

Gendered risks, poverty and vulnerability in Mexico

Contributions of the *Estancias Infantiles para Apoyar a Madres Trabajadoras* programme

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* Disclaimer: The views presented in this paper are those of the authors and do not necessarily represent the views of DFID.

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List of acronyms and definition of terms used

ART	Antiretroviral Therapy
ASF	Federal Auditing Body
CEDAW	Convention for the Elimination of All forms of Discrimination Against Women
CNEGSR	National Centre for Gender Equity and Reproductive Health
CONAPO	National Population Council
CONAPRED	National Council for the Prevention of Discrimination
CONEVAL	National Council for the Evaluation of Social Development Policy
CPRC	Chronic Poverty Research Centre
DFID	UK Department for International Development
DIF	National System for Family Development
ECLAC	Economic Commission for Latin America and the Caribbean
ENDIREH	National Survey on the Dynamics of Relations within Households
ENIGH	Income and Expenditure Household Survey
ENOE	National Survey of Occupation and Employment
ENUT	National Survey of Time Use
FGD	Focus Group Discussion
FOMMUR	Microfinance Fund for Rural Women
FONAES	National Fund to Support Social Enterprises
GDI	Gender-Related Development Index
GDP	Gross Domestic Product
IFPRI	International Food Policy Research Institute
IMF	International Monetary Fund
IMSS	Mexican Institute of Social Security
INDESOL	Institute for Social Development
INEGI	National Institute of Statistics and Geography
INMUJERES	National Women's Institute
INSP	National Institute of Public Health
ISSSTE	Institute of Social Security Serving the Workers of the State
NAFIN	National Development Bank
NAFTA	North American Free Trade Agreement
NDP	National Development Plan
NGO	Non-Governmental Organisation
OECD	Organisation for Economic Co-operation and Development
PEC	Programme for Quality Schools
PET	Temporary Employment Programme
PISA	Programme for International Student Assessment
<i>Procampo</i>	Programme of Direct Support to Farmers
<i>Proigualdad</i>	Programme for Equality between Women and Men
<i>Promajoven</i>	Programme of Scholarships for Young Mothers and Pregnant Young Women
<i>Pronafim</i>	National Programme to Finance Micro-Enterprise
<i>Pronabes</i>	National Programme of Scholarships and Financing for Higher Education
SAGARPA	Federal Ministry of Agriculture, Livestock, Rural Development, Fisheries and Food
SCT	Federal Ministry of Communications and Transport
SEDENA	Federal Ministry of Defence
SEDESOL	Federal Ministry of Social Development
SEMAR	Federal Ministry of the Navy
SEMARNAT	Federal Ministry of Environment and Natural Resources
SEP	Federal Ministry of Public Education
STPS	Federal Ministry of Labour and Social Security
SFP	Federal Comptroller Secretariat

SHCP	Secretariat of Finance and Public Credit
SINAIS	National Health Information System
UK	United Kingdom
UN	United Nations
UNDP	UN Development Programme
UNIFEM	UN Development Fund for Women
US	United States
WHO	World Health Organization
<i>70 y Mas</i>	Unconditional cash transfer programme for senior citizens
<i>Chile Crece Contigo</i>	Public crèches in Chile
<i>Estancias Infantiles para Apoyar a Madres Trabajadoras</i>	Child Care Services to Support Working Mothers
<i>Oportunidades</i>	Cash transfer programme
<i>Pemex</i>	The state oil company
<i>Seguro Popular</i>	Social health insurance programme to fill the health insurance coverage gap left by social security
<i>Progresa</i>	Cash transfer programme (renamed <i>Oportunidades</i> in 2002)
<i>Vivir Mejor</i>	Document that articulates the federal government's social policy

Executive summary

The importance of social protection has become increasingly recognised in recent years, especially in the wake of the recent food price and global economic crises, but there has been little attention to the role that gender plays in the implementation and effectiveness of social protection programmes. It is often assumed that gender is already being addressed in social protection initiatives because many cash or asset transfer programmes and public works schemes target women, drawing on evidence that women are more likely to invest additional income in family well-being. The role that gender relations play in social protection effectiveness is, however, likely to be more complex. Gender norms and dynamics may affect the type of risk that is tackled, the choice of social protection modality implemented, awareness-raising approaches, public buy-in to social safety net programmes and, most importantly, programme outcomes.

In Mexico, formal social protection interventions have been in place for several decades. The formal social security system provides social protection to approximately 50% of the population – those who are formally employed either in the private sector or by the government. Nevertheless, more than half of the population, working in agriculture, self-employed or in the informal sector, remains without coverage. Most of the poor work in agriculture or are informally employed. A range of social protection programmes have been developed in the past decade to contribute to poverty reduction by helping various vulnerable groups without access to formal security cope with risks as well as contributing to their human development. Currently, social protection actions are framed in the country's National Development Plan (NDP) (2007-2012). Its accompanying social policy strategy, *Vivir Mejor* (Live Better) includes social protection interventions aimed at promoting more equitable access to basic services, stimulating work/income-generating opportunities and contributing to poverty reduction.

The focus of this report is one specific social protection programme introduced in 2007, the *Estancias Infantiles para Apoyar a Madres Trabajadoras* (Child Care Services for Working Mothers). This is a subsidised childcare services programme targeted at mothers in poor households (below a threshold of poverty of 1.5 minimum wages per household member) who work, are looking for work or are studying and do not have access to formal social security-provided childcare. It is implemented by the Federal Ministry of Social Development (SEDESOL) through its delegations in each of the 32 states, with support from the National System for Family Development (DIF). In three years of operation, it has reached 241,019 beneficiaries in 8,923 centres. Although primarily benefiting mothers, it has expanded to target poor, single fathers who are responsible for the care of their children. The programme was designed with the gender-responsive objective of supporting women's equal access to paid employment opportunities and higher levels of schooling, and building their capacity to lift themselves out of poverty and develop their capabilities in a more equitable manner. The programme's rapid expansion has underscored the gap that existed in this type of support for women. Evaluations of the programme have so far provided evidence of beneficiaries' satisfaction, as well as their greater access to more stable jobs.

Methodology: This report is part of a broader programme of work funded by the UK Department for International Development (DFID) on Gender and Social Protection Effectiveness, undertaken in Africa, Asia and Latin America. The research methodology used was primarily qualitative, with primary research undertaken in two localities, one in each of two districts in Mexico's San Luis Potosi, which is classified as having a high level of marginalisation and ranks sixth most marginalised/less socially developed among the country's 32 states. Sites were selected using a purposive matched sampling technique: choosing two municipalities with a similar poverty ranking, of neither transient nor extreme poverty (approximately 'middling poor'), using 2005 data from the National Population Council (CONAPO) and the National Council for the Evaluation of Social Development Policy (CONEVAL).

Gendered risks and vulnerabilities: To date, social protection policies and programming have paid greater attention to economic risks and vulnerability – such as income and consumption shocks and stresses – than to social risks. However, social risks – such as gender inequality, social discrimination, unequal distributions of resources and power at the intra-household level and limited citizenship – are often just as, if not more, important, in pushing households into poverty and keeping them there. In Mexico, there are geographical variations and a rural-urban divide in terms of the nature and intensity of economic risks and vulnerabilities. There is also a feminisation of poverty, as indicated by: a larger share of women below the poverty line; women's lower levels of post-primary education and lower literacy rates among older women; and greater risks of acquiring some chronic diseases, particularly diabetes (one of the two greatest causes of death in Mexico). Women are overrepresented in the informal sector, often in precarious conditions, and a significant wage differential remains between men and women (also in the formal sector). Adolescent women are particularly vulnerable: their above average pregnancy rate (most of which is unplanned) often leaves them with little social support, low levels of education and an inability to continue studying, trapped in precarious jobs to sustain themselves and their children. Women also face greater time poverty, dedicating more than three times more time to domestic and care work than men, even when they have paid work outside the home.

Many of these economic risks and vulnerabilities are reinforced or exacerbated by gendered social institutions and practices. On the one hand, there has been considerable progress in terms of legislation and policy to guarantee gender equality over the past two decades, including the Federal Law on Equality between Women and Men, enacted in 2006, and the Programme for Equality between Women and Men (*Proigualdad*), launched in 2008. On the other hand, traditional practices and social norms continue to undermine girls' and women's economic and social empowerment and their autonomy. There is evidence of continuing unequal intra-household gender relations, including women's limited say over their time use and, in some cases, gender-based violence. In particular, females are still regarded as responsible for domestic and care roles regardless of levels of education and participation in the workforce, leading to a 'triple burden.'

Social protection responses to gender vulnerabilities: Important progress has been achieved in terms of mainstreaming gender into policy discourse and in the design of public policies in a range of sectors. In the NDP, the promotion of gender equality is underpinned by Axis 3 Equal Opportunities, which has the explicit objective of eliminating any form of gender-based discrimination and guaranteeing equal opportunities for men and women to develop and exercise their rights. Strategy 3.5 of the NDP expresses a commitment 'to promote actions to foster a life without violence or discrimination and an authentic culture of equality by mainstreaming a gender perspective into all the Federal's Government's policies.' Although there are specific gender elements across other strategic objectives of the NDP, its gender perspective is more clearly articulated by *Proigualdad*. This is a specific programme framed under the NDP to guarantee the gender responsiveness of the federal government's actions. Despite advances made, challenges remain in more effectively integrating a gender perspective into policy design and implementation. There is still limited understanding of gender among many policymakers, which results in inadequately informed policy design.

Among the gender-responsive programmes that have been developed under these policies, *Estancias* was developed to respond to one of the strategies of the national social policy, known as *Vivir Mejor*: 'guaranteeing women's equal access to social services and equal opportunities to enter the labour market.' As such, the programme focuses on dimensions of gender equality related to women's economic empowerment resulting from access to the labour market, to better work opportunities and to the release of part of the burden of care activities for which women are typically responsible. There is, however, still scope for strengthening programme design features, particularly to promote social/cultural dimensions of gender equality. Improvements could include: through the *Estancias* or the heads of the *Estancias*, promote sensitisation on changing the roles of men and women inside the household so that women's increased participation in the workforce is supported by men's more active involvement in domestic and care responsibilities; more

explicitly link complementary services that could enhance women's empowerment (such as skills training, work opportunities or counselling and information on domestic violence) to the *Estancias* programme; and plan financially sustainable ways to extend the *Estancias* services (hours of operation, ages at which children are accepted) to better address the needs of working women.

