutrition⁸. The use of quantitative methodology helps to legitimize claims of success by providing measurable statistics that indicate an upward trend in desirable behaviours or outcomes. In another commonly cited article, Reimers, et al. examine the efficacy and impact of CCT schemes, concluding that these they positively affect school attendance rates and number of years of schooling completed⁹. While studies like Rawlings and Rubio and Reimers et al are often used to demonstrate the tangible successes of CCT programs, critics counter that these measurable outputs are not necessarily indicators of the accumulation of human capital, or long-term benefits, as suggested. Moreover, and perhaps more importantly, it is also important to consider how accurately these statistics reflect the on-the-ground experiences of the program; in other

⁸ Rawlings and Rubio, "Evaluating the Impact"

⁹ Fernando Reimers, Carol DeShano da Silva and Ernesto Trevino, "Where is the "Education" in Conditional Cash Transfers in Education?" UNESCO Institute for Statistics, (Montreal: UNESCO, 2006).

words, we need to explore the dynamics of the program, not just the statistical trends. While positivists may critique the generalizability and salience of examining everyday practices and day-to-day experiences, such examinations can in fact “provide a critical insight into the everyday socio spatial constitution of power- not despite but because of their banality”¹⁰. This project seeks to understand the human experiences of poverty and CCT programs through extensive observation as well as semi-structured and unstructured interviews with those who are involved in these programs on a day-to-day basis, including both recipients and those involved in various aspects of service delivery and program administration.

The interviews that are the basis of this project were conducted over a period of five weeks in southern Chiapas, Mexico. One of the largest cities in the region, and one of the interview sites, is Comitán city. Comitán is a mid sized city located in the heart of the Chiapanecan highlands, in the south of the state, in the municipality of Comitán. The municipality itself consists of approximately 121,000 people, who reside in the urban center of Comitán as well as in a number of rural communities in the surrounding area. Within Comitán city the research took place in a single neighbourhood, Los Desamparados (“The Abandoned”), on the outskirts of the urban center. The two rural communities included in this study, Lázaro Cárdenas and Esperanza, are located approximately an hour and a half south down the highway from Comitán City, minutes away from the border with Guatemala. While Mexico itself is now considered a middle-income country by most accounts, the state of Chiapas has extremely high levels of poverty and, thus, is a fitting region for an investigation into the program and its relationship to poverty. According to the official Oportunidades website, Chiapas has the lowest rating in the country on the Human Development Index, and the largest number and percentage of beneficiaries of the program in the entire country, with almost 60% of the state’s families receiving the benefit.¹¹

¹⁰ Anna J. Secor, “Between longing and despair: state, space and subjectivity in Turkey”, *Environment & planning : international journal of urban and regional research.*(London : Pion, 2007) : 42.

¹¹ Oportunidades: A Human Development Program. www.oportunidades.gob.mx. Accessed August 11, 2013.

While there are a number of poor communities in the area with a large percentage of their population receiving Oportunidades, the locations chosen for this project were selected mainly because of pre-existing connections I had from working in these towns and neighbourhood, or through contacts that had worked or lived in these areas. My familiarity with the region and the language, as well as my network of existing contacts built up from the three years I lived in the region proved to make the procurement of participants quite easy. Initially, participants were recruited through introductions by two existing contacts: Ana Paulina, a teacher who works in Lázaro Cárdenas, and Lupita, a former school administrator for a large technical school (CBTis 108) in Comitán, who was living in Los Desamparados. From these initial contacts snowball sampling was utilized, as participants directed me to other potentially interested and willing respondents.¹² An important methodological consideration is my embeddedness and history within the community prior to beginning this investigation. I lived in the city of Comitán from 2005-2008, working as an English instructor. In this position, I delivered a program designed for Telesecundaria schoolteachers in rural communities to help them learn basic English and develop techniques for teaching English in their classrooms. My interest in Oportunidades arose from this experience, as it was often a topic of conversation amongst the teachers who commented frequently on the program's administrative burdens, as well as the ways in which they manipulated the program, through actions like underreporting absenteeism. This history and experience with the program opened a number of doors for me in terms of gaining access to participants; moreover, it clearly influenced the information I was looking for in my interviews, and gave direction to the topics addressed in my conversations. Additionally, my close relationships with my pre-existing contacts, Lupita and Ana Paulina are also important to consider when analyzing the information I gathered, and the identity of respondents. The fact that most of the respondents were referred through these two individuals means that Lupita and Ana Paulina played an important role in determining the sources of information I would come into contact with. While the snowball sampling approach ostensibly offers a better chance at interviewing a wider variety of respondents, it is still important to consider the possible bias of using my key contacts to refer respondents.

¹² See Appendix A for a list of Interview Respondents

The choice of both rural and urban interview sites was intentional, and meant to offer a more complete look at how the program manifests itself differently in urban and rural environments, and how the perceptions and experiences of the urban poor compare to those of the rural poor in the region. Additionally, I wanted to interview not only recipients and official program employees, but a range key informants with knowledge of the program, including those who were not directly employed by the program but were involved in service provision, like teachers, school administrators, doctors and nurses who unofficially deal with much of the day to day functions of Oportunidades. This breadth of respondents was intended to provide a more holistic evaluation of the program. The topics addressed in interviews were also quite broad, as I wanted to examine not only superficial responses about the program, but also the life experiences of respondents. For a list of general topics addressed in the interviews see Appendix B.

While many interviewees were open and willing to speak about their experiences, there was also a reluctance and fear on the part of many of the beneficiaries, particularly in Lázaro Cárdenas (the first of the two rural communities that I visited), to discuss the program. I wanted to interview *vocales* (the title given to volunteer local program aides) in Lázaro Cárdenas as well as Esperanza, but this proved to be much more difficult, with only one *vocal* committing to an interview but asking not to be recorded or identified. In part, I believe this reluctance is due to the power dynamic that is inherent in the researcher/interviewee relationship, as well as the sense of precariousness felt by recipients who feared that their benefits could be taken away. In Esperanza, the strong relationship between the doctor and the *vocales* made it easier to identify interested respondents, and gain their trust. All interviewees cited in this article provided informed consent for their participation in this study; however, it is important to note that in almost all my dealings with beneficiaries they expressed concern about the potential of losing the financial support, and in general there was a sense of precariousness associated with the benefit amongst those receiving it, despite assurances on the administrative side that beneficiaries rarely lost their benefit. All beneficiaries in the rural communities asked for anonymity in their responses for fear that their participation could affect their status in the program, and as such pseudonyms have been used, and are indicated in the text by the use of an asterisk (*). In Lázaro Cárdenas one potential participant did not

show up for our scheduled meeting, and another gave verbal consent but did not agree to identify herself to me, be recorded, or sign any document. Beneficiaries from Esperanza were initially invited by the clinic doctor to participate at the end of a regularly scheduled meeting for *vocales*. Several of the *vocales* opted out of participating, and those who did remain for the group interview requested anonymity. In contrast, recipients in the urban neighbourhood were willing to provide their personal information and did not request anonymity. This may be related to a greater sense of organization, power and solidarity in the urban communities as opposed to the rural ones, as well as a feeling that those in the urban communities were more likely to make demands from the government, and challenge what they saw as inequalities or inconsistencies.

