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# Social policies and redistribution in Brazil

Bernhard Leubolt

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# SOCIAL POLICIES AND REDISTRIBUTION IN BRAZIL

Bernhard Leubolt

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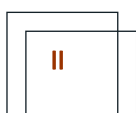
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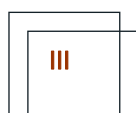
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## ABSTRACT

This paper aims at analyzing the contribution of social policies to declining rates of income inequalities in Brazil since the 1990s. Based on a framework of historical institutionalism, Brazil is characterised as a traditionally patrimonial society, marked by the institution of slavery. Important ruptures occurred during democratization in the 1980s, when social movements successfully fought for social rights which featured prominently in the democratic constitution of 1988. During the 1990s a contradictory confluence of these achievements and neoliberal reforms led to the promotion of “inclusive liberalism”. From the mid-2000s onwards policies began to shift in the direction of “developmental welfare”, combining active state interventionism in economic and social policies with targeted cash transfers. This combination avoided the pitfalls of “inclusive liberalism” and promoted a considerable reduction of social inequalities.



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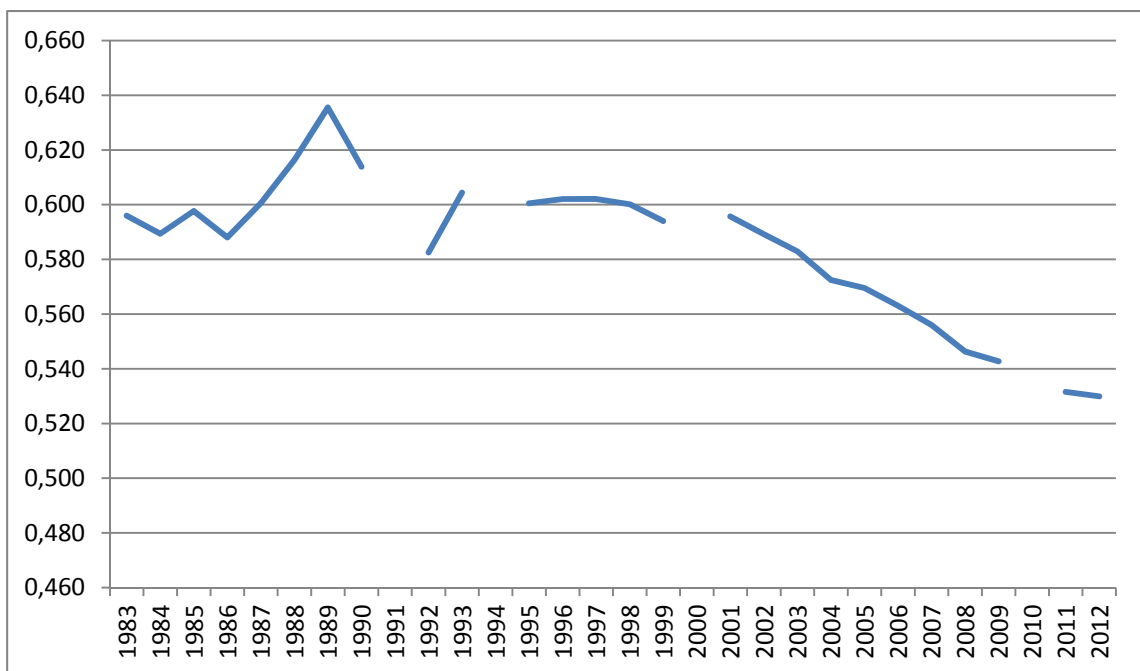
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## 1. INTRODUCTION

Brazil is internationally recognized as one of the countries with the highest social inequalities. Despite this, the country reports declining rates of income inequality since democratization at the end of the 1980s. As shown by graph 1, the Gini coefficient dropped from 0.636 in 1989 to 0.594 in 1999. The 2000s were marked by a further and considerably more pronounced decrease of the Gini coefficient to 0.530 in 2012. Despite the fact that the country is still characterized by remarkable inequalities, the recent Brazilian development moves opposite to the international trend of rising inequalities (OECD 2011).

Graph 1: Gini Coefficient, 1983-2012



Source: IPEA

This case study will analyse the contribution of social policies to the above mentioned trend of declining income inequality. It is conducted within the framework of a strategic-relational approach (Jessop 2007) towards historical institutionalism (Hall/Taylor 1996).<sup>1</sup> This approach especially emphasises the social agents involved, their strategies, and their achievements under institutionally mediated structural constraints and possibilities. In doing so, the “class mobilisation thesis” of Esping-Andersen (1990: 16ff.) earlier work will be adapted. Institutionalization is understood as an outcome of struggle (and as a structural condition for further conflicts) between different groups in society. Concerning the institutional dimension, the concept of the distributional regime (Seekings/Nattrass 2005) will be employed. It can be applied to a wider range of

<sup>1</sup> This article builds upon the findings of previous publications and partly includes them: Leubolt/Tittor 2008; Fischer/Leubolt 2012; Leubolt 2012; 2013a; 2013b.

policies other than Esping-Andersen's concept, as it rests on historical analysis and considers the interplay of the social situation with the political economy. Furthermore, the distributional regime approach has already been used to understand the distinct realities of the "Global South" (Seekings 2008). To understand the process of institutionalization, a historical analysis will form the basis for the study of current distributional policies in Brazil.

## 2. HISTORICAL BACKGROUND

Brazil abolished slavery only in 1888. Former slaves were denied access to land and thus the chance for self-sufficiency. They were therefore forced to sell their labour and often did so to their former owners at prices below the subsistence level (Novy 2001b: 91). Relationships based on personal dependencies between the slaves and their "masters" shaped the political landscape and also affected the rest of the population, albeit in a weaker fashion. The ever present power of the local patriarch was only limited by his personal dependency to the Royal Court. Therefore, Faoro (2001) described the Brazilian State as "patrimonial" based on Weber (1980: 580 et seqq.). Authority was characterized by personal dependencies instead of impersonal bureaucratically regulated social rights.

Social policy began under these circumstances and, in the beginning, could only be attributed to the tradition of philanthropy. Voluntary welfare provisions from slave owners and big landowners or religious organizations shaped this further. Social rights did not exist. The needy were dependent on their benefactors and had to prove themselves thankful and loyal. Apart from the slow and fragmented construction of a public school system, there was practically no state-run social policy, let alone social rights, until the 1920s (Pochmann 2007: 86 et seq.). Since then, patrimonial authority influenced Brazil and was only decisively modified in 1930 through a military coup and the following seizure of power by Getúlio Vargas, who could build an alliance with the emerging industrial bourgeoisie (against the big landowners who were dominant until then).