Effects on individuals, households and communities: The programme has had a greater effect at the household level than at the community level, in the case of both single mothers and mothers living with their spouses/partners. Many beneficiaries have started to work outside the home as a result of the programme; others have been able to access more stable and less precarious jobs as a result of having access to a dependable and stable form of childcare. Other positive findings include women's greater autonomy over decision making on their own expenses and some initial evidence of men being more cooperative at home to support their wives in their new roles as income earners. This last finding is not widespread, but illustrates that a slow transformation of gendered domestic roles is possible. Findings on positive perceptions of the programme by many female and male beneficiaries also relate to access to higher incomes and peace of mind arising from going to work while being able to leave their children in a secure and caring environment. Very importantly, the programme has had a very positive impact on early childhood development, particularly as these are children who would not typically have access to such a service. This leads to the conclusion that, despite the need for several small adjustments, the programme is performing well. The programme has been particularly positive for single mothers who have to work to sustain their children and who typically lack support to do this. *Estancias* helps them better cope with the challenge of raising a child on their own while needing to earn an income.

With respect to changes in household dynamics, many women who access the programme initially needed to negotiate their participation with their husbands; other potential beneficiaries have been unable to access it because of an engrained belief that women should remain in the house and care for children. Although evidence suggests that these patterns are changing, some men whose wives were working said that they only 'allowed' this to happen because the money was needed for the household, given problems with male unemployment or shortfalls in income: if the economic situation in the household improved, they would prefer wives to stay at home. Despite evidence of a significant increase in access to work opportunities as a result of the programme, there is a dearth of evidence suggesting that women have used it to continue to pursue education.

With respect to community-level impacts, the design of the *Estancias* programme was informed by a principle of community co-responsibility. However, it does not have mechanisms in place to actively foster networks among beneficiaries. In practice, support is provided by some proactive *Estancia* heads who assume their de facto role as community focal points for women, mobilise some community members (mainly families) around the *Estancia* and communicate important information to beneficiaries. However, this depends on the personality and level of commitment of the head of *Estancia* rather than being an explicit part of the programme's operation.

Drivers of programme impacts: Gender-sensitive programme design is a critical first step, but effective implementation requires strong political will and adequate investment in both human and financial capital to realise the potential of innovative design features. While *Estancias* is considered a 'priority' programme of the current government and resources are flowing well, there is a risk that a loss in political support could limit its budget and render its operations more limited in scope and scale. Another aspect that may impact implementation is the political context in which the programme operates: as *Estancias* is a federal programme, there are some tensions related to its execution between state government authorities, particularly in states where the ruling party is different to the one in power at national level. These tensions relate to both political interests and budgetary allocations, and could reduce potential synergies between *Estancias* and other state government-run programmes that could provide better support to beneficiary women, such as skills training, links to job opportunities and, importantly, access to counselling and attention to programmes on domestic violence, which are usually run by state authorities. In addition to these politico-institutional barriers, socio-cultural factors are also important drivers of programme impact.

Conclusions and policy implications: Subsidised childcare services are an important form of social protection to address vulnerabilities to economic and social risks facing poor women with children. Our analysis of the *Estancias* programme has shown that the programme has had positive impacts, particularly on beneficiary women, in the form of economic empowerment, and on their children, in terms of early child development opportunities. Evidence from the programme also shows, however, that access to affordable childcare and a paid job does not automatically transform gendered attitudes to the division of productive and reproductive roles between men and women. Nevertheless, beneficiary women's entry into the paid workforce is offering them a good basis for a gender transformation, which can promote a more sustainable reduction in their level of vulnerability and dependence, taking a step towards gender parity.

Our findings suggest that some programme design features, and especially implementation practices, could be improved to increase *Estancias* programme effectiveness and fully harness the programme's transformational potential:

- In order to be able to measure more accurately the programme's gendered impacts, it is necessary to include gender-sensitive indicators in the programme's monitoring and evaluation framework through which its performance is assessed and impact is evaluated.
- Integrating gender issues into policy and programme design entails strengthening attention to gender dynamics at the household and community levels, as well as ensuring gender-sensitive mechanisms are embedded within programme operational mechanisms. As such, evidence from programme gender impact assessments should be used to improve programme design on a periodic basis.
- For the programme to achieve a more comprehensive impact on women's well-being and gender roles by encouraging men to support women in their domestic and care responsibilities, changes in social attitudes to women need to be promoted. This can be done through careful sensitisation of both men and women, centred on the *Estancias* programme, the childcare centre and the head of *Estancia*.
- The programme's operational mechanisms should reflect greater gender responsiveness. This could start by ensuring that *Estancia* heads receive training on gender so that they are better able to deal with issues they might face with beneficiaries, their families and children in the childcare centre to and provide them with relevant information which could help them improve their gender roles.
- Synergies between this federal government programme and state government initiatives, such as those to promote work opportunities, access to higher education and skills training and even those geared at protecting women against domestic violence, should also be fostered, so that this information has a more reliable channel through which to reach beneficiaries.
- With respect to the potential contributions of the programme at the community level, and given that *Estancias* is conceptualised as a citizen-to-citizen support programme, one possible way to foster women's networks based on the *Estancia* could be through the selection of one of the more active or engaged mothers to organise initiatives that might contribute to their social and community-level empowerment, with the support of the *Estancia* head and possibly other programme staff.
- Lastly, continued mobilisation of budget resources to support the programme is critical and should be secured, regardless of possible future changes in power.

1. Introduction

Over the past decade, social protection has received greater visibility globally as a means to contribute to poverty reduction and to mitigate vulnerabilities. This is partly the result of the positive impact of well-performing programmes such as *Oportunidades*, the Mexican government's flagship conditional cash transfer programme, which has been instrumental in reducing poverty and increasing children's enrolment and permanence in school (e.g. World Bank, 2005). In addition, social protection programmes were one of the tools chosen to mitigate the negative consequences of the recent food price crisis and global economic crisis on the poor. However, in many countries there has been limited attention to the role that gender plays in the implementation and effectiveness of such programmes. For instance, because many programmes target women specifically, or because, in the case of cash transfers, women are the recipients, reflecting evidence that women are more likely to invest additional income in family well-being (Brown, 2000, in Rivera et al., 2006), it is assumed that these initiatives automatically address gender.

The role that gender relations play in social protection effectiveness is generally more complex, affecting not only the type of risk that is tackled but also the programme impacts, as a result of pre-existing intra-household and community gender dynamics. For example, although some evidence has suggested that channelling cash transfers to women has caused domestic violence incidents, research into the gender-based violence impacts of *Oportunidades* has shown that beneficiary women experience lower levels of domestic violence than non-beneficiaries (Rivera et al., 2006). Moreover, gender norms and roles may shape choice of social protection modality, awareness-raising approaches and public buy-in to social safety net programmes. As Goetz (1995) argues, 'understanding the gendered features of institutional norms, structures and practices is an important key to ensuring that women and men benefit equally from macro level policy changes.' A growing body of international evidence suggests that tackling the gendered manifestations of risk and vulnerability has positive spill-over effects on general programme effectiveness. For instance, a recent review of 271 World Bank projects by the International Food Policy Research Institute (IFPRI) found that, when projects address the needs of both men and women, the sustainability of outcomes increases by 16% (Quisumbing and Pandolfelli, 2009).

In Mexico, formal social protection interventions have been in place for several decades. The formal social security system in place since the 1940s provides social protection to approximately 50% of the population – those who are formally employed either in the private sector or by the government. Nevertheless, more than half of the population, working in agriculture, self-employed or in the informal sector, remains without such coverage – and most of the population living in poverty lies in this latter group. A range of social protection programmes has been developed to bridge the gap in social security coverage, as well as to contribute to poverty reduction, by helping various vulnerable groups cope with risks and by promoting their human development.

More recently, social protection actions have been framed in the country's national development plans, which are launched every six years by the incoming federal government. The latest covers the period 2007-2012. Its accompanying social policy strategy, which includes social protection interventions among a range of other social development programmes and actions, is aimed at promoting more equitable access to basic services and income-generating opportunities and contributing to poverty reduction. Key social protection programmes currently in place include:

- *Protective*: Social assistance programmes such as *Oportunidades*, a cash transfer programme which reaches approximately 5 million households, targeted at poor households to reduce their level of poverty and increase their uptake of basic social services to promote their human development.
- *Preventative*: Mexico's social health insurance programme *Seguro Popular* (Popular Insurance) designed to fill the health insurance coverage gap left by social security, by

- providing affordable health financing, priced according to households' level of income, with the poorest exempt.
- *Promotive*: A range of productive transfers, including for example *Procampo* (Programme of Direct Support to Farmers), a mixed cash and in-kind support to farmers to increase the productivity of their lands.
- *Transformative*: A range of legislation that guarantees equal rights of individuals, for example, the Federal Law on Equality between Women and Men.

This report focuses on one specific social protection programme introduced in 2007, the *Estancias Infantiles para Apoyar a Madres Trabajadoras* (Child Care Services to Support Working Mothers, hereinafter referred to as *Estancias*). This is a subsidised childcare services programme targeted at mothers in poor households (below a threshold of poverty of 1.5 the minimum wage per household member) who work, are looking for work or are studying and do not have access to formal social security-provided childcare. It is implemented by the Federal Ministry of Social Development (SEDESOL) through its delegations in each of the 32 states, with support from the National System for Family Development (DIF).

In three years of operation, the programme has reached 241,019 beneficiaries in 8,923 childcare centres (INMUJERES, 2009). Although primarily benefiting mothers, it has expanded its target to cover poor, single fathers who are responsible for the care of their children. The programme was designed with the gender-responsive objectives of: supporting women's equal access to paid employment opportunities and higher levels of schooling; and building their capacity to lift themselves out of poverty and to develop their capabilities in a more equitable manner. Its rapid expansion has underscored the gap that existed previously in relation to this type of support for women. Evaluations of the programme have so far provided evidence of beneficiary satisfaction, as well as their greater access to more stable jobs (ASF, 2010; SFP, 2008). Nevertheless, there is still much to be done to achieve the target of gender equality, as set out by the 2006 Federal Law on Equality between Women and Men. In particular, this includes ensuring that the consequences of poverty do not continue to impact women more than proportionally, through more equitable progress towards poverty reduction and human development.