None of the program staff, healthcare workers or teachers asked for anonymity; however, there was a screening process when I asked to speak with someone from the Oportunidades office in Comitán, where my interview topics were first reviewed by a supervisor before I was assigned a specific employee to speak with. Program staff working in the local clinics was extremely forthcoming and showed no hesitation in discussing the program. Teachers in the schools were also quite forthcoming on a one on one basis but showed some reluctance in the presence of the school's principal, who at one point remarked during our interview that there was no reason for me to interview the teachers as they could not help me. After interviewing several of the teachers, including my initial contact Ana Paulina, it came to light that there was some tension between them, with teachers noting that he often passed on the administrative task of filling in the online Oportunidades attendance reports to teachers, rather than completing it himself. This claim came up after my interview with the principal, and therefore he was not able to substantiate or deny this. It is also important to note that I was unable to interview clinic staff in Lázaro Cárdenas. Although I tried to secure interviews with the community doctor, I was told that he would not be back in the clinic for another three weeks, and I was referred by the teachers in Lázaro Cárdenas to go to the clinic in Esperanza, a community a few minutes down the road, where the local nurse was said to be very helpful. Through this contact I was able to meet the doctor, local health supervisor, the nurse, the 16 *vocales* (eight of whom consented to be interviewed), and a regional promoter. In addition to the staff and residents of the two rural communities I also interviewed two *vocales* from the urban neighbourhood Los Desamparados, as well

as some of their extended family, including husbands, parents and one child who was of the age of majority. Additionally, I interviewed Lupita, a former school administrator for an urban secondary/high school with whom I lived in Los Desamparados during my stay in Comitán.¹³ All interviews were recorded and relevant data from these interviews was selected and transcribed. The scope of this research offers no concrete claims of representativeness or generalizability; however, it does offer a micro-spatial study of the lives and experiences of some of those who are involved in the program, and therefore supports/augments previous research on poverty and CCT programs in general.

¹³ See Appendix 2.

Chapter 4.

Program Rhetoric and Official Participant Rhetoric: Re-enforcing Notions of a Culture of Poverty

The program Oportunidades is, in a very concrete way, representative of the state in the communities where I researched, with the term *el gobierno* (the government) frequently used interchangeably with the program itself in day-to-day conversations. The state itself is not just an abstract concept, nor is it a mere conglomerate of institutions that deal with logistics of running the country; it is also “a powerful site of cultural and symbolic production”¹⁴ that creates and perpetuates ideology. Cultural and symbolic production is evident in the program Oportunidades through the use of rhetoric and propaganda, which serves to re-enforce notions of a culture of poverty, in which poverty is depicted as transmittable and personal rather than structural. Michel de Certeau’s definition of rhetoric is useful in understanding the role of Oportunidades program materials in shaping the way in which poverty is understood and discussed. According to de Certeau, rhetoric is described as “the turns or tropes of which language can be both the site and the object; these manipulations are related to the ways of changing the will of another”¹⁵. Thus, rhetoric is important in that it can shape not only the perceptions of its audience but also their actions to match the ideology of the speaker/writer.

Participant feedback in a number of previous studies has indicated satisfaction with CCT programs, and specifically with the aspect of conditionality. These results have in turn been used to legitimize the conditional nature of the benefits by supporting the

¹⁴ Javier Auyero, *Patients of the State: The Politics of Waiting in Argentina*, (Durham & London: Duke University Press, 2012): 6.

¹⁵ Michel de Certeau, *The Practice of Everyday Life*, (Berkeley: University of California Press, 1984) : xx.

claim that even those who are forced to meet the burden of conditionality have no qualms with doing so. However, it is important to consider the complexity of responses (particularly once we recognize the power that program rhetoric can have in shaping these responses) when evaluating participant satisfaction, as our words do not always reflect our feelings, experiences or realities. It is therefore important to distinguish between what people say and what they experience, particularly when approaching this topic as a researcher. In my interviews with respondents I discovered that there were often contradictions between what people said about poverty in the context of the program and what they said about poverty in the context of their own life experiences. To more easily differentiate between these two tiers of responses I have termed the superficial responses that echo the rhetoric, vernacular and lexicon of the program itself as “official participant rhetoric”. This official rhetoric was frequently used by participants when asked in general about the program, and was most often utilized early on in our conversations. Characterized by program specific vocabulary and ideology, this official participant rhetoric was often markedly different from the way participants spoke about poverty outside of the context of the program. When we compare the rhetoric of the program with what I term “official participant rhetoric” the similarities are uncanny. The following sections outline some of the main cultural poverty tropes in Oportunidades program rhetoric and the ways in which these tropes were repeated in official participant rhetoric.

4.1. Support Not a Right: Focusing on Individual Responsibility

Oportunidades’ program materials emphasize personal responsibility and create an image of the program that frames the cash transfers, as well as the social services made available to participants, as an added *apoyo* (support) in what is ultimately their own personal journey to pull themselves out of poverty. Program materials rarely reference the structural factors that contribute to poverty, or the responsibility of the state in addressing these factors. In the 2010 version of the beneficiaries’ guide “Learning Together to Live Better: Orientation and Training Guide for Beneficiaries of the Program Oportunidades” one of the first stories in the text describes an indigenous woman named Edith. The story of Edith recounts a fictional scenario of what is ostensibly a “typical”

beneficiary. According to the anecdote “at the beginning she didn’t want to enter the program because she felt like it was accepting that the government would maintain her. But later she realized that it wasn’t about this, rather it was about joining this support with her effort and that way moving forward.”¹⁶ Clearly, as evident in this story, individual effort is depicted as the central means through which poverty is combated, with government support taking a secondary role. The onus is placed on the individual, and Edith’s efforts, in conjunction with the added bonus of the CCT, are what will determine her destiny. In the participant’s manual the program is also described as one “that shares responsibilities” and terms the conditions that must be met by recipients as “*co-responsabilidades*” (co-responsibilities). These co-responsibilities include meeting school and medical appointment attendance requirements, as well as the administrative responsibility of completing paperwork and keeping records up to date. The text goes on to explain that “just like the Federal Government, those who receive the support have to fulfill their duty so that resources are used adequately, because it is money from our taxes; that is to say, from the whole nation.”¹⁷ It also outlines participant obligations, focusing on personal behaviours, habits and choices, particularly the use of resources. While references to personal responsibility are abundant, there is very little mention of the state’s specific responsibilities besides providing the financial support. Another chapter of the guide book addresses community action or “self help”, encouraging participants to organize within their communities to work for change. The book describes community action in the following terms: “*autogestión* (self-help) is the capacity that people have to confront our own problems, thanks to organization and cooperation”¹⁸. The problems, and once again the onus to address them, are placed upon the community, not the state. While the book vaguely states that self-help does not relieve the government from its duties, the scenarios given are ones in which the government has clearly failed to provide essential services to the community, and the community has had to step up to do things for themselves. While on one hand the promotion of self-help

¹⁶ Aprendamos Juntas a Vivir Mejor: Guia de Orientacion y Capacitacion para titulares beneficiarias del Program Oportunidades, (Mexico, D.F.: Coordinacion Nacional del Programa de Desarrollo Humano Oportunidades, 2010) : 11.

¹⁷ Ibid, 22.

¹⁸ Ibid 202.

and community empowerment is positive, it also functions to shift the blame and responsibility back onto individual communities rather than the state.

The program employee I spoke with at the head office in Comitán also used much of the same rhetoric regarding responsibility in discussing the program. A local from a neighbouring town, Jose Antonio has worked with the program, under the names PROGRESA and now as Oportunidades for the past 15 years. Beginning first as a survey taker, and now as a client attention representative, Jose Antonio has experienced different facets of the program and seen its development over the years. Jose seemed genuinely passionate about the program, and highlighted its role in increasing attendance, health and nutrition amongst the poor. He was careful, however to emphasize the fact that injection of capital was secondary to the "*parte humana*" of the program, which focuses on moulding participant behaviour. Similar to program materials Miguel also repeatedly used the term "support" to describe the cash transfer, placing emphasis on the individual's role in coming out of poverty. He stated that it "is a support so that *you* can move forward out from the poverty that *you* have" (my italics). He clearly emphasizes and uses the informal version of the pronoun "you" (which is not grammatically necessary in Spanish) highlighting the importance of the individual in the action. This quote has two major implications that reflect the culture of poverty paradigm: 1) that poverty is a personal problem 2) that poverty is something you can get out of on your own. This assertion takes the onus for poverty alleviation off of the government and places it squarely on the individual, a common theme within program rhetoric.