The new regime implemented a "modernisation from above" (Becker/Egler 1992; Fiori 1995). After the collapse in exports in the course of the world economic crisis, the government prioritised the domestic development. The state pushed for industrialisation and introduced far-reaching socio-structural changes. As a result, a relevant fraction of an industrial bourgeoisie emerged while a socially relevant industrial proletariat developed (Cardoso/Faletto 1976: 94 et seqq.). The industrial workers, who mostly migrated from Europe, were commonly organised in unions and influenced by socialism, anarchism or communism. They demanded higher wages and better working conditions, which they could reinforce through strikes. To prevent the possible endangerment of the regime<sup>2</sup>, the government integrated the industrial proletariat through the provision of

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<sup>2</sup> In 1935, the "National Liberation Alliance" (*Aliança Nacional Libertadora* – ANL) – a type of left-wing anti-fascist unity front – attempted a revolution, which was struck down after a short period of time by governmental and fascist paramilitary forces.



workers' rights. Additionally, a larger-scale and state-run social policy was initiated (D'Araujo 2003). After Vargas' proclamation of the semi-fascist *Estado Novo* in 1937, workers' rights, social policies, and authoritarian traits of the state were consolidated (Vianna 2003). Gramsci's concept of a "passive revolution" (Gramsci 1971: 106 et seq.; Vianna 2004) aptly describes the pertinent role of social policy. It does not primarily aim to reduce social inequality. It mostly contributes to the selective improvement of living conditions of those groups that are especially capable of articulating political demands like, the Brazilian industrial proletariat, and could potentially become "dangerous" to the regime. State intervention "from above" thus prevents revolutionary movements "from below". The state co-opts the "dangerous" groups, which leads to changes within the regime in the form of conservative modernization rather than revolutionary transformation.

Social welfare benefits such as the provision of housing or facilities for education and health care services were – in continuity with the previous stage – initially provided by employers. But in the 1930s, a distinct tendency towards the nationalisation of these provisions became apparent. Apart from the threat the industrial proletariat posed, the pressure from industrialists to socialise the costs of reproduction<sup>3</sup> was a decisive factor. In the course of this development, the tax basis of the Brazilian state increased and minimum wages, which the State defined (introduced in 1940), became gradually more important. Those social rights only applied to the formally employed – mostly male – urban, industrial proletariat while the informally employed and agricultural labourers (the overwhelming majority of the wage-dependent population as well as the majority of women) were excluded (Pochmann 2007: 90). The most important concessions for the industrial workforce were achieved via workers' rights starting in 1943 (*Consolidação das Leis do Trabalho* - CLT). These achievements had some authoritarian features, as unions were subordinated to the Ministry of Labour in concurrence with State corporatism. This in conjunction with a ban on autonomous union organising was an attempt to avoid conflict in industrial relations (D'Araujo 2003). The implicit role model for this development was the Prussian model of Bismarck, however, under rather patrimonial (as opposed to bureaucratic) conditions. The majority of marginalized people could not participate in the wealth produced within the framework of the "Prussian development path" (Fiori 1998). To them, the old patrimonial arrangements still widely applied. To illustrate, they could not insist on their social rights and instead were dependent on familial help or philanthropic care from landowners or the church. Barrientos (2004) labelled these traits as constitutive for an "informal" welfare regime, although the selective inclusion is typical for conservative regimes in Esping-Andersen's (1990) terms. Therefore, the historical Brazilian regime can be characterized as "conservative-informal" (Barrientos 2004).

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<sup>3</sup> Reproduction concerns the far reaching areas of biological human reproduction as well as the reproduction of labour. This encompasses areas such as birth, health, education etc. (Bakker & Silvey 2008).

At the beginning of the 1960s, social movements fighting for more radical change became stronger. In response to this, the more progressive oriented government of João Goulart proposed “grassroots reforms” (*reformas de base*) which comprised of a land reform and policies regarding the inclusion of the marginalized. This development led to a military coup in 1964, where civil society was supported by segments of the middle class, great landowners (*latifundistas*) and banking capital (Fiori 1995). Contrary to the development in Chile, the *dirigiste* “Prussian way” was carried out in a conservative authoritarian manner during Brazil’s military dictatorship. At that time, social policy was increasingly used to foster social cohesion and was even “universalised” to some extent. Marginalised people were still excluded from the agenda of social policies, but programs for the growing middle class were expanded. Social movements that requested (re)distribution were violently oppressed, consequently, social inequality did not decline. The *clientelistic* nature of distributional and social policy arrangements was upheld although they had been increasingly bureaucratized.

This system remained with small changes until the end of the military dictatorship in the 1980s. As a result, the welfare state is associated with a strongly developed structural heterogeneity. Clientelism and *patrimonialism* in rural areas coexisted with selective state corporatism in urban regions. Social movements demanding equal citizenship rights for all that fell under the banner of *Cidadania* (Alvarez et al. 1998) first emerged in the course of the democratisation movement. The demand for democratic participation was linked to the demand for social rights or social security (Dagnino 1994).

By the end of the 1970s. the resistance against the military dictatorship had grown during the hyperinflation and because of poor economic growth records. Various social movements occurred during this period, whereby the union movement in the metropolitan area of São Paulo was of particular importance. Also, the Independent Unions’ Association (CUT) was founded (in 1983) as well as the labour party (PT, in 1980) who demanded fair wages and working conditions as well as comprehensive social reforms. Oliveira (2006: 36), characterises these movements as imposing “moral leadership” in a *Gramscian* sense, meaning substantial opinion leadership. This predominance led eventually to the participation of various movements in the constitutional assembly in 1988, which marked “a high point in socio-political creative will” (Novy 2001a: 83). The constitution, which was created in a participatory way, had strong left-wing republican characteristics and aimed to progressively reconstruct the state mainly via the extension of citizen rights (*Cidadania*) and by simultaneously establishing a guarantee of social rights (Vianna 2006). The expansion of social rights cannot only be attributed to the rupture in the “critical juncture” (cf. Capoccia/Kelemen 2007) in the constitution, but should be viewed as a result of the continuous efforts made by the involved agents throughout (and also before) the military dictatorship: Falletti’s (2010) study on the Brazilian health care system showed that continuous efforts by doctors and nurses – organised with other civil society actors within the *movimento sanitário* (healthcare movement) – led to both

institutional reforms and to a shift of the discourse towards a more universalistic conception. As a result, healthcare reforms were among the most ambitious reforms in the Constitution of 1988. Thus, cultural hegemony of the left throughout the military dictatorship finally resulted in an important institutional rupture with the historical trajectory of Brazil's distributional regime.

Until the late 1980s, the distributional regime can be considered as a conservative welfare regime in Esping Andersen's (1990) typology. The workerist (Seekings 2008) focus on the formally employed led to the exclusion of the informal sector, so that the majority of the population remained excluded for most of the time. The stratifying character peculiar to conservative welfare regimes was especially distinct in the public pension system, which reproduced and fortified income inequalities. Between the 1930s and the 1980s, the Brazilian distributional regime had been formalised, as the state resumed more responsibility. Nevertheless, formalisation occurred only partially, as new social and workers' rights were mainly applied in the formal sector. Therefore, the regime was characterised as a "conservative-informal regime" (Barrientos 2004).