The purpose of this report is thus to highlight some of the key vulnerabilities faced by women in Mexico, largely resulting from different gender roles, and to analyse the extent to which gender-specific economic and social risks inform the *Estancias* programme's design and implementation, with the aim of influencing ongoing initiatives to strengthen the programme's effectiveness.

1.1 Methodology

The research methodology for this study involved collecting primary qualitative data. It also drew on extensive statistical data available in Mexico. The study is structured around the following four areas (see Table 1):

1. Understanding the diversity of gendered economic and social risks;
2. Gender analysis of social protection policy and design;
3. Effects of the *Estancias* programme on gender equality and poverty/vulnerability reduction at community, household and intra-household levels;
4. Implications for future policy and programme design to improve social protection effectiveness.

Research was conducted in two localities where the *Estancias* programme is operating, each in a different municipality within San Luis Potosi state. This state is classified as having a high level of marginalisation: 51.1% of the population is considered to live below the multidimensional poverty

line, which is above the national average of 44.4% (CONEVAL, 2009b).¹ This state was chosen since it met our criteria of having an above average level of poverty, and was suggested by programme authorities as a feasible place to undertake the research. Sites were selected using a purposive matched sampling technique, which involved choosing two municipalities with a similar poverty ranking, of neither transient nor extreme poverty (approximately ‘middling poor’), using 2005 data from the National Population Council (CONAPO) and the National Council for the Evaluation of Social Development Policy (CONEVAL).

Table 1: Overview of research methodology

	Details
Desk review	Secondary data and document analysis
Key informant interviews	National (policymakers, international agencies, civil society, researchers) and sub-national (government and non-government implementers)
Focus group discussions	8 FGDs, 4 with beneficiaries (2 male and 2 female groups), 4 with non-beneficiaries (2 male and 2 female groups)
Life histories	16 life histories (8 men and 8 women) at different life/social stages: adolescence; married; single household heads (divorced, abandoned or widowed); elderly

The main objectives of the desk review were to map key gender-specific vulnerabilities in the country; to identify how gender is (or is not) already discussed and integrated within the context of social protection policies and programmes at country level; to carry out a gender audit/mapping of the main social protection programmes and the extent to which they integrate gender considerations; and to contextualise the *Estancias* programme within the country’s broader national social protection framework and related policy debates.

In September 2009, key informant interviews were carried out using semi-structured questionnaires to provide a broader understanding of social protection design and decision-making processes and to explore the political economy dimensions of the integration of gender into social protection policies and programmes. At the sub-national level, researchers undertook key informant interviews with implementing agencies to provide a better understanding of the key challenges of executing social protection at the local level, and the implications of implementation challenges on households and individuals.

Finally, the use of life histories with beneficiaries and non-beneficiaries (representing different life/social stages, from adolescence to old age) allowed for a more in-depth exploration of individuals’ gendered experiences of risk and vulnerability, and the individual-, household-, community- and policy-level factors that shape available coping/resilience strategies. They also provide insights into the relative importance of *Estancias* in diverse individuals’ lives. FGDs were used to tease out the details of the social protection impacts, both direct and indirect, at individual, household and community levels.

1.2 Report overview

The report is structured as follows. Section 2 discusses the conceptual framework that underpins the analysis, highlighting the importance of understanding gendered economic and social risks at individual, household and community levels. It also reviews the extent to which the care economy and gendered productive and reproductive roles have informed the development of social protection policies, particularly in developing country contexts. Section 3 maps out the patterning of

¹ The Methodology for Multidimensional Poverty Measurement in Mexico is based on the methodological criteria the National Council for the Evaluation of Social Development Policy (CONEVAL) has adopted for multidimensional poverty measurement in Mexico. According to CONEVAL, these criteria are a result of careful research, analysis and a consultation process. Additionally, the methodology enriches the study of poverty by complementing the known income poverty method with a social rights lens and the analysis of the territorial context. For more about the methodology, see www.coneval.gob.mx.

gender-specific risks and vulnerabilities in Mexico and in our research sites, and Section 4 discusses the extent to which these are reflected in social protection policy and programming. It also looks at our fieldwork findings on the effects of *Estancias* on gender dynamics at individual, household and community levels. Section 5 explores political economy opportunities and constraints in strengthening attention to gender-sensitive programme implementation. Finally, conclusions and key policy implications of our findings can be found in Section 6.

2. Conceptual framework: Gendered economic and social risks and social protection responses²

Social protection, which encompasses a range of interventions for the poor, is an increasingly important approach to reducing vulnerability and chronic poverty, especially in contexts of crisis (see Box 1). It can be carried out formally by the state (with government budgetary resources or through international donor support and financing or through the private sector), or informally through community or inter- and intra- household support networks. To date, however, there has been a greater focus on economic risks and vulnerability – such as income and consumption shocks and stresses – with only limited attention to social risks. Social risks, however, which include gender inequality, social discrimination, unequal distributions of resources and power at the intra-household level and limited citizenship, are also very important factors that can push households into poverty and keep them there. Indeed, of the five poverty traps identified by the 2008-2009 Chronic Poverty Report, four were non-income measures: insecurity (ranging from insecure environments to conflict and violence); limited citizenship (lack of a meaningful political voice); spatial disadvantage (exclusion from politics, markets, resources, etc, as a consequence of geographical remoteness); and social discrimination (which traps people in exploitative relationships of power and patronage) (CPRC, 2008).

Box 1: Conceptualising social protection

Drawing on Devereux and Sabates-Wheeler's (2004) framework of social protection, there are four broad objectives of social protection interventions:

- *Protective*: Providing relief from deprivation (e.g. disability benefits or non-contributory pensions);
- *Preventative*: Averting deprivation (e.g. through savings clubs, insurance or risk diversification);
- *Promotive*: Enhancing real incomes and capabilities (e.g. through inputs transfers); and
- *Transformative*: Addressing concerns of social equity and exclusion by expanding social protection to arenas such as equity, empowerment and economic, social and cultural rights, rather than confining the scope of social protection to respond to economic risks alone through targeted income and consumption transfers.

Social protection refers to a set of instruments (formal and informal) that provide:

- Social assistance (e.g. regular and predictable cash or in-kind transfers, including fee waivers, public works schemes, food aid);
- Social services targeted to marginalised groups (e.g. family counselling, subsidised childcare, juvenile justice services, family violence prevention and protection);
- Social insurance to protect people against risks of shocks (typically health, employment and environmental);
- Social equity measures (e.g. rights awareness campaigns, skills training) to protect against social risks such as discrimination and abuse.

2.1 The gender dimensions of economic and social risks

Poor households typically face several risks, ranging from the economic to the social. Vulnerability to risk and its opposite, resilience, are both strongly linked to the capacity of individuals or households to prevent, mitigate or cope with such risks. Both economic risks (including the economic impact of environmental and natural risks) and social risks are influenced by gender dynamics and may have important differential impacts on men and women. Because they are socially constructed, gender roles and responsibilities are highly varied, and are infused with power relations (WHO, 2007). Figure 1 below maps the ways in which economic and social risks can be

² This section is based on Holmes and Jones (2009) and draws on Amuzu, et al (2010).

reinforced or mediated from the macro to the micro level through, for example, policy interventions, discriminatory practices embedded in institutions (e.g. social exclusion and discrimination in the labour market) and community, household and individual capacities and agency. Opportunities to enhance the integration of gender at each of these levels are highly context specific and depend on the balance between formal and informal social protection mechanisms within a country, as well as the profile of government agencies responsible for the design and implementation of formal mechanisms.

Figure 1: Impact pathways of vulnerability to economic and social risks



Source: Holmes and Jones (2009).

2.1.1 Gendered economic risks

Economic risks can include declines in national financial resources and/or aid flows, terms of trade shocks or environmental disasters. Stresses might include: long-term national budget deficits and debt; lack of a regulatory framework and/or enforcement of health and safety standards at work; and lack of an economically enabling environment. Since men and women have different types of engagement in the economy, including in the labour market, the impacts of macroeconomic shocks are highly gendered. For instance, according to studies by the Economic Commission for Latin American and the Caribbean (ECLAC), the most intense effects of the crisis will be felt by women in countries with open markets, such as in the case of Central America and Mexico (Montaño and Milosavljevic, 2010). Cuts in public expenditure are also likely to affect women more in many contexts because they typically have greater responsibility for household health and education access (Quisumbing et al., 2008). The effects on men and male identities resulting from adverse economic situations are also increasingly recognised. Silberschmidt (2001), for instance, highlights the way in which rising unemployment and low incomes are undermining male breadwinner roles and resulting in negative coping strategies that men use to reassert traditional masculine identities, such as sexually aggressive behaviour and gender-based violence. This suggests that men's concepts of their masculine roles are threatened by women's involvement in what used to be male-dominated spaces, such as household income generation.

At the meso or community level, the impacts of economic shocks are mediated by, for example, gender-segmented labour markets and institutional rules and norms (e.g. absence of affirmative action to address historical discrimination of women and marginalised social groups), which lead to poor access and utilisation of productive services by women. Women in general have less access to productive inputs, for example credit, land, fertilisers and training, and therefore improved technologies (World Bank, 2009), which undermines their resilience to cope with stress and shocks.

Poor households' capacity to cope with and mitigate the impacts of shocks and ongoing stresses also depends on a number of factors at the micro or intra-household level. Household members' vulnerability is shaped by: household composition (e.g. dependency ratios, sex of household head, number of boys and girls in the household); individual and household ownership and control of assets (property, land, labour, financial capital, livestock, time and so on); access to labour markets, social networks and social capital; and levels of education. Women typically have lower levels of education, less access to, ownership of and control over productive assets and different social networks to men, leading to lower economic productivity and income generation and weaker bargaining positions in the household. In times of crisis, moreover, underlying gender biases may mean that women's or female-headed households' assets are more vulnerable to being sold or given up. Women's bargaining position and entitlements may also be reduced more rapidly than those of male members of households (Byrne and Baden, 1995).