The very same ideology was reflected in the official rhetoric of participants whose initial assessments and descriptions of the program consisted of describing it as an "*apoyo*" and also included reference of their own responsibility as the central mechanism for program success. Participants recounted the importance of meeting their responsibilities, and at the same time the support was depicted as a gift rather than a right. "*Gracias a este apoyo*" (thanks to this support) was a common refrain in the initial stages of many of the discussions I had with beneficiaries, and many interviewees expressed gratitude to the government for the CCT program. One of the *vocales* in Esperanza explained that they had been specifically told by program representatives to refer to the money provided as an "*apoyo*" or support saying "they tell us 'don't say we're going to receive our payment, we're going to receive our money- it's support... because

payment is when you are working; what the government gives us is support.” Another common theme that arose when asked directly about the program, was that it was the recipients’ responsibility to make good decisions and to ultimately change their situation; the government is only helping them to do so with a bit of financial support. This was often discussed using the term “*co-responsabilidades*” (co-responsibilities) with the state’s responsibility implied as providing the extra injection of capital, and the beneficiaries responsibility being to use this money appropriately, comply with conditions and ultimately escape from poverty. Maria Elena, the daughter of a *vocal* named Doña Queta from Los Desamparados said “the government gives to us, but we also have to give”. Similarly, another *vocal* from Los Desamparados, Doña Toña, described the new motto of the program “Moving Mexico” to me saying, “ the *Licenciado* told us ‘Moving Mexico’ doesn’t mean that they are going to move the people, but rather that you are going to move yourselves. This is what ‘Moving Mexico’ means, that people put themselves to work, that they move, that they aren’t waiting to have things given to them”. An interesting note about Doña Toña’s use of program rhetoric was that she often framed it by saying it was what the program representative, whom she referred to as the *Licenciado*, (a formal title used only for university graduates) told them. This reference hints at the fact that these ideas come from the program and not necessarily the speaker, but also reveals a power dynamic at play in the relationship. The title “Licenciado” is used for university graduates in Mexico to denote respect and status, and in this case, explicitly distinguishes the status and educational level of the beneficiary from the program representative; it appeared Doña Toña saw this title as a sign of his authority and credibility. She clearly seemed to respect the *Licenciado*, and cited him frequently in our interview. In direct reference to the program Doña Toña and other respondents tended to use the expressions of personal responsibility and government benevolence that were common in program materials, often using the exact terminology, or directly citing program staff.

4.2. Making Better Choices: Patriarchal Tropes and Assumptions

As discussed in the literature review section of this paper, some researchers have criticized conditional cash transfer programs as being paternalistic, patronizing and

colonialist in their very nature. Program rhetoric often reflects this ideology as well, with a common trope being the beneficiaries' inability to make good choices in the absence of government direction, or prodding. From the very presentation of the beneficiaries' program materials the infantilization of the beneficiary is palpable. The bright colours, cartoons, games and activities are reminiscent of a children's activity book. While literacy is an obvious concern, the layout of the books and the tasks assigned go beyond an attempt to make learning visual, and reveal in a very tangible sense the way in which its readers are perceived: as incapable children in need of the guidance of the state.

A central patriarchal trope evident in program and official participant rhetoric is the inability of the poor to make good choices on their own, in the absence of conditionality. The notion of decision-making, one of the key aspects in a theory of a Culture of Poverty, is addressed in program materials as participants are instructed in length on how to "distinguish between what we want and what we need"¹⁹. The book goes on to assert "when we don't know how to distinguish between a need and a desire, we run the risk of dedicating our efforts and resources to what we want, and forget about what we really need"²⁰. This was uncannily repeated by one of the *vocales* from Esperanza who said "it is not the same to want something as to really need something" when discussing the use of conditions in the program. Miguel also echoed this idea in our interview. He described the dynamic of conditionality as one in which "you fulfill your part and you'll receive". When asked whether he thought people needed conditionality in order to make better decisions regarding health and education he said that the conditionality acted as an "incentive" or a "push" for people to make better decisions. The conditionality, he claimed, helps people to "become conscious of the fact that there are things that are worth it". Conditionality, is therefore framed as a necessary part of moulding participant behaviour and awakening them to what is important. The assumption is that beneficiaries would otherwise not value the things that are "worth it" if it were not for conditionality. While he stated there is no way to check up on how people use their money, the program training and the requisite attendance at health appointments and at school are meant to educate the poor on making good decisions.

¹⁹ Ibid, 50.

²⁰ Ibid.

When asked directly about the aspect of conditionality and whether in fact participants felt that the addition of conditionality to the provision of the benefit encouraged beneficiaries to make better decisions, and to utilize services, most responded yes; however, these responses were often framed in terms of “others” as talk of personal responsibility and that “others” probably wouldn’t complete the requisites if it were not for the conditionality of the program was common. Doña Toña described the program saying: “they teach us how to spend the support, because there are many beneficiaries who, as soon as they get the support, they’ve already spent it , and they’re spending it on clothes, things that aren’t that necessary. So, they show us not to spend but to save it for an emergency or an illness, that we should save.” A number of beneficiaries also claimed that they were happy with the imposition of conditions, and several also expressed that they felt the government had their best interest in mind, and that without the requisites that many people would likely not make appropriate choices. However, as the following section will explore, the official participant rhetoric regarding personal choices and behaviours as causes of poverty does not seem to be reflected in the personal narratives and experiences with poverty and service provision expressed by interviewees.

To sum up, evidence of culture of poverty ideology and Oportunidades’ specific ideological framework can be found in the materials and rhetoric used in training both beneficiaries and program staff. Program rhetoric, espoused in materials and by program workers, as well as the “official participant rhetoric” depict the program as a gift rather than a right, downplaying the state’s responsibility in providing for its citizens, and focusing on individual actions/choices in overcoming poverty. Moreover, both program rhetoric and official participant rhetoric frame conditionality as a necessary and beneficial aspect of the program that encourages the poor, who would otherwise be unwilling or unable to make good decisions, to make choices that will help them get out of the poverty trap and improve their lot in life. Thus, not only are recipients “educated” in the areas of hygiene, health, nutrition and education, but also, indirectly they are indoctrinated with an ideology about poverty itself, which acts to effectively justify the inequality that they experience. Both recipients and administrators are taught through official program material that an individual’s ultimate success is dependent not on the

minimal financial contribution of the government, but on their own hard work, choices, behaviours and compliance with program requirements.

Chapter 5.

The Disconnect Between Experience and Rhetoric: An Ethnography of Poverty

If recipients themselves seem to be content with the program and even echo its ideology, who are we as researchers to second-guess its efficacy or criticize its theoretical basis? The problem with accepting participant responses at face value is that it assumes that participant rhetoric necessarily matches participant experiences, and that the official story is the most accurate story. While direct responses about satisfaction should not be merely discounted, it is also important to delve further into the experiences of those who are involved in the program, particularly when looking to evaluate program efficacy. When speaking directly about the program the pervading ideology expressed by recipients reflects Culture of Poverty theory and emphasizes personal responsibility and the inability of poor people to make good choices in the absence of imposed conditions. However, when respondents discussed aspects of poverty outside of the frame of reference of the program, details that seem to conflict with the notions of Cultural Poverty Theory begin to emerge, namely the structural factors and program inefficiencies that perpetuate poverty and inequality.