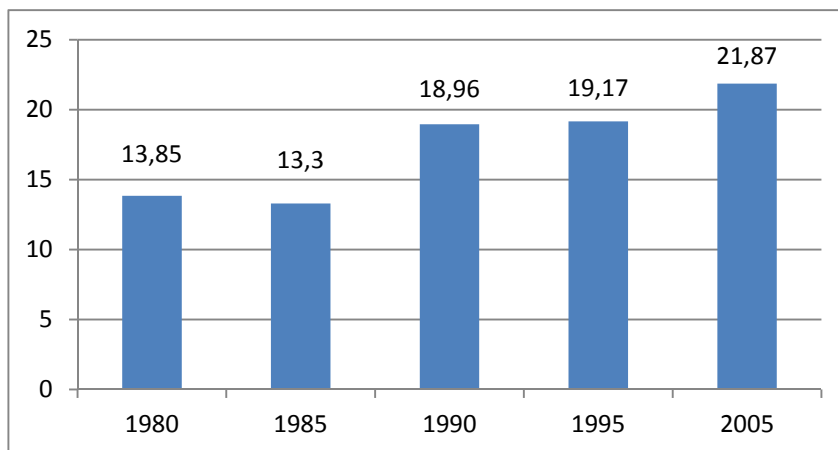
### **Brazil's Distributional Regime after Democratisation**

The Constitution of 1988 altered the trajectory of the Brazilian distributional regime. One of its key social policy achievements was the establishment of minimum standards of "social security" (cf. Delgado et al. 2009). This concept originated in Great Britain under Beveridge in the 1940s and was taken on by the International Labour Organisation (ILO) in 1952. In Brazil, it was seen as a counter-concept to the *Bismarckian* "social insurance" model, enabling the institutionalisation of a universalistic welfare regime: Education, pension and health care benefits as well as social transfers were universally available to all citizens in urban and rural areas. For the first time, the rural population was included into the welfare system, which has mainly been institutionalised via cash transfers. The Brazilian path to include the poor was different to the development of social welfare in Africa, which implemented a land reform in order to enable large groups of people, especially the poor, to care for their own reproduction (Seekings 2008: 26f.). In Brazil, the reform commission rejected the proposition for a land reform, despite popular support. Inclusion of the poor was therefore not done by enabling them to provide for their own subsistence, but by making social policies universally available. Contrary to social rights, workers' rights were not much expanded compared to the laws of the 1940s (cf. Pochmann 2008b).

The constitution can be viewed as an expression of a political equilibrium (or stalemate) between progressive and conservative forces. The presence of social issues can be interpreted as a consequence of the "cultural hegemony" the left obtained and fortified during the military dictatorship. The Workers' Party (PT) can be recognised as the most important political channel of progressive forces in these times, when it opted for radical transformation of society and its class relations (Amaral 2003; Oliveira 2006: 36; Singer 2012: 88ff.). Paradoxically, political support for the PT came mainly from upper income groups from the wealthier regions of the country (South, Southeast), while the majority of the

poor supported conservative political parties, as the majority of the poor were afraid that radical change could negatively affect them (Singer 2009; 2012). As a result, the first direct democratic presidential election was won by Fernando Collor de Mello, who was able to gather enough support from the poor with a conservative and populist project against the PT candidate Luiz Inácio Lula da Silva. Collor had to resign in 1992 due to an impeachment campaign that focused on corruption scandals in his presidency. Many movements behind the impeachment campaign (*Movimento pela Ética na Política*) formed an important national social movement against hunger and misery (*Ação da Cidadania contra a Fome, a Miséria e pela Vida*) in 1993. This further strengthened the national anti-poverty consensus. The next elected (after a brief interim period by Itamar Franco) president, Fernando Henrique Cardoso, directly represented the political stalemate between progressive and conservative people. The former leftist academic was politically backed by the conservatives. Neoliberal reforms and the fortification of poverty reduction strategies characterised his governments between 1995 and 2002 (Singer 2012).

**Graph 2: Social Spending as percentage of GDP, all 3 levels of government**

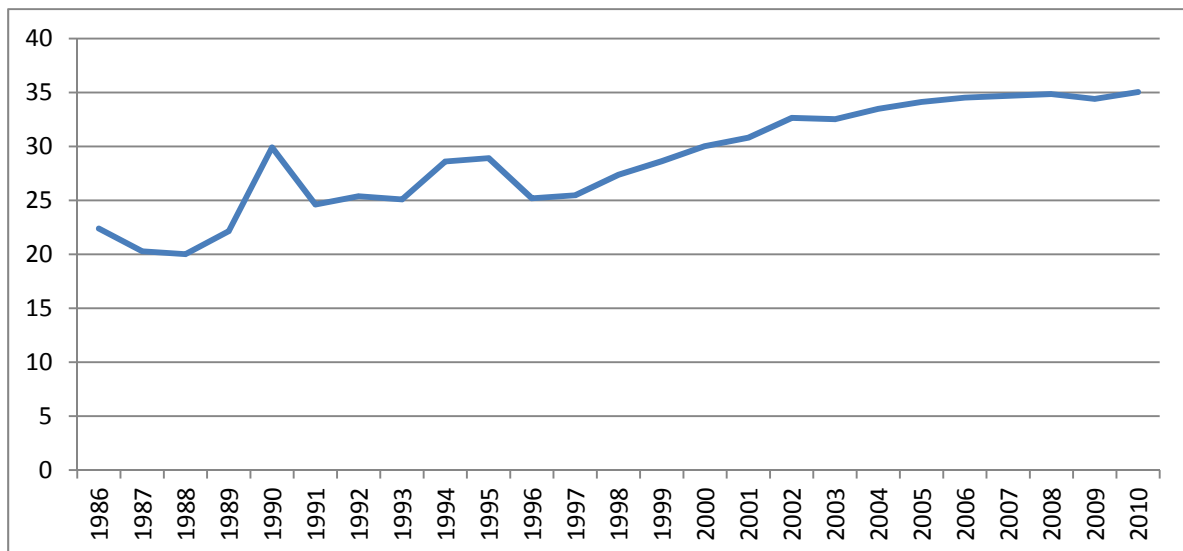


Source: Castro et al. 2009

Graph 2 illustrates the effects of the political equilibrium (and its institutional effects on the constitutional reforms and politics after democratisation) on social spending, which increased from 13.3% of GDP in 1985 to 18.96% of GDP in 1990. The universal social policy was designed to benefit as many people as possible and simultaneously was implemented democratically. To achieve this, the government established decentralized local councils each representing a different sector of social policies (*conselhos setoriais*) and integrated them as respective decision-making bodies into the constitution. These councils demonstrated a comprehensive amount of democratization for a state that was markedly patrimonial and authoritarian. At the same time, minimum investment requirements for education and health care institutions were embedded into the constitution via quotas. These widespread social reforms were even more remarkable than the international trend towards a neoliberal program of

retrenchment or a conservative restructuring of social policy. In contrast to this, the Brazilian constitution clearly moved towards a more egalitarian system, where previously excluded people were included. For example, the universal Unified Health Care System (SUS – *Sistema Único de Saúde*) abandoned the insurance-based health care system based on occupational status. Also, the constitution introduced a public minimum pension for agricultural labourers in the amount of the statutory minimum wage that was not dependent on contributions. Investments also increased for basic education during the administration of Cardoso, so that illiteracy declined from 18 percent in 1990 to 11.8 percent in 2002 (IPEA) as access to public schools improved dramatically. Those examples clearly show there was a general universalisation of social policy. Obligations tended to shift from the family to the state, especially concerning the hitherto excluded poor. These tendencies marked an important departure from the “conservative-informal” characteristics of the regime.