2.1.2 Gendered social risks

Social sources of vulnerability are often as or more important barriers to sustainable livelihoods and general well-being than economic shocks and stresses (CPRC, 2008). At a macro level, social exclusion and discrimination often inform and/or are perpetuated by formal policies, legislation and institutions (e.g. low representation of women or minority groups in senior positions). In many countries, however, efforts to ensure that national laws and policies are consistent in terms of providing equal treatment and/or opportunities to citizens irrespective of gender, caste, race, ethnicity, religion, class, sexuality and disability are often weak or uneven, and hampered by a lack of resources to enforce such legislation, especially at the sub-national level.

At the meso or community level, absence of voice in community dialogues is a key source of vulnerability. For instance, women are often excluded from decision-making roles in community-level committees. Some excluded groups are reluctant or unable to access programmes or claim rights and entitlements, fearing violence or abuse from dominant community members. Another critical and related variable is social capital. Poverty may be compounded by a lack of access to social networks that provide access to employment opportunities but also support in times of crisis. It can also reinforce marginalisation from policy decision-making processes.

At the micro or intra-household level, social risk is related to limited intra-household decision-making and bargaining power based on age and/or gender, and time poverty as a result of unpaid productive work responsibilities and/or familial care work. All of these can reduce time and resources available for wider livelihood or coping strategies, and may contribute to women tolerating discriminatory and insecure employment conditions and/or abusive domestic relationships. Life-course status may also exacerbate intra-household social vulnerabilities. Girls can be relatively voiceless within the family, and a source of unpaid domestic/care-work labour. The elderly (especially widows) also tend to face particular marginalisation as they come to be seen as non-productive and in some contexts even a threat to scarce resources.

2.2 The care economy, gender and social protection

The allocation of responsibilities to care for others in the household is generally highly gendered, and does not necessarily take into consideration the time necessary or the income foregone that

results. In practice, caring responsibilities often make people poorer by restricting their time to make use of economic opportunities, in particular to enter the labour market. Inequality in incomes between men and women is thus exacerbated when females are less able to engage in more hours of paid employment. Further, given the rising prices of basic goods and services, demanding higher household incomes and as a consequence greater time allocation of household members to paid work, more people will risk being unable to meet their caring responsibilities if they are not supported (Himmelweit, 2008).

Subsidised childcare services are therefore an important form of social protection. They can have *transformative* potential, as they promote equality by providing childcare options for poor women, enabling them to access employment opportunities on a less uneven playing field. In addition, there is evidence that women with higher levels of income are more able to pay for childcare, allowing them to balance work and family life (e.g. ECLAC, 2010) more easily than poor women can. The latter are typically unable to afford childcare services or are able to access only precarious forms (for example unreliable care by friends or family members). This situation exacerbates inequality in access to opportunities among women with different levels of income. Subsidised childcare can thus foster more equal opportunities as a *promotive* form of social protection. Further, in a context where poor women's income – either additional to their spouse's or as sole breadwinners – is necessary for households to make their way out of poverty, subsidised childcare is a useful form of social protection, facilitating women's ability to generate higher household income.

According to analysis by Himmelweit (2008), the current policy interest in care responds to women's increasing participation in the labour force, which has rendered the male breadwinner/female carer model in need of amendment. Nevertheless, because less has changed in the gender division of labour over care, it is women and those they care for who are affected by the lag in public policy responses. This means that social policy on care, depending on its specific content and how it is implemented, may either exacerbate or ameliorate gender inequalities. If successful, policies to enable some aspects of care to be provided outside the family can promote gender equality in employment by enabling women to undertake paid work, and for longer hours than would be possible if they were reliant only on themselves or family members for the provision of care. To increase the probability of success and to more effectively promote gender equality, the use of paid care should also be part of a solution that includes more equal sharing of care work between men and women: care provision outside the family can increase gender inequality if it enables gender roles to go unchallenged, with women taking employment while bearing the burden of care responsibilities at home after work.

The state's role in supporting childcare services as a means to promote gender equality is recognised in Article 11 of the Convention for the Elimination of All forms of Discrimination Against Women (CEDAW):

'In order to prevent discrimination against women on the grounds of marriage or maternity and to ensure their effective right to work, States Parties shall take appropriate measures, which include to encourage the provision of the necessary supporting social services to enable parents to combine family obligations with work responsibilities and participation in public life, in particular through promoting the establishment and development of a network of child-care facilities' (UN, 1979).

With regard to the fulfilment of this commitment, according to ECLAC (2010) harmonisation between work and family life – which relies on the redistribution of reproductive responsibilities among the state, the market and families – continues to be a blind spot for public policy in many developing countries, including in Latin America and the Caribbean. Despite important progress in public policies and programmes in the region, which has contributed to the advancement of women, ECLAC highlights that social and political institutions continue to operate under a rigorous gendered division of labour, which preserves the stereotype of females as caregivers and males as income providers, with the social effects that this division implies.

Indeed, to achieve more permanent changes with respect to gender roles in childcare which can enable women, particularly the poorest, to reduce vulnerabilities, such as their more limited access to post-secondary education opportunities and to formal, better-paying and less precarious jobs, it is important to promote the transformation of care roles. This includes promoting a culture of co-responsibility that, in addition to ensuring childcare is accessible and affordable, seeks to increasingly involve men in shouldering a greater responsibility for care. In Costa Rica, for instance, the main aim of the National Policy on Gender Equality and Equity is to ensure that care is seen as a social co-responsibility, including through the promotion of cultural changes (ECLAC, 2010).

In response to this service provision gap, some countries have implemented specific actions to provide some form of protection for women. This is the case with Mexico's *Estancias* programme. Similarly, Bolivia, through its public policy to support equal opportunities, is promoting the redistribution of domestic and care activities within households. In the context of *Chile Crece Contigo* programme, public crèches increased by 240% with respect to 1990 (ECLAC, 2010).

Another interesting dimension of paid care services is that they can exacerbate gender disparities if paid carers themselves are badly paid, since employment in the care sector comprises predominately women (Antonopoulos, 2009). Care work may pay less because caring skills and functions are typically associated with women and their mothering role, which are culturally devalued (England and Folbre, 1999). As such, a gender-sensitive approach to public policies on childcare should not only support care for users but also ensure that care workers can enjoy fair employment opportunities. Policy that improves conditions in the care industry, by instituting a proper career structure backed up by well-funded training, would make a significant contribution to improving gender equality (Himmelweit, 2008).

In conclusion, if the aim is to reduce gender inequality by bringing women into the labour market, increasing subsidies for those who cannot earn enough to purchase substitute care is an important step in policy design.

3. Gendered risks, poverty and vulnerability in Mexico

There has been ample international research about the obstacles faced by women – particularly the poor – to generating an income and improving their living conditions. Many of these obstacles result from gender inequalities. As outlined in the conceptual framework, these include: i) inequality in distribution of income within the household, which largely affects women and the elderly; ii) the burden in terms of time, effort and resources of undertaking their productive, reproductive and care roles; iii) lower returns to female employment; iv) the existence of double and triple labour shifts; and v) the lack of autonomy for decision making; among others (e.g. Baxter, 2002; Casique 2001; Kabeer, 1994; and Tepichin et al., 2009). All these elements can be linked to gendered hierarchies that try to push women into passive, dependent and subordinate roles.

The sections below provide an overview of some of the key economic and social risks and vulnerabilities facing women in Mexico, and how they differ in many cases from the risks faced by men. In particular, we seek to analyse how these have evolved over time, in order to be able to explore the gender sensitivity and relevance of social protection mechanisms in Mexico in Section 5, focusing particularly on the *Estancias* programme.

We first present an overview of gendered risks and vulnerabilities at the national level, and then go on to highlight the specificities of our research sites.

3.1 Brief overview of the economic situation in Mexico: Some economic risks related to the crisis

Mexico is the second largest economy in Latin America after Brazil. Nevertheless, it faces enormous challenges in spreading prosperity across the majority of its population. According to CONEVAL, around 47.4% of the population is considered poor and 18.2% is considered as living in extreme poverty (in World Bank, 2010).

Mexico was hard hit by the global economic crisis and the collapse of international trade during the last quarter of 2008 and the first quarter of 2009. The number of people living in poverty increased steadily between the first half of 2008 and the third quarter of 2009. After peaking in the third quarter of 2009, 'labour-related poverty,'³ defined as those unable to purchase a basic food basket with the income derived from their work, has slowly started to come down, mirroring the economic recovery (CONEVAL, 2010a).

Labour markets deteriorated during the crisis, with unemployment reaching its highest level since 2000, peaking at 6.4% in September 2009. Growth of real earnings is expected to be weak in 2010, with minimum wages increasing only slightly faster than forecast inflation. A further economic challenge facing Mexican households, resulting from the poor performance of the US economy as a result of the crisis, is the heavy contraction in remittances in 2009, which decreased by 15.7% with respect to the previous year, according to Central Bank data (in World Bank, 2010). This is relevant, given that remittances are a critical form of informal social protection for many poor households.

There is evidence to suggest that, when Mexico has faced economic downturns in the past, the informal sector has buffered the blow to the formal sector by increasing its share of overall employment. However, during the recent crisis, informal employment and unemployment have increased less than in past major crises, particularly as compared with the 1994 peso crisis,

³ The 'labour-related poverty trend' is measured quarterly using the National Survey of Occupation and Employment (ENOE) as opposed to the poverty headcount, which was last measured using the 2008 Income and Expenditure Household Survey (ENIGH).

despite similar declines in output. This is a positive signal of the crisis having fewer long-term effects on the economy. Good policy responses by the authorities have been highlighted as one of the explanations for this positive outcome (IMF, 2010).

Towards the end of 2009 and in the first half of 2010, the economy started to rebound, and 4% growth is expected for 2010. It is estimated that, after the first three months of the year, the rate of unemployment had gone down to 5.3%, with 28.6% of the working population in the informal sector (INEGI, 2010).