The debate on the accuracy of Culture of Poverty Theory is complex and contentious. Clearly, people (poor or otherwise) do not always utilize their resources effectively, and in some cases personal choice and behaviours can and do in fact influence one's socio-economic position. In a number of the interviews cited, personal choices, like the choice to get married and have children at a young age, or the choice to spend money on alcohol rather than schooling do affect the outcomes of the lives of respondents, as they recognize and note themselves. Yet, the problem is not that the claim that individual choices can perpetuate poverty is inaccurate, but rather that it

erroneously focuses on superficial symptoms rather than roots causes. Proponents of Lewis' culture of poverty theory often fail to cite his assertion that poverty commonly "develops when a stratified social and economic system is breaking down or is being replaced by another".²¹ But even Lewis himself shies away from the very topic he brings up, relegating this important claim to a few paragraphs in the introduction to his book, and instead focusing the bulk of his research on individual pathologies and behaviours. The problem with Lewis' theory is not that it is entirely inaccurate but that it shifts the focus away from structural problems. The veracity culture of poverty theory is challenged when we critically examine the experiences of the poor, paying particular attention to the structural factors that perpetuate and sustain socio-economic inequalities. By focusing on personal choice and individual behaviour, culture of poverty supporters distract from larger structural issues of what makes resources scarce for poor people to begin with, and how the dispossessed are kept in positions of marginality through a history of state failures. This represents a "de-politicization of poverty"²² in which poverty is removed from the structural and institutional framework in which it exists and perpetuates. Such de-politicization helps to create consensus, acceptance or complacency with the program, and thus a fragile program can be maintained despite its weaknesses. In this same critical vein, Phillippe Bourgois has explicitly challenged 'culture of poverty' theory stating that it is a "psychological reductionist and individualistic interpretation of the persistence of poverty"²³, concluding that poverty cannot be distilled to individual pathology or transmittable culture, but rather that social structures (like inequality, racism, and capitalism) perpetuate poverty. Like Bourgois and Harriss, Green and Hulme (2005) argue that the conceptualization of poverty in mainstream research has turned poverty into an external state, which is seen as the consequence of individual choices and not of social relations, or the processes of the accumulation and distribution of wealth.²⁴ The following sections discuss structural roots of poverty and program

²¹ Lewis, *Children of Sanchez*, xx

²² John Harriss, "Bringing Politics Back into Poverty Analysis: Why Understanding Social Relations Matters More for Policy on Chronic Poverty than Measurement", *Chronic Poverty Research Centre Working Paper 77*, (2007).

²³ Phillippe Bourgois, "The Culture of Poverty", *International Encyclopaedia of the Social and Behavioural Sciences*, (2001): 2.

²⁴ Maia Green and David Hulme, "From correlates and characteristics to causes: thinking about poverty from a chronic poverty perspective" *World Development* 33 (2005): 867-879.

inefficiencies that arose in my interviews and observations. These experiences shed light onto the reality of poverty and the efficacy of the program, a reality that is not entirely or accurately reflected in program and official participant rhetoric. What emerges from this analysis is an image of a weak economy and a state that is unable, or unwilling to adequately serve the needs of the poor in health and education, the very areas the program seeks to address.

5.1. The Economy, Agriculture and Employment

While program rhetoric talks about the importance of participants improving their spending habits as an integral component of improving their lives, interviewees who shared their experiences around employment revealed a different reason for their low savings, one that is based on structural issues including a poor economy, a lagging agricultural sector and lack of viable employment opportunities. These political, and structural causes of poverty, while often neglected in the policies and programs that aim to alleviate poverty, were salient topics for those with whom I spoke. The economy in Chiapas is dominated by agriculture. As the largest primary industry in the state, and over 1/3 of the active population engaged in agricultural activity, agriculture is an important aspect of the economic landscape of the region.²⁵ Both Lázaro Cárdenas and Esperanza, like many communities in rural Mexico and particularly Chiapas, are dependent upon agriculture as the main source of employment and income. Close to Lázaro Cárdenas is a large agricultural production facility where a number of residents are employed. Others in the community work plots of land for local landowners, while others have their own small plots of land that they work on in order to reap produce that is then sold in town, or in the city markets. The community also has a maize storage facility at the entrance to the town that farmers sell their product to, a business which is affiliated (according to signage) with well known food production giant Monsanto. Besides agricultural production, some in the community work in construction or as handymen for odd jobs. Two of the teachers I spoke with from Lázaro Cárdenas also indicated that some of the residents in the community were involved in the drug trade.

²⁵ National Survey of Occupation and Employment, last quarter of 2012, INEGI.

They said that because the town lies so close to the border with Guatemala, drugs flow through the community on a regular basis. They also said that their students often joked or commented that they wanted to be *narcos* (drug dealers) when they grew up, and speculated that this was related to the fact that the drug trade was becoming more prominent in the community. When visiting the middle school in Lázaro Cárdenas I asked a group of third year (14 year old) middle school students what they wanted to be when they grew up. They gave a variety of responses including agricultural engineer, lawyer and teacher, but one student answered *narco*, which was followed by a cascade of laughter and some nods from other boys in the group. Five boys in the group also indicated that after graduating secondary school that year they planned to work in the fields.

In Esperanza, however, the main source of employment is small-scale agricultural production. Most people in the town do have their own small plots of land and but were essentially earning their incomes by selling their labour for a marginal part of the profits gained by the larger landowners from selling their products. Concerns about employment and wages in agriculture were abundant during conversations with residents of the community, and many respondents attributed their financial struggles to both a shortage of employment and the low wages that were so common for the agricultural industry. Participants stated that the work in agriculture was far from consistent and that often the men in the community were often able to work only 2 days a week because of the high demand for jobs and low availability. When asked about employment in agriculture, one of the vocales from Esperanza also said “here, they only get paid in planting and harvest seasons, but only 100 pesos [a day]. And harvest season is only once a year”. Interviewees expressed that prices and demand for agricultural goods have gone down and that has caused financial hardship amongst the majority of the community’s members. Moreover, as another respondent stated “After what we consume, the rest is sold, but in order to go back to work again, it [the money gained from selling the crops] almost doesn’t suffice.”

Lázaro Cárdenas and Esperanza are quite representative of the economic situation in many rural Chiapanecan communities, both in terms of the dominance of agrarian activity and the low wages associated with employment in agriculture. As highlighted in the now notorious 1995 Zapatista uprisings, agrarian issues in Chiapas in

the post-NAFTA era are prevalent, with low wages and prices for products being some of the more contentious issues. One of the most tangible results of NAFTA was the drop in wages and purchasing power. Research has shown that “the performance of real wages under NAFTA has been lackluster at best, and disastrous at worst. There has been a steady erosion in the purchasing power of both minimum and average wages in the 1990s.”²⁶ According to the average salary quote to IMSS by National Activity Sector the agriculture, forestry, fishing, and hunting industry in Chiapas has the lowest salary of all reported economic activities, at a reported \$150.1 pesos per day.²⁷ While this reported daily salary is above the minimum wage in the region (as well as above what interviewees reported as being the average daily salary for their community), its also important to note, as the women I spoke to emphasized, that agricultural work was normally only available 2-3 days a week. As such, the average daily salary was not a regular income that can be extrapolated to a weekly or monthly salary. Additionally, because employment opportunities are only available during sowing and harvesting seasons, the daily salary cannot be used to extrapolate or forecast a yearly income as one might with other more stable sectors. When asked about any government programs or support systems in their communities that addressed the lack of employment opportunities or the low wages/prices for agricultural labour and production, respondents said that there were none and that in their time living in the community not one person reported that they could recall a program that addressed these issues. While interviewees and other research has identified lack of employment and low wages as root causes of poverty in the region, it appears that the government has not, as it continues to focus on personal choice and culture, as identified and addressed through Oportunidades, as the most important cause (or perhaps the most convenient cause) of poverty to address. Respondents also pointed to the reduced price that they were able to demand for agricultural products, with one interviewee specifically citing the “price of corn” as having decreased substantially. This drop in price means that agriculture has been less lucrative and, as a result larger landowners are unable to hire as many

²⁶ Miguel D. Ramirez, “Mexico After NAFTA: A critical assessment” *The Quarterly Review of Economics and Finance* 43 (2003) : 881.