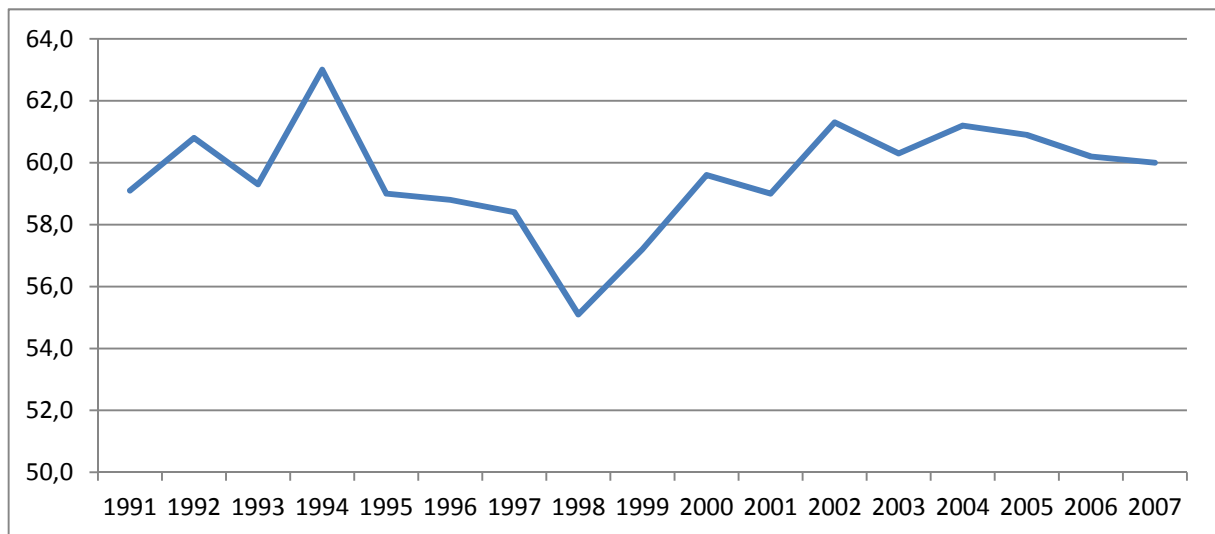
**Graph 3: Tax and contribution ratio (carga tributária) as percentage of GDP, 1986-2010**



Source: Amaral et al. 2011: 4

These dynamics in social policies created new needs for taxation, which were only partially met. Graph 3 above displays the development of the tax and contribution quota relative to GDP. This quota rose from 20 percent of GDP in 1988 to 29.9 percent of GDP in 1990. Then it dropped to 24.6 percent of GDP in 1991 and recovered very slowly afterwards. Furthermore, taxes have not been as much a subject to reform as government spending has. Graph 4 illustrates the quota of indirect taxes, which tend to be of a regressive nature. In Brazil, this quota oscillated between 55.1 percent in 1998 and 63 percent in 1994. Tax incidence analyses indicated that this high percentage was the result of disproportionately higher tax rates for the poor people in the country (Pochmann 2008a; Silveira 2008).

Graph 4: Indirect taxes as percentage of total taxes, 1991-2007



Source: Khair 2008: 12

At the same time the 1990s were the decade of neoliberal reforms in Brazil. It first began under president Collor de Mello in 1990 and took full effect in 1994 with the introduction of the *Plano Real* by then finance minister Cardoso (Fritz 2002). Liberal economists characterise Cardoso's program of inflation targeting as his most important socio-political measure because the population could not protect itself against inflation-related losses. The overvalued currency encouraged relatively low prices on imported durable consumer goods such as TVs, which have become much more accessible even in poorer districts. The downside to *Plano Real* was that it weakened domestic capital, which led to higher rates of unemployment. In addition to this, the policy of high interest rates had dire consequences for fiscal policy (Vernengo 2007). The debt servicing obligations increased dramatically – as a result, public debt rose from 32.2 percent of GDP in January, 1995 to 60.6 percent of GDP in December, 2002 during the Cardoso administration (IPEA). In order to meet those obligations, social funds were re-dedicated. This happened in particular after the big financial crisis in 1998/99 within the framework of the so-called "law for fiscal responsibility" (*Lei da Responsabilidade Fiscal*) and the law for the "re-dedication of federal funds" (*Desvinculação de Fundos da União, DRU*).

As an immediate consequence of the combined universalisation of social policy and the insufficient expansion of its funding, the quality of public sector services diminished. Within the field of education policy this became apparent through the low quality of basic education (IPEA 2005: 70 et seq.). Additionally, many people from the upper and middle classes moved out of the public system towards private schools, hospitals, and insurance systems. In 1990, 86.9 percent of the children from the richest 10 percent of the population went to public schools. The number went down to only 18.49 percent in 1998. Attendance of the richest 10 percent in health care sank from 15.95 to 3.46 percent during the same period (Ramos 2000). Such developments have been legitimized by the proclaimed

necessity of “social targeting”, where only the “deserving poor” should receive public support, whereas the “non-deserving” people should pay for the services they utilize. The “targeting paradigm” enjoyed legitimacy due to the patterns of social and political exclusion inherited from the past. It was used (besides references to the problem of financial feasibility), for example, as legitimation for Cardoso to reform the private sector pension system in 1998 – whereby the retirement age was increased and a maximum amount of benefits of R\$ 1.200, which has since been adjusted for inflation, was introduced. As part of the “targeting paradigm” benefits were reorganised as well. The Cardoso administration, for example, abolished the subsidisation of gas and instead introduced a monthly gas allowance for cooking purposes of R\$ 15 for the poor. In 2001, Cardoso additionally introduced the programs *Bolsa Escola* and *Bolsa-Alimentação*, which were comparable to a family allowance and provided a maximum amount of R\$ 45 a month for poor families. At least since then, a trend towards establishing state-run programs of “targeted” income transfers could be observed (Macêdo/Brito 2004). These changes were primarily responsible for the remarkable increase in spending for social assistance since 1995 (cf. Table 1) – in conjunction with the income transfer program geared towards designated groups with special needs (BPC – *Benefício de Prestação Continuada*), which was incorporated in the constitution in 1988 and regulated by the social assistance law LOAS (*Lei Orgânica da Assistência Social*; Sposati 2007) in 1996.