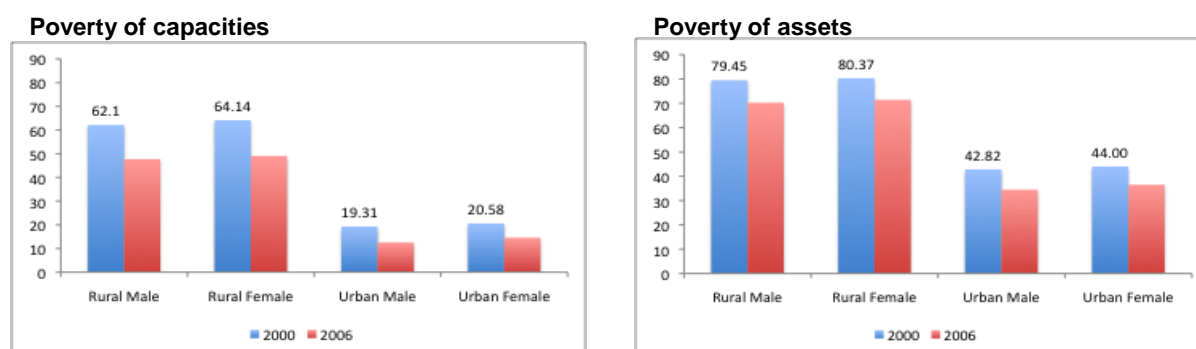
Public revenue-enhancing measures and a temporary budget deficit are part of the 2010 budget scenario. The government has responded to a decrease in tax revenues resulting from the weak economy and poor performance in some sectors (such as oil exports) by increasing tax rates and, at the same time, allowing for an additional budget deficit of 0.7% of gross domestic product (GDP) in 2010 (World Bank, 2010). Programme expenditure fell by 1.9% after the first semester of 2010, including through a reduction in personal expenses and salaries of government officials. Authorities estimate, however, that this reduction in expenditure has not had an impact on social spending, with increases in expenditure on health, social security and social assistance programmes as part of the country's set of countercyclical measures (SHCP, 2010)

3.2 Gendered economic risks and vulnerabilities

3.2.1 Poverty

As in other countries, Mexico's official poverty measurements are based on poverty lines that consider the average price of a basic food basket. Non-food consumption baskets are also measured, including the costs of other basic goods such as education, health, housing, clothing and transport. On this basis, three different poverty lines have been defined: food poverty, poverty of capacities and poverty of assets. Elements of these measures, along with information about perceptions of poverty, are used to calculate 'multidimensional poverty.'⁴ A recent study by Tepichin et al. (2009) used these poverty lines to estimate the difference in the share of men and women living in poverty. The study determined gender-specific poverty lines based on men's and women's different consumption patterns (for example specific reproductive health expenses necessary for women). The study found that there were more women living in poverty than men.

Figure 2: Male and female population below 'poverty of capacities' threshold and 'poverty of assets' threshold, changes between 2000 and 2006 (%)



Source: Tepichin et al. (2009).

⁴ Income poverty is estimated using data from ENIGH for 2008 and the Second National Population and Housing Count for 2005. It classifies poor households according to three poverty levels: i) *food poverty* – households' entire income is insufficient to purchase even a basic food basket; ii) *poverty of capacities* – household income is insufficient to purchase a basic household basket and still have enough resources to pay for necessary health and education costs; iii) *poverty of assets*: household income is insufficient to purchase the basic food basket and necessary health, education, clothing, transport and housing expenses. For more details, see www.coneval.gob.mx.

Figure 2 illustrates that, even though there was a significant fall in the share of the population below both the capacities and the assets poverty lines from 2000 to 2006, the share of women living below these two poverty lines in rural and urban areas remained higher than the share of men, indicating a greater incidence of poverty among women. Limited economic opportunities for women, discussed in more detail below, imply greater difficulties in surmounting these greater levels of poverty without clearer targeted actions for women to change these dynamics.

Analyses in Latin America show that, among households headed by a single parent, more poor households are headed by single women (ECLAC, 2007). In Mexico, however, single parent households headed by women tend to be less poor than single parent households headed by males, as reported by CONAPO (2009). This is partly because they receive more informal monetary transfers from friends and family than single parent households headed by men, particularly if they are considered poor (Gomez de Leon and Parker, 2000), offsetting the lower monetary income. Thus, to better understand the situation of female-headed households, Gomez de Leon and Parker (2000) recommend looking beyond the level of monetary poverty only to focus on more household well-being.

In addition to the low level of income of many single female-headed households, the household structure poses a challenge to the economic capacity of women to manage these households, to monitor children's well-being and to promote other activities that could contribute to the general well-being of household members. Further, female household heads dedicate more time to unpaid work (including around the home and providing care). An important characteristic of female-headed households is their lower level of education. Although only between 3% and 12% of male-headed households lack formal education, the rate for female-headed households is between 15% and 35% (INEGI and INMUJERES, 2008).

3.2.2 Education

Until the end of the 1990s, there was still a five-percentage point gender gap in basic education attendance, exacerbated by poverty. Between 2000 and 2005, this gap was narrowed,⁵ largely as a result of the government's efforts to promote schooling – particularly for girls – including through social protection programmes such as *Oportunidades* (e.g. Jusidman, 2004).

In Mexico, basic (compulsory) education is nine years: six years of primary and three years of secondary school. In the case of basic education, male (91.3%) and female (91.66%) enrolment and attendance rates are high, although universal coverage has not yet been achieved and quality of public education is insufficient in relation to international standards.⁶ Average years of schooling of the female population aged 15 and older is over 7.9 years and of the male population 8.4 years. In both cases, this is equivalent to virtually two years of secondary education (INEGI and INMUJERES, 2008). Although progress in educational attainment is clear, aggregate statistics hide some disparities – including gender disparities – between localities and poverty levels.

Important gaps are evident between rural and urban areas: whereas average schooling in rural areas for females is 5.3 years and for males 5.6 years – equivalent to incomplete primary education – in urban areas, defined as with a population of 100,000 or larger, female schooling averages 9.4 years and male schooling 9.9 years (INEGI and INMUJERES, 2008)

Among younger generations, school rates are higher for both sexes as a result of greater educational opportunities, and the gender gap narrows significantly. Young men and women between 15 and 29 years have on average complete basic education (six years of primary plus three years of secondary), with an average of 9.4 completed school years in the age group. In contrast, among the population aged 45 to 59 years, women have an average of 1.1 years less of

⁵ http://estadistica.INMUJERES.gob.mx/formas/panorama_general.php?menu1=2&IDTema=2&pag=1.

⁶ For example, this has been highlighted by the Organisation for Economic Co-operation and Development (OECD) Programme for International Student Assessment (PISA) evaluation standards.

schooling (6.4) than men (7.5) (INEGI and INMUJERES, 2008). This change in education trends signals an important opportunity for younger women to participate more actively in the labour market. For this purpose, specific support – such as greater access to child care facilities – needs to be available, as discussed below.

Despite recent progress in access to public education, an important indicator that illustrates disparities between male and female access to education in the past is the illiteracy rate. In 2005, 9.8% of women aged 15 years and older were reported to be illiterate; this figure was 6.8% in the case of men in this same age group. This situation is even starker in rural areas, with 21.7% of females and 16% of males not being able to read or write (INEGI and INMUJERES, 2008). Illiteracy is a great barrier to accessing services, enrolling in government programmes and, more importantly, accessing jobs, particularly formal sector jobs. Illiterate women are particularly vulnerable in terms of poverty and in terms of lifetime dependence.

Gender disparities in education are particularly prevalent among indigenous groups,⁷ who have lower levels of education in general. For instance, only 55% of 15-year-old girls attend secondary school in indigenous communities (INEGI and INMUJERES, 2008), which suggests a need for targeted support in these areas, specifically to girls, to be able to achieve universal school enrolment.

There are many causes for persistent gender disparities in education in Mexico, including the fact that in many households men are still seen as the main breadwinners, so families see less value in investing in girls' education (Jusidman, 2004). Some families prioritise boys' education, particularly when there are insufficient resources to finance education for all. Some girls are not interested in continuing in school because they fail to see employment opportunities, despite greater levels of education. Additionally, in some cases, secondary and technical schools do not allow pregnant girls to continue attending school and/or teenage mothers lack childcare services that would allow them to continue going to school.

Although official data are not yet available on the level of school dropout resulting from the recent economic crisis in Mexico, it is likely that some families, facing unemployment, lower incomes and higher prices, could no longer afford to continue paying for children's education-related expenses, or that children were required to work to contribute to the household income. In fact, during the 1995 economic crisis in Mexico, Skoufias and Parker (2002) documented that children's risk of dropping out increased, with the risk for girls increasing more than the risk for boys.

3.2.3 Health

Maternal mortality, infant mortality and malnutrition have significantly reduced in Mexico, to the extent that they are no longer the most critical challenge in the country's public health strategy. Chronic diseases have instead become the main cause of mortality (Federal Government, 2007b). Nevertheless, maternal mortality is still a problem, particularly in the poorest regions of the country. In 2007, it was estimated that there were 55.6 maternal deaths per 100,000 live births at the national level and infant mortality was 15.2 per 1,000 live births (CNEGSR, 2008). In contrast with the national average, maternal mortality in Guerrero state is 128 deaths per 10,000 women, and in Chiapas it is 90.1. These are two of the poorest states in the country.

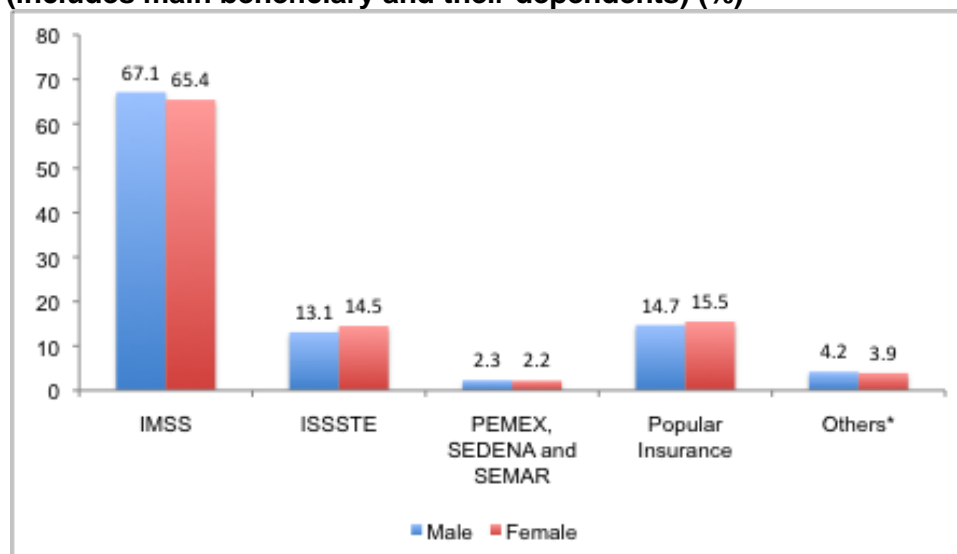
⁷ Indigenous population in Mexico (defined as all those who speak an indigenous language) face greater vulnerabilities across a range of dimensions than the rest of the population, including being among the poorest. For example, indigenous peoples are spread throughout the country, although states with a higher concentration are Chiapas and Oaxaca (the two poorest states in the country) and Yucatan. According to the Population and Housing Count of 2005, the indigenous population of five years or older exceeds 6 million (5% of the total Mexican population), 50.8% female and 49.2% male. Gender disparities are greater in most dimensions (education, health, labour, household decision making) than for the rest of the population (INMUJERES, 2006). For more details about the characteristics of the indigenous population in Mexico, see www.cdi.gob.mx/.