²⁷ Average Salary Quote to IMMSS by National Activity Sector, “Chiapas”, ProMexico: Trade and Investment, (Secretaria de Economia, 2003), accessed October 20 2013, http://mim.promexico.gob.mx/Documentos/PDF/mim/FE_CHIAPAS_vfi.pdf

labourers or must decrease their wage, and smaller scale farmers are receiving less income for the sale of their produce. The economy in Mexico in the post NAFTA period has negatively and disproportionately affected rural workers, particularly in the agrarian sector. Small-scale agricultural production in Mexico in the post-NAFTA period has suffered, as Mexican agricultural producers are unable to compete with their subsidized North American counterparts.²⁸

In Los Desamparados, the urban environment means that agriculture is less important in terms of employment; however, many families did have small patches of land, mostly used for subsistence farming or to supplemental income. I spoke with two families who live in Los Desamparados and are receiving Oportunidades. Doña Queta's family included herself, her husband, Don Avelino, and her daughter Maria Elena. When discussing poverty in their neighbourhood and in the region in general they pointed to a lack of employment and low wages, much like the respondents from the rural communities. However, they noted that with higher levels of education their proximity to Comitán meant that there were more employment opportunities. According to Don Avelino, the main source of employment for residents of Los Desamparados is in the tertiary sector, particularly construction. He also said that the wage for local construction workers was "90 pesos a day", and expressed that "the salary is very low"; however, unlike the inconsistency of employment in agriculture, construction work was more readily available and was prevalent year round. Don Avelino said that for men in the neighbourhood the main area of work is in construction; but, that when there's no work in construction, the secondary option is to work in the fields. He also expressed that the lack of viable employment opportunity in the region meant that employers were able to take advantage of the people's need by offering lower salaries saying: "This is something that's exploited here, because if you need to work you need to work". It was interesting to see that those interviewed in the urban neighbourhood seemed to be more aware of the tensions and structural inequalities that surrounded them than those in the rural communities, and the use of the term "exploit" or the notion of exploitation in general in terms of the underpayment of labour in the region did not come up at all in the

²⁸ Jonathan Fox and Libby Haight. "Subsidizing Inequality: Mexican Corn Policy Since NAFTA", (January, 2011): <http://www.subsidiosparaladesigualdad.org/libro/ingles/1.pdf>

conversations I had with rural residents in either of the two communities. Don Avelino was also cognizant of the role of the economy on a federal level, comparing and contrasting the economic situation in Mexico with that of the US and Canada, pointing out differences in minimum wage as well as in the availability of employment options. He was critical of the state in terms of their lack of investment in the economy or in employment programs.

Besides low paying agricultural jobs or labour jobs in the tertiary sector there is little employment opportunity in either the rural communities or within the city of Comitán. According to my conversations with residents, many young men from Esperanza and Lázaro Cárdenas go to other states, mainly México DF or Quintana Roo, in order to work in factories or in hotels to earn money to send back to their families. Others go to the USA in order to find work and support their families. Respondents expressed that this internal and international migration was a direct result of the lack of employment opportunities in the region. It is also significant because it goes against certain popular perceived notions of poverty in the region as being associated with laziness, complacency or a lack of desire to work. A number of acquaintances and friends from middle class and upper class milieu in Comitán shared with me their perspectives on my project, and on poverty in the region. The overwhelming sentiment from this group was that the poor people in the region were poor because they were unwilling to work hard, and were content, rather, to be dependent on government handouts. All of these perceptions strongly reflect the notion of Cultural Poverty; yet, when compared with the reality of the situation as expressed by beneficiaries, most of the men in the community were under-employed, wanted more work, and made extensive efforts to find work when they were unable to financially support their families.

While migration for work seems to be a common occurrence in the rural towns I researched in, the gains achieved from it were described as minimal by interviewees. Of the *vocales* in Esperanza who were interviewed, three recounted stories of family members who had gone to other states to work, and the corresponding costs associated. One woman, *Liliana said that her son had gone to work on the coast in Cozumel. The money required for his transport and initial settlement costs were substantial, so the family was forced to take out a loan. With an initial down payment, the rest of the cost was covered by a “patron”. While they were paying off the loan, the

patron took their plot of land as leverage. As Liliana recounted “they take a piece of your land as insurance. Once you pay them back they return it, but meanwhile they hold onto it. That happened to me”. One of the structural factors that led to this decision was that as a poor family with no credit, Liliana and her family were unable to take out a conventional loan from a bank. International organizations such as the World Bank have identified the weak nature of the labour market, which includes the lack of employment opportunity and strategic labour migration, as well as limited access to financial markets as important structural causes of poverty²⁹, causes which come into play in Liliana’s story. Spurred by the lack of local employment combined with the inability to get a conventional loan, Liliana and her family were thrust deeper into poverty in their attempt to move out of it. This scenario illustrates how individual choice, in this case the choice to seek gainful employment, has little power if larger structural components, like the labour and financial markets, prevent the poor from accumulating capital.

5.2. Perception and Value of Health and Education Services

In my interviews with beneficiaries, they unanimously and emphatically professed the importance of health and education, even when I challenged them. Interviewees said that education was important for their children, that they valued the educational component of the program, and that the extra injection of capital into their households enabled them to send their children to school rather than to work. A common theme that arose as well was the contrast between mothers’ experiences with education and the experiences of their children’s generation. Doña Queta explained that as a female growing up women “did not have the privilege of continuing our studies.” For her, education was not a right, and as a privilege it was denied to her and other girls because, as she claims, her father was against the idea of girls attending school. She discussed many features of Lewis’ typical ethnographic depiction of poverty: a father who was an alcoholic, who abused her mother and did not allow his daughters to attend school. Doña Queta, however, said that she has seen how education could give people better opportunities than she had, and that for this reason she stresses the importance

²⁹ David Hulme and Andrew Shepherd, “Conceptualizing Chronic Poverty”, *World Development* Vol. 31, No. 3 (2003): 416.

of education with her children. She said that her eldest daughter graduated as a nurse, while her second eldest, Maria Elena, is currently in university, studying business administration. When I spoke with her daughter about her education and how she came to be studying business, she said that her parents had always encouraged her and her siblings to go to school, saying “they taught us that you need to go to school and prepare yourself, and we grew up with that idea”.

The second family I interviewed extensively in Los Desamparados was Doña Toña’s family, which consisted of Doña Toña, her mother and her father (her husband was present but did not participate). Doña Toña has two sons in elementary school, and was in the process of completing her technical high school diploma. She said excitedly “my big dream is to finish high school”. Having dropped out in primary school Doña Tona went on to get married and have her children before deciding to return to school. She completed her primary and secondary schooling via distance education in 7 months, and at the urging of a friend decided to start her high school. Doña Toña stated that she felt an education would give her more opportunities and a better chance and a higher paying job in Comitán, as well as setting an example for her children. It was clear that she placed a high value on education and felt that it would be beneficial. She was charismatic, well spoken and seemed passionate about schooling but also said that she herself was struggling to keep up with the time and financial commitments, as well as the expectations of classroom learning, which she had been away from for so many years.

The *vocales* in Esperanza also shared similar views on the value of education. Of the eight who participated in the recorded group interview, none had completed primary level education. All had said if they had a choice they would have wanted to continue their studies. Of those who shared their reasons for not continuing school, some said it was because their fathers disapproved, while others cited the need to stay at home to help their mothers with household tasks and with caring for younger siblings. These respondents were adamant that they wanted more opportunities for their own children in terms of education. One respondent said “our children have to go to classes in order to have a better education”. They felt that with additional years of education they would have better job prospects, with another participant stating simply “ the more studies you have, the better the job”, elaborating that for “those who want to leave the community to find work, the first thing that they ask for is your certificate of middle school completion-

that's the first thing they ask for, for a job". Even when respondents were challenged or prodded to think about the real, practical impact that education would have on their ability to find paid work, all were adamant that it would increase the likelihood of their children finding better employment in "soft jobs" (jobs that did not require heavy manual labour, like agriculture or construction), even if not in a strictly related field. Jose Antonio, the Oportunidades representative in Comitán also touched on this saying "these days they even ask for a piece of paper to get a job sweeping the floors", suggesting that education can offer a chance at stable employment, even if its in a low paying position, as opposed to the inconsistency and physical stress of work in the fields. Similarly, respondents in both the urban and rural communities discussed the role of the healthcare aspect of the program and said that it was generally of value to them. All respondents had utilized the clinics for appointments other than the visits required of the program, and in my visits to the two clinics in the rural communities both were full of patients, lined up to see the doctor or nurse. Doña Toña expressed her belief in the importance of utilizing healthcare saying "How is it possible that there's a clinic but some people don't go for their check-ups? For me the program doesn't demand anything from me, its for my benefit." Because she already intrinsically valued healthcare she did not find the requirements of attending her check-ups and appointments to be a burden.