**Table 1: Social spending on different areas, in percent of total social expenditure, all 3 levels of government**

	1980	1985	1990	1995	2005
<b>Sanitation</b>	5.0	5.0	4.2	1.3	1.2
<b>Labour market policy</b>	0.3	0.3	5.1	2.2	2.9
<b>Social assistance</b>	1.6	1.7	2.3	2.1	4.8
<b>Housing</b>	13.4	8.8	7.2	7.3	3.8
<b>Health care</b>	16.9	16.4	16.5	16.1	15.2
<b>Education</b>	19.6	22.0	22.2	20.7	18.5
<b>Benefits to civil servants (Pensions)</b>	42.9	44.5	41.1	22.5	19.7
<b>Pensions</b>				26.0	32.0
<b>Other</b>	0.4	1.2	1.4	1.9	1.9

Source: Castro et al. 2009

Contrary to the focus on social rights, which was laid out in the constitution, the philanthropic tradition of Brazil's social system was revived via political programs under Cardoso. Aside from numerous public private partnerships in the health sector, the program "*Comunidade Solidária*" exemplifies this particularly well: Under the patronage of First Lady Ruth Cardoso, the state attempted to organise the civil society's willingness to help. This program intended, for example, to include voluntary social work in poor districts into the course requirements of universities (Mauriel 2006: 65 et seqq.). Another pillar of support was the so called *Corporate-Social-Responsibility* (CSR) – the social responsibility of businesses which is also used as tool in a marketing mix. Non-Governmental Organisations (NGOs), especially religious ones, played an important role since the 1990s, particularly in the area of social assistance (IPEA 2007: 88 et seq.). These reforms tended to shift social responsibility from the State towards families, communities, or the market.

The consequences of these policies on social inequalities were, on the one hand, the decline in extreme poverty and the improvement of corresponding indicators such as illiteracy rates, which caused the positive development of the Human Development Index. On the other hand, employment circumstances eroded – the informal sector grew from 53.6 percent in 1992 to 55.5 percent in 2002 and unemployment increased in the same period from 6.4 to 9.2 percent (ILO 2009: 2, Tab. 1). The functional distribution of income changed to the disadvantage of wage earners – the share of wages and salaries in total income decreased from 45.4 percent in 1990 to 36.1 percent in 2002 (Vernengo 2007: 87). The Gini coefficient stagnated on a high level and remained between 0.602 in 1996 and 0.589 in 2002 (IPEA).

The collection of reforms in social policy towards "targeting" and poverty reduction via neoliberal economic policy reforms in the "Cardoso era" is described as "inclusive liberalism" in the literature (see for example: Porter/Craig 2004), where liberal economic policy was accompanied by targeted measures of poverty reduction which were mainly implemented in cooperation with "socially responsible" corporations. Social rights were undermined in favour of hand-outs (Mkandawire 2005). This trend partially contradicts the constitution adopted in 1988, which was supposed to guarantee equal citizenship and social rights for all citizens under the banner of *Cidadania*. The focus to integrate the poorest more into society and to encourage greater political participation remained in place even though Universalist tendencies were subverted. The key features of the socio-political reforms such as the right to health care in the general health care system (*Sistema Único de Saúde* – SUS) remained unaffected in spite of continuous problems of lacking investments as described above. Consequently, Dagnino (2002) described this period as a "perverse mix between a participatory project which was constructed since the 1980s around the expansion of *Cidadania* and the deepening of democracy, and the project of a minimal state which relieves itself of its role as guarantor of rights" (Dagnino 2002: 288 et seq.; Transl. BL).



### 3. PT-LED GOVERNMENTS OF LULA AND DILMA ROUSSEFF BEGINNING IN 2003

Luiz Inácio Lula da Silva won the presidential elections and governed between 2003 and 2010. The next president, Dilma Rousseff has been his designated successor and roughly followed into the footsteps of Lula's agenda. Brazil's economic strategy only changed slightly until 2006, as orthodox liberal monetary policies continued. Since Lula's re-election in 2006, the role model for economic policies increasingly became the "developmental state", i.e. state driven capitalist development, which was mainly pursued by infrastructural investments (Novy 2008; 2012). Discursively, the notion of "*Cidadania*" re-emerged, visible in slogans such as "Brazil for all" and especially in the intensified pressure for poverty eradication.

Despite changes, discourse and politics have been marked by important continuities. At the height of his 2002 campaign, Lula sent a "letter to the Brazilian people", promising that economic policies would not be radically changed. This promise was mainly concerned with monetary policies, which should primarily target inflation control. On the one hand, the letter was a response to capital flight and to negative reactions by rating agencies to Lula's rise in the opinion polls, which generated a minor economic crisis in 2002 (Jensen/Schmith 2005). On the other hand, it also signalled to the poor that they did not have to fear adversary effects of economic turbulence due to radical reforms. Instead, Lula promised to emphasise poverty reduction in his political agenda. Thereby, he was able to attract enough voters, as for the first time (after three unsuccessful attempts) the poor voted for a left-wing candidate (Singer 2009; 2012). Thus, the electoral victory went hand in hand with a move to the political centre by Lula and the PT (Amaral 2003; Singer 2010; 2012).

#### 3.1 Expanding Cash Transfers as Cornerstone in Social Policies

When Lula took office in 2003, he made clear that the main task of the government would be the eradication of hunger. Initially the programme *Fome Zero* (zero hunger) was centre-stage, focussing mainly on cooperation with private actors. Soon the focus shifted to the expansion and to a better coordination of the "inherited" conditional cash transfer programs within the program *Bolsa Família* (family allowance, cf. Hall 2006). The program came to be the cornerstone of Lula's first term (Hunter/Power 2007; Singer 2009; 2012). *Bolsa Família* has been inspired by municipal cash transfer programs in Brasília, Campinas, Riberão Preto, and Santos. The local governments in those cities implemented similar cash transfer programs for poor families in 1995 (Silva e Silva et al. 2007: 48ff.). In regards to the coverage these programs differed from the social grants introduced by the constitution – poor families instead of only the elderly and disabled people were the target group. Also institutional requirements changed. For example, grants were subject to conditions in form of medical and/or school attendance of the children and payments received were

much lower than the minimum salary, the benchmark for the benefits introduced directly by the constitution.