The three most common causes of death for adults (18 to 65 years old) in Mexico are diabetes and heart disease, with more women dying of diabetes and more men dying of heart disease. In 2008, for example, 73.6 women for every 100,000 died of diabetes, against 63.4 men for every 100,000.⁸

This epidemiology highlights a new source of vulnerability for women: these diseases are preventable or curable but in most cases require significant levels of treatment, which is generally expensive and accessible only in certain hospitals. This can render treatment unaffordable and/or inaccessible for many women and their families, particularly those that are poor. In fact, chronic illnesses have been identified as very common among the population living in poverty and represent a factor contributing to their vulnerability (Federal Government, 2007a). This is why programmes to support access to affordable preventative health care and early detection, including through periodic visits, can contribute to keeping individuals, particularly women, healthy, in addition to reducing related economic shocks. According to a study by the Organisation for Economic Co-operation and Development (OECD, 2005), there are significant health inequalities in access to health services, particularly for the poor and for populations living in rural areas. Until recently, this was linked to low levels of public spending on health services, although in the past five years the level of public expenditure on health has risen (Federal Ministry of Health et al., 2009). This rise in public health spending is related particularly to an increase in funding for *Seguro Popular* insurance, described in more detail below.

In Mexico, a significant share of the population (46.9%) has some form of health insurance: 46.1% of men and 47.7% of women (INEGI, 2005). However, still over half of the population remains uninsured (see INEGI and INMUJERES, 2009).

Figure 3: Distribution of population with health insurance by institution and sex, 2005 (includes main beneficiary and their dependents) (%)



Note: * Includes private health insurance. ** The sum maybe over 100% given that some people are covered in more than one institution.

Source: INEGI (2005) population.

Mexico's social security system, which provides health coverage to private and public sector salaried employees and their dependents, comprises IMSS (Mexican Institute of Social Security, for private sector employees), ISSSTE (Institute of Social Security Serving the Workers of the State) and *Pemex* (the state oil company)/SEDENA (the Federal Ministry of Defence)/SEMAR (the Federal Ministry of the Navy).⁹ These institutions have been part of Mexico's social security system

⁸ Data from the National Health Information System (SINAIS): <http://sinais.salud.gob.mx/mortalidad/>.

⁹ IMSS provides social security benefits for private sector employees; ISSSTE provides social security coverage to all government employees; *Pemex*, SEDENA and SEMAR each has its own social security scheme for employees/officers.

for a few decades. Most of the insured population is covered by IMSS. In 2004, a new social health insurance scheme was introduced with the aim of achieving universal access to health insurance (including the coverage of medications and health services): *Seguro Popular*.¹⁰ This provides coverage to those outside the formal sector –unemployed, underemployed, self-employed, those working in agriculture and those in the informal sector. Figure 3 shows that, despite being much newer than the other mechanisms, it has a significant number of beneficiaries, indicating that there has been high demand from the population without access to social security. In fact, *Seguro Popular* reached 31.1 million beneficiaries in 2009,¹¹ which is equivalent to approximately 29% of the population. This is almost double the approximately 15 million reached in 2005, contributing to narrowing the gap in the number of uninsured.

This increase in health insurance coverage is significant, given the rate of health expenditure, particularly in poor households, which includes catastrophic health risks and long treatment (such as that related to a prolonged illness such as cancer or diabetes). It is estimated that 6.3% of the population faces major health expenses that can render them poor (OECD, 2005). The situation is even more problematic for those who lack health insurance, needing to choose between foregoing health treatment or paying a significant share of their resources to cover health costs.

What is more, a recent analysis of the registry of beneficiaries of *Seguro Popular* shows that women are the holders of the insurance card in approximately 81.5% of member households.¹² This may suggest that these women are the household heads. It may also mean that women could be facing greater difficulties in accessing formal social security and private health insurance, so they seek this alternative. Based on this information, *Seguro Popular* can help mitigate the risk of catastrophic income shocks to female-headed households and thus contribute to a reduction of one form of gender disparity. This is particularly relevant in light of the greater incidence of poverty among women and thus their lower probability of accessing regular insurance mechanisms, rendering them more vulnerable to significant health and economic risks.

In addition to health insurance, formal social security systems include disability insurance, pensions and subsidised mortgages, provided mainly by IMSS and ISSSTE. Some of these benefits are being provided to the rest of the population through targeted programmes, but they reach only a fraction of those in need. Importantly, social security systems in Mexico historically presented important gender disparities. For example, only in December of 2001 were female workers able to register their spouses or partners in the system.

3.2.4 Employment and unemployment

At a national level, Mexican women face less access to paid employment opportunities than men. In most cases, their jobs are worse paid and often in lower positions (INEGI and INMUJERES, 2008). This problem is linked both to the type of work available to women, given their lower level of schooling, and to the fact that many women need to/want to/are pressured to fulfil their domestic and care roles, which absorbs most of their time.

In 2008, 78 out of every 100 men and 42 out of every 100 women participated in economic activities (paid workforce). Despite the increase in women's participation in the labour market in recent years, there are many reasons why it is still significantly below the participation of men. These include discrimination in hiring processes, low pay, limited mobility of women and limited possibility of professional development.

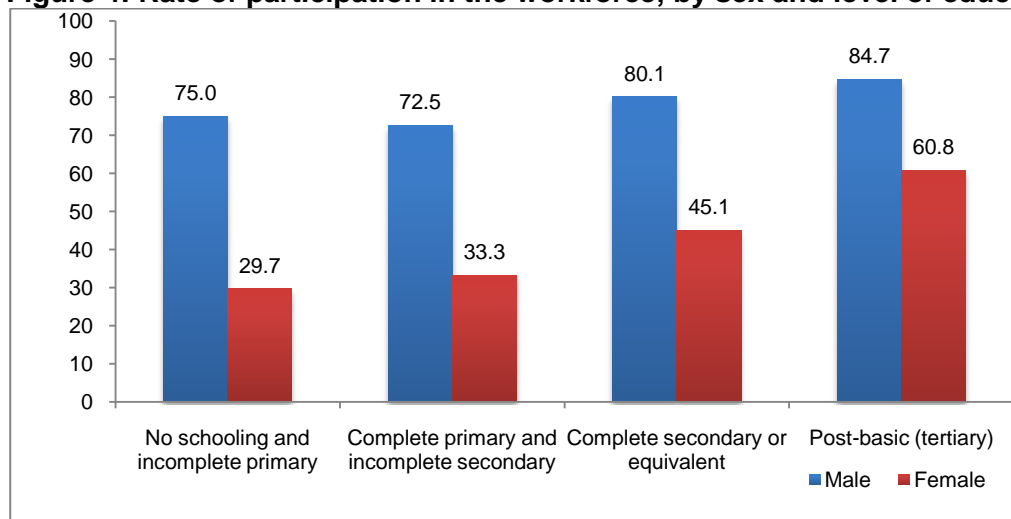
¹⁰ Prior to 2004, analysis of national data revealed that many uninsured Mexican families faced significant expenditure on catastrophic health risks, which sometimes pushed them below the poverty line. *Seguro Popular* and its associated Fund for Protection against Catastrophic Expenses includes a specific package of benefits that enables beneficiaries to access more than 250 health promotion and disease prevention measures, including outpatient care and hospital care for basic specialties. It includes antiretroviral therapy (ART), intensive care for newborns, cancer care and haemodialysis.

¹¹ See www.seguro-popular.gob.mx/index.php?option=com_weblinks&view=category&id=35&Itemid=166.

¹² Data from *Seguro Popular*'s operating indicators, June 2010.

Work conditions for women in Mexico are generally inflexible. For example, according to the Federal Labour Law, maternity leave is limited to six weeks before delivery and six weeks after, and the law is limited to setting standards and benefits (such as childcare) for those working in the formal sector, which means that women in the informal sector have no guarantees or benefits. This limits women's time to carry out care responsibilities, and access to childcare facilities is still very limited. Additionally, as a result of traditional social norms, there is an inadequate distribution of domestic work: whereas 96.1% of women participate actively in domestic work, only 58.4% of men do.¹³ The rate of women's versus men's participation in domestic work remains the same despite women's level of education and participation in the workforce, which suggests that, at higher levels of education, women have additional work burdens (INMUJERES and INEGI, 2008). Indeed, the 2009 National Survey of Time Use (ENUT) found that women dedicate 23.6% of their time each week to domestic work, whereas men dedicate 7.3%.¹⁴ Importantly, the 2002 ENUT highlighted that this pattern emerged from childhood: girls between 12 and 14 years of age were already spending 20 hours a week on domestic work, and by age 19 they were spending over 25 hours per week. Boys aged 12 to 19 spent between 8 and 11 hours per week on domestic work (Paris Institute of Political Studies, 2005).