5.3. Underfunding and Overstretching: Concerns about Institutional Quality

Despite the fact that people generally valued and utilized the health and education services offered by the program, there were concerns expressed over the overall quality of these services. The rural secondary school in Lázaro Cárdenas that I conducted my observations and interviews in is itself part of the Telesecundaria school system, and as such, course materials are supposed to be projected at set times through a mounted TV at the front of the classroom. However, in my time at the school I noted that the TVs were never utilized, the blank grey screens reflecting the sparsely furnished classrooms rather than projecting educational programming. When I enquired about this I was told that the satellite was in disrepair, and as such the TVs were not functional. The library, which was a decrepit looking shack in the corner of the school yard was used to store old versions of the school texts and to dry clothing. There were

no outside reference materials for students to access, and while the school did have a computer lab they did not have internet access or reference software. The lack of government funding for maintenance has meant that the school's infrastructure and materials are lacking, a problem that affects the teachers as well as students. Teachers noted on numerous occasions that they had to use their own money to buy supplies, including cleaning supplies, for the school because this was not covered by the government, and families' maintenance fees did not suffice for all the costs generated. Parents also expressed concern over the quality of the school, particularly in terms of the infrastructure. One of the more outspoken of the *Esperanza vocales* said: "We want the government to see how their schools are, because its in ruins, you could say. Sometimes they say 'we're going to give support to the children', but the school itself also needs to be good. Because if they send computers, but they don't function, then the children can't do their work".

For the most part, it appeared that salary was not the foremost concern for teachers. All teachers but the computer teacher and Ana Paulina have tenured positions or "plazas" which guarantee them a great deal of job security and benefits. The teachers in Lázaro Cárdenas were paid approximately 12,000 pesos per month, which is a respectable salary for the region. Ana Paulina, as an intern, makes 50% of the regular salary, which was a source of frustration for her. She and the computer teacher were the only teachers I spoke to who mentioned salary as an issue for them. Despite a general sense of acceptance (if not complete satisfaction) with the pay they were receiving, there seemed to be a malaise, as well as a genuine frustration with the expectations associated with their jobs. Ana Paulina (the intern instructor of the 3rd year middle school group in Lázaro Cárdenas), candidly discussed her concerns regarding the quality of education in the rural school system, a system that she has worked in for the past two years. According to Ana Paulina, much of this sense of apathy came from a feeling of being overworked, overwhelmed, and underfunded, sentiments that were exacerbated by the extra demands that Oportunidades added to teachers' job descriptions. The lack of functioning satellites also meant that there was a greater responsibility on the teacher in terms of lesson planning and teaching. This is a salient concern as several of the teachers shared that they felt under-qualified to be teaching some of the subjects, with English being the most regularly cited problem subject. In Mexico, Telesecundaria

teachers do not undergo any teacher training and were not required to have any previous teaching experience. Although teachers were provided with a curriculum and syllabus, all the teachers at Lázaro Cárdenas said that they rarely followed the guides provided because of the lack of materials, as well as the advanced learning pace that they expected. Ana Paulina said that it normally took her twice as long to complete the activities as is stipulated in the program guide. Student participation and level were additional concerns teachers raised. Ana Paulina discussed the level of her students, saying that compared to urban schools they were quite low. She said that often students are passed through a level without having come even close to achieving the educational objectives of the previous grade; as such the instructor spends a great deal of time trying to teach the fundamentals which are necessary in order to continue on with the curriculum.

The IMSS/Oportunidades clinic I visited also appeared to be grossly underfunded. The bare cabinets in the clinic were apparently the result of both a lack of medication provided as well as transport and delivery issues. The doctor at the clinic told me that medication had to be formally requested through a reporting mechanism, which often took weeks to go through. In addition, the sparse resources had to be shared amongst communities in the zone, and there were often shortages in quantity. As well, there was only one delivery vehicle used for all of the transport of emergency patients and delivery of supplies, and there was a limit for the amount of gas that was reimbursed per week. This meant that drivers often postponed deliveries of medicines until more had arrived in order to reduce the number of trips and stay within their gasoline allotment. *Angel, the regional IMSS supervisor, said that the doctors and other IMSS workers had to search for alternative funding and sources to keep the clinics stocked. In some cases this support comes from government, in others from NGOs. There is also medicine swapping between clinics and from hospitals in the attempt to better utilize the resources that are available; yet, this is not always a viable recourse, as most clinics are in the same situation.

The administrative burden and extra work required by program workers was also a point of concern for interviewees with the complex bureaucracy of program management leaving service providers and volunteers feeling overwhelmed. While underfunding clearly reduces the quality of services, it also increases the responsibilities

and administrative burden placed on program staff, and accessory workers like the doctors, nurses, teachers, and vocales. Both the doctor at the clinic in Esperanza and the regional supervisor said that they felt overwhelmed by the combination of patient care and the administrative side of the program that they are required to deal with. Angel discussed with me the list of reports that doctors and supervisors were required to compile and submit for the program, and said that as the program has expanded over the years the administrative burden continues to increase, but pay and support staff does not.

Similarly, teachers commented on the fact that there were additional burdens/requirements passed to them because of Oportunidades. Teachers are required to generate attendance reports and ostensibly pass these along to the director, or school administration to input the results into the online Oportunidades reporting modules. While the director of the school described this as his duty, teachers said they were often required to do the data input on their own. Both the teachers and the director described this task as complex and time consuming. Maestra Lupita, the teacher of the 2nd year group, told me that besides record keeping associated with attendance for the program, teachers are also required to deal with parents' questions about the educational component of the program. At times, Maestra Lupita said that she has accompanied families who had issues with Oportunidades into the city for appointments or inquiries. Teachers also maintain regular contact with parents regarding attendance and program requirements, calling them in for meetings when their children have surpassed the limit of allowable absences. The director also described similar program related activities including visits to the homes of students who had accumulated a high number of absences or who were otherwise in jeopardy of losing their funding.

The administrative demands do not just affect those involved in the provision on health and education services, but also on the volunteer *vocales* who work as program representatives in their communities. The *vocales* are responsible for answering questions that come from community members, checking on compliance, and generally facilitating the running of the program in their community. The most recent version of the program now also requires *vocales* to give workshops to beneficiaries on health, nutrition, social issues and general program logistics. When I asked the *vocales* in Esperanza why they decided to volunteer for the post, there was stifled laughter followed

by the comment from one of the more outspoken group members that the position is “voluntary, but somewhat forced”, followed by another round of laughter. In Esperanza, the *vocales* were chosen by a random draw and those who were chosen were then required to work in the position for a period of one year. In Los Desamparados, Doña Toña and Dona Queta act as a *vocales* as well; but, both said they had volunteered for the position upon prompting from community members. Both the *vocales* in Esperanza and Los Desamparados discussed the multitude of tasks they were responsible for. Doña Toña described the responsibility as “heavy” saying that *vocales* were required “to be on the move a lot” and that the post “takes away a lot of [her] time”. While using community members as on the ground contact points and representatives of the program may help to make enforcement more successful and efficient, it also places a weighty administrative burden on the *vocales*, most of whom are beneficiaries themselves. Another concern raised was the tensions that arise between community members and *vocales*, as community members have blamed *vocales* for issues they encounter with the program. Doña Toña gave an example of a case where 20 families from her neighbourhood were removed from the program. She said “with 19 I had no problem, but one came to me and threatened to kill me, to *kill* me, because of the removal from the program that the lady herself caused.”