On the national scale, a debate on a “minimal citizens’ income” was raised by senator Suplicy (2001) during the 1990s. In 2001, the Cardoso government introduced the first conditional cash transfer programs on a national scale (*Bolsa Escola*, *Bolsa Alimentação*), which transformed the former municipal programs into national programs. When the condition of school (*Bolsa Escola*) or medical attendance of their children was met, poor families were granted a small amount per child. Furthermore, the state subsidies for gas were replaced by modest cash transfers to the needy (*Auxílio Gás*) in 2002. Lula’s administration unified these programs into *Bolsa Família* and extended its coverage and its amounts transferred, both per recipient and overall. The program functions as income substitution or supplementation for poor families with variable amounts, depending on the number of children and their income situation. Compared with the hitherto existing cash transfer programs, the amount being paid has been substantially raised<sup>4</sup> and coverage extended to over 13 million families in 2012 (MDS 2012). Considering an average family size of four, the increased income due to *Bolsa Família* has effectively improved living conditions for more than 50 million poor Brazilians, i.e. around 25 percent of the population.<sup>5</sup>

As a result, this stratum of “sub-proletarians” turned into the new electoral basis for the emerging “Lulismo” (Singer 2009; 2012) which provoked debates on the nature of the cash transfer program. Is it a new form of assistentialism or clientelism or does it promote social rights to hitherto excluded people? The scalar arrangement is mainly between the central State government and municipalities, which have to distribute according to social criteria. Transfer works via a State owned bank, thus, preventing conventional clientelistic ties to local politicians. Nevertheless, municipal elections suggest that Lula’s resulting popularity in poor areas has often led to electoral victories for candidates of his party, giving rise to criticism of the assistentialist nature of Lula’s politics (Marques/Mendes 2007). Despite these criticisms, social assistance has been de-clientelized by bureaucratic procedures and the largely expanded coverage of *Bolsa Família*. Thereby, it contributed to the inclusion of formerly excluded poor people into the Brazilian welfare regime while avoiding clientelistic practices.

Another debate refers to the influence of *Bolsa Família* on the labour market. Some neoliberal and conservative, as well as radical left-wing critics emphasize that it creates perverse incentives to searching for employment on the labour market. Instead, a new dependency on State-financed “hand-outs” is argued to

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<sup>4</sup> According to the Brazilian Ministry of Social Development and Combat against Hunger (MDS 2012) extremely poor families could get up to R\$ 308,- per month in 2012, poor families up to R\$ 236,-. Eligible families (earning less than R\$ 140,- per capita) get R\$ 32 per child (up to a maximum of R\$ 160), R\$ 38 per adolescent between 16 and 17 (max. 2 adolescents), families earning less than R\$ 70,- per capita get an additional monthly payment of R\$ 70.

<sup>5</sup> Statistics for 2009 indicate that 12.37 million families covered by *Bolsa Família* led to the coverage of 22.2% of the Brazilian population (Soares et al. 2010, p. 34).

create a new “culture of dependence” (cf. Hall 2008: 814-816) – arguments which are reinforced by the above mentioned electoral consequences. Recent surveys on the matter report that the influences on the labour market are marginal. On the contrary, the general trend towards formalisation of labour relations is also reflected in recipients and former recipients of *Bolsa Família*, i.e. a growing number of registered recipients participated in the formal labour market between 2004 and 2007 (Leichsenring 2010). Another debate concentrates on the possible creation of a “reservation wage”, i.e. the lowest wage for which people are willing to accept jobs. This issue is complicated, as the minimum wage is determined by the State and has risen considerably, since Lula took office. There is evidence that the impacts on job-seeking are differentiated by gender: there is little impact on men, whereas women tend to be more discouraged (Teixeira 2010).

In accordance with Brazilian laws, *Bolsa Família* is paid to the “head of the family”, which is predominantly female by definition. Therefore, women have a bigger budget at their disposal, which is seen as a source of empowerment. Simultaneously, this reinforces the gender role of the “caring mother”, as *Bolsa Família* has been reported to raise the “reservation wage” for women. Most analysts tend to stress the empowering effects, while giving less emphasis on the detrimental effects on gender roles (Suárez et al. 2006; Tavares 2010).

*Bolsa Família* is generally considered to be a very successful program for poverty reduction (Seekings 2012). To conduct an analysis of its distributive effects, it will now be analysed as part of the Brazilian distributional regime.

### **3.2 Continuities and Ruptures in the Brazilian Distributional Regime**

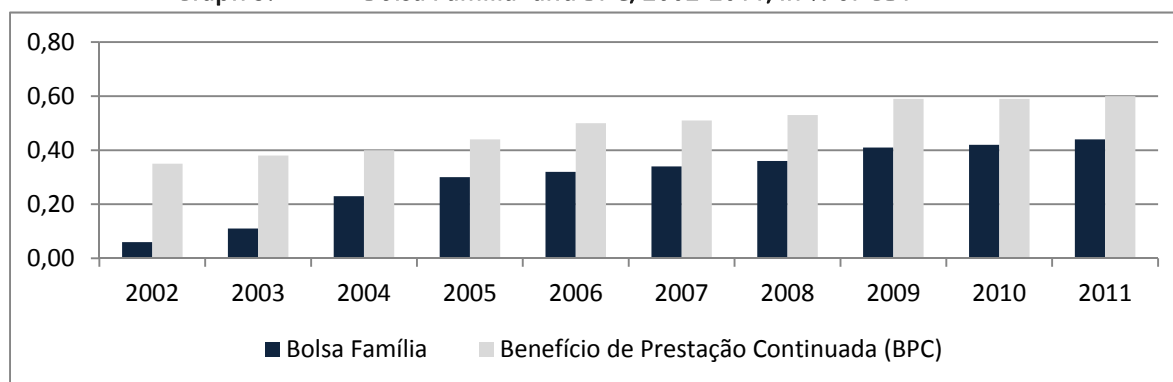
The investigation of social spending by the Brazilian government will form the basis for an analysis of the Brazilian distributional regime. The data presented in table 2 differs in an important aspect from the data presented in graph 1 and table 1: Whereas the latter refer to all three levels of government (municipal, provincial and federal levels), table 2 only covers social spending by the federal government. Due to the effects of decentralization, some areas of social spending, such as basic education and healthcare, remain excluded because they have been decentralized since the adoption of the constitution in 1988. Nevertheless, the data presented in table 2 shows the most important sources of Brazilian social spending.