Figure 4: Rate of participation in the workforce, by sex and level of education (%)



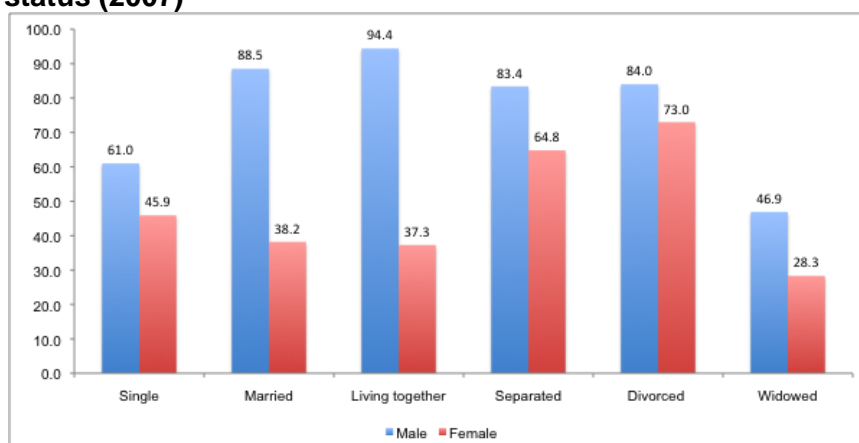
Source: INEGI and INMUJERES(2009).

The gap between the number of men and women who participate in the workforce, on the other hand, narrows with the level of education. This suggests that Mexican women with low levels of schooling face greater limitations (ideological and practical) to participating in the labour force.

Women who live with their spouse or partner have the lowest participation in the paid workforce, whereas divorced women participate more actively, as illustrated in Figure 5. This suggests that, for many women and men, women's paid work is seen as a 'safety net,' to be used only when the spouse's income is insufficient or when there is no spouse/partner to provide an additional income.

¹³ See http://estadistica.INMUJERES.gob.mx/formas/panorama_general.php?menu1=6&IDTema=6&pag=1.

¹⁴ See www.inegi.org.mx/inegi/contenidos/espanol/prensa/comunicados/enut09.asp.

Figure 5: Rate of participation in the workforce (outside the home), by sex and marriage status (2007)

Source: INEGI and INMUJERES(2008).

The difference in the rate of male and female participation in the paid workforce varies in each state. Although the national average suggests a 36.8 percentage point difference (78.2% of men work, as against 41.4% of women), the difference is as low as 31.1% in Morelos and as high as 52.8% in Chiapas, one of the poorer and less educated states (in INEGI and INMUJERES, 2008).

Of the total population seeking jobs, 5.4% of men and 4.8% of women were unemployed: because most women are not actively looking for jobs, their unemployment rate is lower. There is thus enormous potential for women's incorporation into the workforce. Currently, women face challenging work conditions: for example, it is estimated that 39% of the informal sector comprises women (INEGI, 2008), which is an overrepresentation, given the lower rate of women's participation in the overall workforce. Many women face more work-related economic vulnerabilities resulting from precarious work conditions, limited access to social security, uncertain wages and the possibility of losing their jobs in the absence of a contract.

Another crucial aspect to take into consideration is the wage gap between men and women. According to 2007 data from the Wage Discrimination Index, men earn on average 9.7% more than women. This percentage varies according to the sector and the type of economic activity. In fact, a recent analysis of the situation of working women in Mexico found that, after controlling for variables such as age, years of schooling, marriage status, position in the household, locality, sector of employment and position, women's incomes can be up to 14% lower than men's. Lower wages are therefore an additional source of vulnerability for women (INMUJERES, 2008).

An interesting analysis of men's and women's perceptions of women's participation in economic activities was undertaken by the Gender and Poverty Observatory,¹⁵ a joint initiative between the UN Development Fund for Women (UNIFEM), the Institute for Social Development (INDESOL), the Colegio de Mexico and the National Women's Institute (INMUJERES). This was based on a survey of the living conditions and experiences of poverty in urban areas in Mexico, which collected data on the perceptions, practices and values of men and women with respect to different dimensions of gender and poverty. The following findings shed some light on the reasons behind women's limited – yet growing – participation in the workforce:

- Women in urban areas living in poor households have a lower rate of participation in the paid workforce (36.6%) than women living in non-poor households (49.5%).
- Whereas 76.3% of women interviewed said that they thought women should have a paid job, only 52.6% of men agreed. Similarly, 24.4% of men thought that women should not work, and 10.4% of women agreed.

¹⁵ <http://ogp.colmex.mx/>.

- Out of the men and women who replied that women should work only under certain circumstances, 67.2% of men and 70.2% of women said that women should work to improve the economic situation of the household; 14.6% of men and 16.5% of women said they should work to improve children's education; and only 6.2% (in both cases) said that women should work for their personal/professional fulfilment.
- This is in line with the belief that women with small children should not work, which 76% and 67% of men endorsed.
- Lastly, 76% of women and 84.8% of men indicated that men should take full responsibility for all household expenses.

These findings suggest that there is still a difficult road ahead in relation to transforming perceptions about gender roles and the potential for women's participation in the workforce. Higher levels of education are helping transform some of these positions, but there are still large gender gaps. Better salaries and work opportunities for women, as well as better mechanisms to support their care functions, can contribute towards mitigating some of these vulnerabilities.

3.3 Social risks and vulnerabilities

3.3.1 Violence against women

In Mexico, gender-based violence is common in all socioeconomic and age groups, and at all levels of education. Violence against women is classified into six categories: domestic, workplace, school based, community, institutional and violence leading to death. According to the National Survey on the Dynamics of Relations within Households (ENDIREH), which is nationally representative and was carried out in 2003 and 2006 specifically on violence against women, 67 of every 100 women 15 years or older have been victims of at least one of these types of violence.

The most common form of violence is domestic violence. The 2006 ENDIREH found that four out of every 10 women aged 15 years or older who were married or lived with their partners were victims of at least one episode of violence – emotional, physical, economic or sexual– within the 12 months prior to the survey.¹⁶

Although violence occurs in all settings, a greater prevalence of women suffering at least one episode of domestic violence has been reported in urban localities (42.1%) versus rural (33.3%).¹⁷ Levels of education are negatively related to prevalence of violence: 18.3% of women with no education or incomplete primary have been victims of violence, but this percentage goes down to 13.4% when women have completed at least secondary school (INEGI and INMUJERES, 2008). This is an additional reason why women's education is important.

3.3.2 Adolescent pregnancy

Adolescent pregnancy is a source of vulnerability for young women, with impacts on the rest of their life, given the opportunities that they have to forgo as a result of having to care for children earlier on in their lives. There are also greater physical risks linked to having children at a younger age, which can be exacerbated by the poorer nutrition and lower antenatal care that has been observed during adolescent pregnancies. Other factors that render young mothers more vulnerable include their inadequate preparedness for parenthood and emotional maturity, and the fact that many adolescent pregnancies are unplanned (INEGI, 2009).

¹⁶ http://estadistica.INMUJERES.gob.mx/formas/panorama_general.php?menu1=4&IDTema=4&pag=1.

¹⁷ It is unclear from the survey whether this figure results from a greater incidence of domestic violence in rural areas or whether there is just more reporting in urban areas.

Although the rate of adolescent pregnancies in Mexico is still considered high in comparison with countries with similar levels of income, it has come down in the past 20 years, particularly between 1990 and 2005. Nevertheless, in 2007 adolescent mothers accounted for 16.8% of total births.

Adolescent pregnancy is related to education: the lower the level of education, the higher the pregnancy rate among adolescent girls. Between 1992 and 1996, the birth rate among adolescents with no schooling was 213.6 births per 1,000 women, whereas the birth rate in the same age group among girls with secondary and tertiary education was eight times lower (27.1 births per 1,000 women). This is related to the fact that adolescent mothers tend to drop out of school and therefore have lower educational levels and subsequently lower employment status. There is also a correlation with the size of the locality where young women live: the smaller and more rural the locality, the more likely it is that there will be adolescent pregnancies (INEGI, 2009; INEGI and INMUJERES, 2008).

According to data collected by the National Institute of Statistics and Geography (INEGI), most adolescents (95%) know about birth control, including in rural areas (86.4%) and in indigenous communities (73.5%). Still, use of birth control is low: only 45% of sexually active girls between 15 and 19 use family planning mechanisms (the rate increases to 59.2% for young women aged between 20 and 24) (INEGI, 2009). This is notwithstanding the fact that use of birth control methods has increased in the past few years. As a result, a significant number of these pregnancies are not planned. There are several reasons for these relatively low levels of use of birth control, including: insufficient free/cheap availability of birth control; the fact that adolescent girls tend not to talk about their sexual activity for fear of upsetting the family and hence fail to seek support to obtain birth control; unwillingness to use birth control methods; and, in some cases, young men not wanting their partners to use birth control (although the rate of use of birth control is higher among young men than among young women) (INSP and Federal Ministry of Health, 2006).

Adolescent pregnancy is also correlated with poverty. According to a study by Sanchez and Salles (1998), for instance:

- Adolescent mothers have a greater likelihood of living in poor households, already a cause of vulnerability that links to their lower level of schooling and dearth of options for personal development as an alternative to motherhood.
- Adolescent mothers tend to have adolescent partners, who also lack schooling and have limited possibilities of obtaining a well-paid job, further limiting the chances of providing a stable income for the new family, leading to continued poverty and more unstable couple relationships as compared with those of adult mothers.
- As a result of these unstable relationships, adolescent mothers are likely to become single mothers and therefore to be entirely responsible for caring and providing for their children. This generally forces them into low-paid and precarious employment, and virtually ends the possibility of them continuing studying.

3.3.3 Decision making and autonomy

The Gender and Poverty Observatory has undertaken several quantitative and qualitative studies focused on populations – mainly women – living in poverty, in order to understand the evolving role of women as decision makers within the household, particularly those living with a spouse or partner. This research focused on urban areas provides important insights into poor women's vulnerabilities and opportunities. Some key findings include:

- 62% of women stated that they needed to ask their spouse for permission to undertake paid work; 57% of men interviewed also stated that their spouses needed to ask them for permission in order to work.
- 50.3% of women pointed out that they decided how money should be spent on everyday household expenses, whereas 55.3% of men replied that they were in charge of these

decisions. However, when it came to major expenses or important purchases, this ratio changed. Only 35.6% of women said that they made these decisions, whereas 66.3% of men said it was their role to decide on more important expenses.