The administrative burdens of the expanding program are being passed on to the volunteer vocals and health and education workers, who are expressing concern about both the amount of work required and about the tensions that arise from the power dynamic that the position creates. Oportunidades has expanded and continues to expand in terms of the number of beneficiaries. In June of 2013 the PRI government announced that it was suspending the re-certification process that accounted for the removal of over 500,000 families from the program in 2012, under the previous administration. The administration has also now guaranteed all beneficiaries the right to defend their cases before being removed from the program. From the speaking with participants and observing the conditions in the healthcare and educational components of the program it is apparent that program expansion has increased the administrative burden required of professionals, and that the schools and clinics are underfunded. The bulk of the increased funding has gone towards increasing the number of families who are included in the program, but not to improving the services that they are provided or

the support staff who work in these areas. For services that already have access, cost and quality issues, and staff who already seem to feel overwhelmed with the administrative requirements of the program, expansion could lead to an unsustainable program. As such, further expansion could undermine the stability and sustainability of the program, particularly if resources are not specifically dedicated to increasing administrative capacity and strength. Expansion could also augment the service provision issues identified with the healthcare and education systems if these services are not strengthened.

5.4. Access and Cost Issues

Apart from the service quality and administrative burdens, other issues that respondents raised in our interviews include limited access to services and additional costs associated with meeting conditions and effectively utilizing these services. Transportation costs were a salient concern for rural beneficiaries and in many cases was identified as the only factor preventing them from sending their children to high school. Children from Esperanza and Lázaro Cárdenas have to take public transportation to the nearest local high school, which is over an hour away. Besides the time commitment that this travel takes, it also implies an additional cost. Respondents noted that the cost for transportation from their community to the nearest local high school was approximately 60 pesos per day, per child. With the average daily wage topping out at 100 pesos a day, the costs incurred by sending their children to high school would be unsustainable for most of the families in the community, even with the additional financial support provided by Oportunidades. One of the Esperanza *vocales* said that there were very few students who went on to high school from the community, saying “even those who want to go, or who are very intelligent don’t go, even when their parents do everything possible”. Similarly participants identified the unofficial registration fees that parents were required to pay as additional costs associated with sending their children to school. In the rural schools families pay a monthly “registration fee” that was used to cover the basic maintenance of the school, as the government was not contributing financially to this upkeep. One of the *vocales* from Esperanza said “its difficult for me to pay the registration fees for middle school, elementary school, and pre-school. Actually, it’s our duty as parents to give our children an education, but its difficult,

you could say, because of the economy that one has”, highlighting the conflict between the desire to pursue education and the financial capacity to do so.

There are also other costs associated with education at all levels for both urban and rural beneficiaries. During the course of one of my observations the children were sent to the local corner store to buy their own supplies for an in class project. The teacher who I was observing, Ana Paulina, told me that it was common for students to have to buy additional supplies for in-class activities. While students were provided books free of charge, other supplementary materials, like dictionaries, were paid for out of the families' pockets. Families in Lázaro Cárdenas also joined together to request a computer teacher for the school. While the government had provided the school with several computers for their lab, they did not budget for an instructor. As such, families in the community decided to pay an instructor for their children from their own resources, and parents each pay seven pesos for one hour a week for each child. Other costs cited by respondents included uniforms, and graduation/special events related expenses.

In the urban school system, additional costs were also a common feature, although accessibility was not a major concern like it was in the rural communities. As asserted by Behrman et al, (2012) Oportunidades tends to be more successful in cities, as “impacts in urban areas might be expected to differ from those in rural areas, both because some features of the program changed and because access to schooling and health facilities as well as work opportunities differs.³⁰” In the neighbourhood of Los Desamparados, Doña Queta's children attended one of the top technical middle school/high schools: CBTis 108, as did Doña Toña who was trying to finish her schooling. CBTis was a short walk from the neighbourhood, and regular transportation was available for a few pesos for those who lived outside of walking distance. However, although it was easy to get to, CBTis 108 requires the payment of registration fees as well as fees for students to present exams in order to even be admitted to the school. Doña Toña, as an adult, said that despite her dream being to finish her high school education, she often felt that she could not afford to do so, because of the cost of the

³⁰ Jere R. Behrman, Jorge Gallardo-Garcia Susan W. Parker, Petra E. Todd and Viviana Velez-Grajales, “Are Conditional Cash Transfers Effective in Urban Areas? Evidence from Mexico”, PIER Working Paper 11-024, (Philadelphia: Penn Institute for Economic Research, 2011): 234.

courses and other expenses, saying “I take five courses, and fail three. Or I think about the effort and cost to buy my uniform. But sometimes I don’t have the money and I get frustrated”. While some children, including Doña Queta’s daughter, received scholarships to attend the school from the school itself, when I interviewed Lupita, the former school administrator for CBTis 108, she said that a number of students had been deregistered from the school due to non-payment; as such, they were unable to complete the requisites of the Oportunidades program, not due to lack of attendance, but because they had been deregistered because of failure to pay. This is an important piece of information, particularly in that it changes the dynamic of the process for removal from the program. While the program claims that attendance is necessary in order to continue receiving financial support, in fact the catch is that attendance, in this case is dependent upon the ability to pay the registration fees in the first place.

Much like the education system, the healthcare system (run through IMSS) available to Oportunidades recipients was problematic in a number of areas, including limited access and the presence of additional costs. While the clinic within the town did offer a point of contact with a medical practitioner, it was quite limited in scope, dealing with a prescribed list of medical tasks and no capacity for emergency medical situations. For tests, surgeries or specialist appointments residents of these communities had to travel into Comitán to access healthcare services. Additionally, beneficiaries in some communities had to travel to other clinics because doctor truancy was an issue. When I went to visit the IMSS/Oportunidades clinic in Lázaro Cárdenas, the nurse on duty, who looked frazzled and overwhelmed, informed me that the doctor would not be there until the 22nd (3 weeks from that time). When I enquired about this with the teachers who worked in the area they said that the doctor was often away from the clinic. The concern of doctor absenteeism was also raised by the regional supervisor, Angel who monitored clinic performance in the zone, saying that it had been an issue in some communities that doctors would not come to clinics. As a result, he said, patients are forced elsewhere, often to private clinics or hospitals that they have to pay for. Again, like the access issues associated with education in these communities, the access issues for healthcare also imply additional costs for beneficiaries, costs that are not considered in the program. Jose Antonio, the Oportunidades program representative in Comitán, brought up the fact that one of the program’s strengths is that it provides free healthcare

and education to beneficiaries saying “its free...they don't even spend a cent.”. Yet, as Angel explained there were often outside costs that prevented poor people from receiving the care they needed. He told me that because the clinic was very short on supplies, particularly medicine, patients often had to go elsewhere and buy their own medication or supplies or wait until medicine came into the clinic. He appeared frustrated by this, and showed me the medicine closet, which, as he promised, was bare. Doña Toña also described her experiences with medicine shortages saying:

We go with the doctor, and she does give the consultation, but she then gives us the prescription and we have to go into town to look for the medication. You go to the pharmacy and they tell you 'there's no medicine'. So sometimes you end up buying more, paying more. The medical consultation yes, it's free but, if you go and there's no medicine obviously we have to buy it and so we end up spending quite a lot.

When I told her about the supply shortages in the rural communities she responded, “ Yes. It's common everywhere”. Additionally, the healthcare component in the program is made more complex by the fact that Mexico has both a public and private healthcare system, with the private hospitals in the region perceived as being of better quality than the public hospitals and the small rural clinics. While IMSS does offer free healthcare, some poor people opt to pay for private healthcare based on the perception that it is of higher quality, or because of negative experiences with the level of care in the public institutions. Doña Toña discussed her long ordeal with public health services when her son was ill with liver disease:

I initially had him in the hospital [public hospital], which was paid for by the Seguro Social [state medical insurance] on behalf of Oportunidades. I had him in the hospital and they did all kinds of tests on him. I can't tell you that they didn't support us at all; there were some days they saw us and some they didn't. There was one night they had him there the whole night and did all kinds of tests but said there was nothing wrong. But his condition continued the same. He just lay there, didn't move, didn't talk, like he was dead. So I decided to take him to a private hospital, and there they said he had a liver problem and gave us medicine.