**Table 2: Social Spending by the federal government, in % of GDP**

Social Spending	1995	2000	2005	2006	2007	2008	2009
Food	0.11	0.11	0.08	0.09	0.08	0.07	0.09
Social Assistance	0.08	0.40	0.83	0.91	0.93	0.97	1.08
Social Spending for Public Officials	2.46	2.47	2.29	2.25	2.23	2.18	2.37
Culture	0.03	0.02	0.03	0.03	0.03	0.03	0.04
Agricultural Development	0.16	0.15	0.17	0.20	0.20	0.17	0.17
Education	0.95	0.87	0.77	0.81	0.88	0.88	1.03
Employment Policies	0.53	0.52	0.59	0.69	0.74	0.74	0.91
Housing	0.11	0.43	0.39	0.40	0.41	0.56	0.77
Pensions	4.98	5.77	7.00	7.20	7.04	6.78	7.28
Sewage	0.03	0.11	0.08	0.09	0.18	0.16	0.21
Health	1.79	1.70	1.59	1.68	1.66	1.63	1.85
<i>Total</i>	<i>11.24</i>	<i>12.56</i>	<i>13.82</i>	<i>14.35</i>	<i>14.38</i>	<i>14.19</i>	<i>15.80</i>

Source: IPEA 2011: 12

Table 2 confirms the diagnosis of the rising importance of cash transfers. The first big program introduced was already part of the constitutional reforms of 1988, but were only enacted in 1996: The *Benefício de Prestação Continuada* (BPC) is an unconditional cash transfer geared towards the elderly poor and people with disabilities. Contrary to *Bolsa Família*, the paid amount of BPC is directly linked to the minimum salary. Although this amount is considerably higher than the amounts paid within the *Bolsa Família* program, more money is spent on BPC (cf. graph 4).

**Graph 5: *Bolsa Família*<sup>6</sup> and BPC, 2002-2011, in % of GDP**

Source: IPEA 2012: 3

<sup>6</sup> Data for *Bolsa Família* in 2002 and 2003 concerns the preceding cash transfer programs.

Programmes in the field of social assistance are generally viewed as being remarkably “pro poor” and thereby contribute to diminishing wage inequalities. Nevertheless, the rising minimum wage, along with rising average wages and the formalisation of employment relations are viewed as bigger contributors to the reduction of wage inequalities (Hoffmann 2005). In a recent analysis of public and private income transfers, Medeiros and Souza (2013) conclude that transfers in the field of social assistance are the only form of progressive “pro poor” public spending, while other transfers – mainly wages and pensions of public employees – are being considerably more regressive than wages and pensions in the private sector (excluding profits from financial assets, e.g. from public bonds). While Medeiros and Souza (2013) come to the conclusion, that the state thereby contributes to the (re-)production of inequalities, their analysis is modified by taking social services into account.

Table 2 shows that investment rates in social services such as education and healthcare declined between 1995 and 2005. From 2006 onwards, this trend reversed and new investments were channelled into these sectors. As indicated above, public healthcare is mainly used by the poor. Education policies have also been increasingly geared towards the poor. Since 2002, the universalist focus of education policies has been fortified by new public investments in higher education, while quota-based affirmative action policies opened universities for disadvantaged segments of the population (Maggie/Fry 2004; Corbucci et al. 2009). Considering care services, the conservative character of the Brazilian system – hardly providing public child, and elderly-care facilities – has only been marginally challenged while poor families are now publicly supported by cash transfers to provide for childcare.

Public investments in infrastructure (sewage and housing) have also risen considerably since 2005. These rising investment are mainly the results of the program for economic growth (PAC), which was coordinated by Dilma Rousseff from the beginning of 2007 onwards. Contrary to other comparable programs that are geared towards the promotion of a “developmental state”, PAC focuses heavily on social infrastructure in deprived neighbourhoods – particularly housing and sewage. Furthermore, the state dramatically increased investments in employment policies from 0.59 percent in 2005 to 0.91 percent in 2009. These investments are supported by a Keynesian discourse of “economic growth through redistribution”, which can be seen as central to the Brazilian approach to politics, fortified after the election of Dilma Rousseff in 2010 (Leubolt 2013a).

Together with the State’s influence on labour market policies, the conclusion of Medeiros and Souza (2013) on the regressive nature of government spending can be challenged. as the recent rise of state revenues has been accompanied by a significant reduction of wage inequalities. The indirect impact of public services and infrastructure cannot directly be measured. However, it can be assumed that it contributed positively to the reduction of inequalities. The opposite can be stated on a source of income transfers, which is complicated to measure, and therefore has been left out of Medeiros’ and Souza’s analysis: income transfers to

holders of government bonds tend to be of a highly regressive nature (Medeiros/Souza 2013: 28). Table 3 shows that government payments for debt servicing obligations rose significantly to 8.51 percent of GDP – a considerably high amount which only gradually declined during the 2000s. In 2005, federal social expenditure totalled to 13.82 percent of GDP (cf. table 2). If pension payments (7 percent of GDP) are subtracted from this, the remaining federal social expenditure of 6.82 percent of GDP was actually below the amount paid for debt servicing obligations of 7.37 percent of GDP. Efforts to repay debts, combined with positive economic development improved the ratio between social spending and debt service payments significantly.

**Table 3: Federal budget: primary surplus, debts and deficit, 2002-2011, in percent of GDP**

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
<b>Primary surplus</b>	3.22	3.27	3.72	3.79	3.20	3.31	3.42	2.00	2.70	3.11
<b>Debt service</b>	7.67	8.51	6.62	7.37	6.83	6.11	5.46	5.28	5.18	5.72
<b>Final deficit</b>	-4.45	-5.24	-2.90	-3.58	-3.63	-2.80	-2.04	-3.28	-2.48	-2.61

Source: BCB 2012: 10<sup>7</sup>

It is difficult to analyse Brazil's total federal budget, as financial management distorts the figures. The continuing costs for refinancing debts are cumulative and thus, the estimated costs of debt management do not correspond with actual payments for debt servicing obligations. Nevertheless, the latter costs have become very important after the debt crisis in the 1980s and the calculations in table 3 are as accurate as they can get. The Brazilian debate on the comparative importance of social spending mostly revolves around the "primary surplus", i.e. the budget surplus without debt service. Many observers (Fagnani 2005; Filgueiras/Gonçalves 2007; Marques/Mendes 2007) criticise those government policies designed to maintain a substantial "primary surplus", as they limit possible social spending. Since the upkeep of a "primary surplus" is among the key requirements of The World Bank and the International Monetary Fund, it is commonly associated with the "Washington Consensus" and neoliberalism. Aside from these arguments, the author of this paper argues that the maintenance of a primary surplus can also be used to reduce government debts and consequently lower payments for debt service (Leubolt 2013b). This corresponds to the Brazilian case, where the high interest rates on government bonds contribute substantially to the regressive nature of debt servicing costs favouring financial

<sup>7</sup> The data presented in table 3 corresponds to the renewed methodology of the Brazilian Central Bank. Data derived from older reports was collected using a different methodology and is therefore not directly comparable. It indicates that payments for debt service were highest in 2003. Before, a steady rise in payments for debt service can be observed, especially from the financial crisis in 1998 onwards.

capital. Therefore, a reduction of respective payments contributes to a progressive transformation of Brazilian fiscal policies, as can be seen in table 3.