In the end, despite the fact that the healthcare offered through IMSS/Oportunidades was free, Doña Toña felt the quality of care was so poor that she had no choice but to go into

debt and pay for adequate care at a private hospital. While there were a number of private hospitals close to her, as she lives in the city, this is not the case for rural residents who often have no choice but to take the care they receive in their local clinics or to incur even greater expenses by temporarily relocating to the city while they are in treatment.

As evident in the interview data, beneficiaries' demands and desires are not in tension with the aims of the program, and recipients tend to buy into the importance of health and education services as means for improving human capital. Despite a superficial support for conditionality, the interviews reveal that the main motivating factors for utilizing services and investing in the accumulation of human capital are accessibility, quality and cost, and not the conditionality imposed by the program. While the injection of capital into poor households can help to address the issue of cost, it does not address accessibility or quality of services and instead acts as an unnecessary constraint. de Brauw and Hoddinott assert that the costs of CCT programs do not fall solely on the state, but that "meeting conditions imposes direct costs on beneficiaries." Because of these added costs they claim that "imposing conditions may detract from the effectiveness of the CCT's targeting."³¹ As a result, the question arises whether or not the imposition of conditions in the Oportunidades program is essential and effective, or if a Universal Cash Transfer (UCT) program would be a better alternative.

The theory behind the UCT sharply contrasts the culture of poverty theory, which underpins CCT programs. UCT programs are based on the assumption that the poor are rational actors, and that as a result conditions are unnecessary constraints. Schubert (2010) asserts that these assumptions "are closely monitored and have so far proved to be realistic" in the evaluation of UCT programs. Cash Transfer programs that do not have conditions attached to them have been successful because conditionality is not the key motivating factors for beneficiaries to utilize services, as evident in the interviews conducted for this research project. As suggested by the interviews in this study, access, cost and quality are more important in determining whether a beneficiary will utilize a service, and more importantly, whether using that service has tangible benefits that

³¹ De Brauw and Hoddinott, "Must CCTs be conditioned?", 361.

make up for the costs incurred. Another benefit of UCTs over CCTS is that UCTs are purported to overcome exclusion and inclusion errors associated with targeting and weaken patronage systems.³² While respondents in this research project reported that they were aware that the program was not associated with any political party, local patronage systems and personal connections, particularly in the rural communities, did play a role in who received the benefit and who did not. This was particularly evident in the fact that rural interview participants unanimously expressed concern over the interview process, asking repeatedly whether it would affect their status in the program. There was a clear sense of precariousness regarding their spot in the program, and this is likely related to the fact that all rural recipients who were interviewed requested anonymity. When asked how new beneficiaries enter the program I was told by the *vocales* in Esperanza that officially it is through a random draw; however, one respondent noted that “some people get into the program because they get along with the census taker”. By having a mechanism in which people can be removed or added to the program ostensibly based on compliance with conditions, CCT programs can be, and reportedly are, manipulated in order to serve existing patronage systems, whether political or personal. The interviews conducted in this project suggest that conditionality is an unnecessary constraint that can be used to create or strengthen patronage systems, rather than a motivating factor for behavioural conditioning, and support a growing body of research which critiques the imposition of conditions on social welfare programs as patronizing and ineffective.

³² Yanes, “Mexico’s Targeted”.

Chapter 6.

Conclusion

The beneficiaries interviewed in this project expressed a very nuanced and complex understanding of their own poverty and the factors that contribute to it. While this understanding became evident through our in-depth discussions, respondents also made contradictory claims regarding the program, at times echoing program rhetoric and ideas of cultural poverty, and other times making statements about the structural causes of poverty and program deficiencies that perpetuate inequality. Although most respondents initially expressed general satisfaction with the program, they also raised a number of issues that were impeding the effective delivery of services, and brought up structural causes of their poverty that the program failed to address. This ‘double-speak’ reflects the sense of precariousness that pervaded this project. Participants were wary of losing the benefit, and thus generally repeated the superficial claims made by the program itself when addressing Oportunidades directly, but were much more critical of program components when asked to speak indirectly about related issues such as the economy and the provision of services. Their actual experiences with poverty and the program itself reveal that beneficiaries tend to support the aims of the program and intrinsically value health and education. What prevents the program from running as effectively as it could is not the buy-in factor which conditionality is intended to address, but the fact that the program fails to address structural causes of poverty, as well as poor institutional quality and problems with service provision. As a result, there are three main implications that arise. Firstly, the state needs to address structural cause of poverty, as “CCT programmes like Oportunidades can only fully reach their development objectives and eliminate intergenerational poverty if they are coupled with employment generation, asset (such as land) distribution initiatives, and added subsidies/benefits for

the extreme poor.³³ Secondly, the proposed expansions to the program could prove to be problematic if not undertaken in conjunction with efforts to reduce the administrative burden placed on workers and improve institutional quality and service provision. Finally, because the main impediments to accumulating human capital through the use of health and education services are access and cost related, the imposition of conditions as part of the cash transfer scheme is not only unnecessary, but also constraining. While the program's longevity and statistical success practically guarantees its survival under the newly elected PRI government, potential changes in focus and scope of the program have already been initiated under the new administration and make further research into the program both timely and important. Although the scope of this project excludes specific recommendations for alternative program design, this is an area that should be further explored, based on an analysis of the program that takes into account both quantitative and qualitative data, and questions the theoretical underpinnings of the program, and its assumptions about poverty.

³³ UNDP, "Mexico: Scaling Up Progresa/Oportunidades- Conditional Cash Transfer Program", *Poverty Reduction: Scaling Up Local Innovations for Transformational Change*, (2011): 11-12.

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Appendix A.

Interview Respondents Table

Name /Pseudonym	Gender	Position in Program	Location of Interview
Arnulfo Flores Gordillo	M	Principal of Lázaro Cárdenas Telesecundaria	Lázaro Cárdenas
*Vocal Lazaro Cardenas	F	Vocal in Lázaro Cárdenas	Lázaro Cárdenas
Ana Paulina Ruiz Kanter	F	Intern Teacher in Lázaro Cárdenas Telesecundaria	Comitán and Lázaro Cárdenas
*Maestra Lupita	F	Teacher in Lázaro Cárdenas Telesecundaria	Lázaro Cárdenas
*Anonymous Vocal	F	Vocal in Esperanza	Esperanza
*Anonymous Vocal	F	Vocal in Esperanza	Esperanza
*Anonymous Vocal	F	Vocal in Esperanza	Esperanza
*Liliana	F	Vocal in Esperanza	Esperanza
*Erika	F	Vocal in Esperanza	Esperanza
*Anonymous Vocal	F	Vocal in Esperanza	Esperanza
*Anonymous Vocal	F	Vocal in Esperanza	Esperanza
*Anonymous Vocal	F	Vocal in Esperanza	Esperanza
Don Avelino	M	Beneficiary (Husband of Dona Queta)	Los Desamparados, Comitán
Doña Queta	F	Vocal in Los Desamparados, Comitán	Los Desamparados, Comitán
Maria Elena	F	Daughter of Dona Queta	Los Desamparados, Comitán
Doña Toña	F	Vocal in Los Desamparados, Comitán	Los Desamparados, Comitán
*Don Jorge	M	Father of Doña Toña	Los Desamparados, Comitán
*Dona Elsa	F	Mother of Doña Toña	Los Desamparados, Comitán
Dr. Miguel Angel Gonzalez	M	Regional Supervisor IMSS	Esperanza
Crecenciano Ramirez	M	Regional Promoter IMSS	Esperanza
Lupita Velasco Albores	F	CBTis School Administrator	Comitán

Appendix B.

General Interview Topics

- Role in the program
- How the program functions
- The role of conditions in the program
- Positives and negatives of the program
- How would you improve the program
- General info about the town and region, as well as personal details including family size, employment, educational background
- Causes of poverty in the area
- Values placed on health and education
- Experiences with health and education service provision