### 3.3 Political forces, discourse, and welfare policies

The administrations led by Lula and Dilma Rousseff did not only gradually change the distributional regime, but also had an impact on the correlations of forces. Generally, it is important to note that – after a difficult first year in 2003 – the economic conjuncture was positive. Rising prices of commodities benefitted the respective industries, which are still important to the Brazilian economy. Between 2004 and 2008, the gross domestic product grew comparably fast (between 3.16 percent in 2005 and 6.09 percent in 2007). The main beneficiaries of economic success were the poor, which generated a virtuous circle through the amplification of mass production. This led to the expansion of the (lower) middle classes, while the incomes of the upper middle classes stagnated (Pochmann 2012).

Besides their relative economic stagnation, members of the upper middle classes were also alienated by the *mensalão* scandal, where the government systematically bought the votes of deputies with public money, which had been illegally transferred to the PT (Anderson 2011). The media reacted with wide coverage of this corruption scandal, which destroyed the image of the PT as the only non-corrupt party with integrity (Sader 2012). As a result, the PT lost much of its support within the middle classes, while it gained many new supporters among the poor and marginalised (Singer 2012) and maintained its support among the organised working class (represented by the biggest trade union association CUT, which was integrated into the government; cf. Boito Jr. et al. 2009; Jardim 2009).

Nevertheless, the PT-led administrations have been organized as coalition governments integrating a wide variety of political forces – also in the field of welfare politics. The majority of actors can be identified as part of the “anti-poverty consensus” which matured in the 1990s, albeit with different conceptions. Business representatives (e.g. organized within the Federation of Industrialists of the state of São Paulo FIESP) tend to opt for Corporate Social Responsibility and favour to assign a minimalist role to the state. This corresponds well with the “inclusive liberal” fraction, which prefers “pro poor” social spending, as laid out by the governments of Cardoso. The State should focus solely on the poor, while the better-off should provide their services themselves. Besides Cardoso’s party PSDB, this fraction is also influential within the centrist party PMDB (PT’s main coalition partner).<sup>8</sup> The discourse of “inclusive liberalism” is rather strong among the rich and among segments of the middle classes – partially as a result of their exit from public services during the 1990s. Having paid

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<sup>8</sup> It is difficult to translate and characterise Brazilian political parties. PSDB stands for “Brazilian social-democratic party” (*Partido da Social Democracia Brasileira*), but is now associated with the centre-right. The centrist PMDB (*Partido do Movimento Democrático Brasileiro*) is the party originating out of the official opposition to the military regime.

for private providers and insurance schemes, they want to benefit from their investments. In contrast, the majority within PT (along with some fractions within PMDB) has traditionally opted for a stance which is more aligned with government actions in the tradition of social democracy. Increased social spending should aim at including new groups, while the quality of existing services should be retained or even enhanced. Service provision should be universalised and thereby create societal solidarity and a new culture of social rights (social citizenship). The corresponding discourse of “developmental welfare” can build upon the discourse of *cidadania*, which was dominant during the drafting of the Constitution of 1988.

Critics of the “anti-poverty consensus” exist on both sides of the political spectrum. Both argue that State-financed social policies create a “culture of dependency” among the poor recipients. Conservative critics argue the programs such as *Bolsa Família* foster idleness by increasing the “reservation wage”, while creating little incentives to search for work on the labour market. A government introducing new social policy programs is viewed to be “populist”, as it creates dependencies for the poor. This view is often linked to conservative prejudice concerning the possible role of the poor in society who are seen as under-educated and should therefore be excluded from politics and society (Kehl 2010). In public discourse, this is normally not expressed as explicitly and is often connected with the “inclusive liberal” discourse. Left-wing radicals (e.g. organised in the party *Partido Socialismo e Liberdade* – PSOL) also tend to stress the arguments on “populism” and the “culture of dependency”. In their regard, this fosters passivity and can be seen as a continuation of assistentialist and clientelist modes of governing.

Despite these criticisms, the times since Brazil’s democratisation have been marked by the consolidation of an “anti-poverty consensus”. The main difference between the 1990s and the 2000s was the declining importance of “inclusive liberalism”, which is still an important discourse in politics and society, while a social-democrat interpretation of “developmental welfare” enjoyed rising popularity. This was favoured by the economic conjuncture permitting relative gains by the poor without absolute redistribution. In times of more troublesome economic development, this strategy will hardly be viable anymore (Sicsú 2013).

## 4. CONCLUDING REFLECTIONS

Summing up, recent reforms of the Brazilian distributional regime led to a further decline of the “conservative-informal” characteristics (Barrientos 2004). The traditional workerist focus has been challenged by pauperist reforms, which have hardly any agrarian focus (Seekings 2008), as plans for land reform have been stagnating since the beginning of the 1990s (Fernandes 2010). Instead, an interesting dynamic can be observed. Pauperist reforms have been working against the highly exclusionary tendencies, inherent in the conservatism of Brazil’s workerist distributional regime. During the 1990s, the pauperist focus was accompanied by decreasing universalism, as large parts of the middle classes



were fleeing from the public into the private system. Nevertheless, the inclusion of the marginalized can be viewed as a universalising tendency, albeit not in the tradition of the European social-democracy – as outlined by Esping-Andersen (1990; cf. Mkandawire 2005), but rather as an inclusion of the hitherto excluded parts of the population. Thereby, coverage of social policies has been largely expanded. Whether this form of inclusion will strengthen solidarity between the middle classes and the lately included groups remains to be seen.

The 2000s were marked by diminishing inequalities. The main impact factors were better employment conditions for the poorer segments of the population and a remarkable expansion of cash transfers. In the Brazilian case, this expansion was accompanied by a slight diminish in social services and infrastructure until 2005. This trend corresponds to neoliberal concepts of social policies (Friedman/Friedman 2002) and can be characterised as a “monetarisation” of social policies (Fischer/Leubolt 2012). From 2006 onwards, the trend towards “monetarisation” has been reversed, as investments in social services and infrastructure have been raised considerably. The overall strategy shifted from “inclusive liberalism” to “developmental welfare”, where the reduction of inequalities through state-induced measures is viewed as an important factor to elevate consumption levels and thereby boost economic growth (Leubolt 2013a).

A Keynesian version of a republican discourse – centred on political and social citizenship rights (*cidadania*; cf. Dagnino 2003) and the universalist notion of a “Brazil for everybody” gained momentum vis á vis the formerly dominant “inclusive liberal” discourse of a necessary reorientation of public policies towards the “deserving poor”, while the “non-deserving” should provide for themselves (via community-, family-help or the market). The poor majority of the Brazilian population turned out to be of decisive political importance, albeit not as an active participant, but rather as beneficiary of politics and the decisive part of the electorate. The “inclusive liberal” coalition behind the government of Cardoso and the liberal Social Democratic Party (PSDB) could sustain itself due to positive impacts of inflation targeting on the poor and targeted social policies. After the economic crises in 1998/99 and 2002, the “developmental” discursive coalition behind Lula and the Workers’ Party (PT) gained strength. The crucial support by the poor and the growing “new middle classes” (Bomeny 2011; Pochmann 2012) was secured by the expansion of cash transfers and positive impacts of employment policies.

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