- Two-thirds decided when and where to move, and less than one-third of women were involved in these types of decisions in the household.
- Two out of every five women pointed out that their husbands decided on the education of girls, whereas more women (one in every two) said that their husbands decided on the education of boys. The situation was different with regard to the health of children. When children got sick, 46% of women said they decided themselves what to do, whereas 42.4% of men said it was their decision.
- 34.7% of women replied that they needed to ask permission to go to the doctor. Similarly, 48.3% of women replied that they needed to ask permission from their spouse to visit friends and 46.3% to visit family.
- 49% women showing interest in participating in an organisation needed to get permission from their spouse to join.
- Women also felt that they needed to ask for permission in order to save money. Close to one out of every two women sought permission to participate in a savings group or to open a bank account.
- Lastly, and very importantly, 44% of women needed to get their husband's permission to use birth control, with 39.9% of women saying that they did not require this permission.

This information is a good illustration of the limitations, either imposed or chosen, to more autonomous decision-making processes which could lead to greater empowerment and agency and reduce some gender-based economic and social vulnerabilities, including within the household. Since these responses are based on an urban sample, in which women are likely to be better educated and participating more actively in the workforce, the situation in rural areas is likely to be worse. Therefore, policies and programmes geared toward raising the awareness of women on their capacity and right to decide and increase communication within the household are critical.

3.4 Overview of vulnerabilities in our sites

The section above discussed aggregate gender differences at national level, at the same time underlining the existence of significant disparities across states and localities. In this section, we provide an overview of the socioeconomic characteristics of San Luis Potosi state and highlight context-specific economic and social vulnerabilities experienced by men and women of our two research sites: La Esperanza locality in the municipality of Zaragoza and Chapulhuacanito locality in Tamazunchale municipality (see Table 3). The section also examines coping strategies that some individuals in these localities utilise to mitigate their vulnerabilities. Drawing on existing statistical data as well as on the life history interviews undertaken as part of our research, this section provides the context for our analysis of the gendered impacts of the *Estancias* programme in the sections that follow.

3.4.1 Economic and social vulnerabilities in San Luis Potosi state

The state of San Luis Potosi has a population of close to 2.5 million. It has a mix of urban and rural localities within its different municipalities, and it is classified as having a high level of marginalisation. It ranks sixth among the country's 32 states in terms of its level of marginalisation and social development,¹⁸ as a result of insufficient provision of basic services resulting in poor levels of educational attainment and low levels of per capita income. Within the state, 37.5% of the population lives in 40 municipalities classified as having very high and high levels of social marginalisation; 13.8% in 11 municipalities with a medium level of social marginalisation; and 48.7% in municipalities with low or very low marginalisation, which have higher levels of population

¹⁸ <http://cat.microrregiones.gob.mx/catloc/Default.aspx?tipo=clave&campo=mun&valor=24>.

density (San Luis Potosi State Government, 2004). According to the 2000 Census, 10.23% of the states population is indigenous. The share of the state's population living below the different poverty lines (food, capacities and assets) is above the national average (Table 2).

Table 2: Population living below the different poverty lines (%)

	Food	Capacities	Assets
Mexico (national average)	18.2	24.7	47.0
San Luis Potosi state	25.7	33.3	55.5

Source: CONEVAL (2008).

There are important educational gaps in the state: 11.2% of the population above 15 years of age is considered illiterate (above the national average of 8.8%) and 34.1% does not have complete basic education. The state's average level of education, 7.1 years of schooling, is below the national average (San Luis Potosi State Government, 2004). Coverage of primary health services is close to 99.7%, but access to secondary and tertiary health care is limited, particularly for populations in marginalised rural areas, since advanced health infrastructure is concentrated in urban localities. In 2005, an estimated 50% of the population in the state had access to some form of health insurance (64% of these had IMSS and 21.4% had access to *Seguro Popular*), which means that close to 50% of the state's population remains without access to health-related social protection (INEGI, 2006). With respect to basic infrastructure, 37.3% of homes do not have drainage or exclusive toilet facilities; 11.1% of homes lack access to electricity; 22.8% do not have access to running water; and 21.3% of homes have dirt floors.

Work opportunities, particularly well-paid ones, remain limited: 58.8% of the economically active population in the state receives incomes below two minimum wages. This is one of the main causes of poverty in the state and results in high levels of migration to the US and to other states. Approximately 26% of the population in the state (mostly men) migrate. This lack of productive opportunities has also been linked to growing problems such as crime, insecurity and rising drug and alcohol abuse. Despite low wages and limited opportunities, the unemployment rate in urban areas is among the lowest in the country (San Luis Potosi State Government, 2004).

There are several challenges limiting the state's economic potential. The industry's productive structure is not integrated into regional or national value chains; although there is ample tourist potential, resulting from a wealth of natural resources, tourism infrastructure is still underdeveloped; and, lastly, agriculture has shown low productivity, limiting its capacity to compete with national and international markets (San Luis Potosi State Government, 2004). For individuals in the state, some of the impacts of the economic crisis have included: low productivity; loss of jobs (many resulting from temporary plant closings, and thus are not permanent); migration in search of jobs; and school abandonment, although these effects have not yet been quantified.

Lastly, with respect to gendered vulnerabilities, socioeconomic indicators for the two research sites are generally lower for women than for men than at the national level, as illustrated in Table 3. Nevertheless, the situation in the state seems to be evolving. Although the Gender-Related Development Index (GDI) for the state is lower than the national average, it has been improving at a more rapid pace. Whereas the national index grew by 1.93% in the 2000 to 2005 period, the GDI for the state grew at a faster rate, of 3.27%, indicating a positive evolution in gender development, with gaps slowly narrowing (UNDP, 2009). This might be triggered by more proactive actions by the state to promote gender equality, with an emphasis on fostering women's access to work opportunities and decision-making roles in the government. For instance, the State Coordinating Office for Women was created in 1998, with a role in promoting women's rights in the state as well as creating spaces for women in the labour force. Similarly, State Electoral Law has strict rules on the enforcement of gender quotas in the State Congress.¹⁹

¹⁹ http://enlamira.inmujeres.gob.mx/index.php?option=com_content&view=article&id=197&Itemid=119&edo=24.

3.4.2 Vulnerability profile in the two research sites

According to our qualitative research, and drawing on official statistics available for the two research sites, major risks facing men and women include limited availability of job opportunities – particularly in the formal sector – and precarious and unreliable conditions of existing jobs. These result in lower and more uncertain incomes. Both sites are relatively small, semi-urban localities and, although they share some characteristics and have similar levels of development and social marginalisation, they have clear differences.

Many households in the municipality of Tamazunchale still rely on agriculture and have been affected by low productivity, drought, low market prices and high transactional costs in getting products to markets, resulting in limited earnings or losses. However, most of the population is employed in the tertiary and secondary sectors. The municipality of Zaragoza is 31km from the state capital and, although roads are narrow and public transport is limited, many men and women work in the city during the day. In both localities, specific jobs vary between men and women, and may include transport (drivers of lorries or smaller commercial vehicles), construction work, petty trade, garbage processing and reselling of recyclable trash, work in manufacturing plants and domestic work (which is quite a common alternative for women).

Low levels of education lead to important vulnerabilities. Only 6% (male) and 6.9% (female) of the population 15 years or older has complete basic education in Chapulhuacanito, and 8.5% (male) and 6.18% (female) in La Esperanza. This limits the possibility of finding better-paid working opportunities. It also links to other social vulnerabilities, as discussed in the section above.

Table 3: Overview of research site characteristics

Municipality	Zaragoza	Tamazunchale
Total population	22,425	93,811
Male population	10,896	46,594
Female population	11,529	47,217
% of male population residing in a different state in 2000	0.38	1.6
% of female population residing in a different state in 2000	0.35	1.5
% of population residing in US in 2000	43	105
% of population below food poverty line	42.9	50.6
% of population below capacities poverty line	51.9	60.0
% of population below assets poverty line	72.4	79.5
Illiterate males 15 years + as % of population	4.5	11.9
Illiterate females 15 years + as % of population	6.7	
Males 15 years + with incomplete basic education as % of the population	12.5	13.2
Females 15 years + with incomplete basic education as % of the population	14.4	13.3
% of population with some form of health insurance	45.0	42.0
% of houses with dirt floors	20.4	43.8
% of houses without access to piped water	31.9	55.9
Level of marginalisation*	High	High
Main livelihood sources (economically active population)	56.3% mining, construction and manufacturing ; 28.6% trade and services; 9.5% agriculture	42.5% agriculture (beans, maize, oranges); 39.7% trade, tourism, services); 15.5% secondary sector
Community	La Esperanza	Chapulhuacanito
Total population	1,763	3,318
Male population	844	1,640
Female population	919	1,678

% of male population residing in a different state in 2000	2	47
% of female population residing in a different state in 2000	2	64
% of population residing in US in 2000	18	3
Illiterate males 15 years + as % of population	6.0	4.9
Illiterate females 15 years + as % of population	8.1	7.5
Males 15 years + with incomplete basic education as % of the population	11.5	12.3
Females 15 years + with incomplete basic education as % of the population	13.1	15.4
% of population with some form of health insurance	80.1	60.8
Level of marginalisation*	High	High

Note: *Level of marginalisation can be very low, low, medium, high and very high, calculated based on a set of indicators including level of schooling, access to basic services, quality of housing, income.

Source: CONEVAL (2008a); INEGI(2005); www.e-local.gob.mx; and <http://cat.microrregiones.gob.mx/catloc/Default.aspx?tipo=clave&campo=mun&valor=24>.

Our qualitative research in both localities, but particularly in La Esperanza, pointed towards the significant health and economic risks posed by diabetes. Several interviewees spoke about deaths or prolonged hospitalisation and treatment resulting from diabetes, which had cost families a significant amount of money. Even if respondents had some form of health insurance (including *Seguro Popular* or social security), the cost of additional medicines, transport to hospitals in the city and foregone income was highlighted as an important source of income loss. Although we did not interview anyone who had gone through this process without access to social health insurance, only 50% of the population has access, so it is clear that the economic shock would be intense.

With respect to social risks and vulnerabilities, a significant difference between the two localities is the level of community violence. Chapulhuacanito seems to be a peaceful locality that has become urbanised only in recent years, with a greater sense of social cohesion (interviewees referred to interactions with many people in the community, although not necessarily in terms of social capital or networks). La Esperanza was reported by all interviewees to be very violent. Most interviewees, male and female, agreed that there were many tensions between families, and that, because most men were armed, this generated a level of social tension that made life in the community stressful. Parents mentioned that they feared letting their children out of the house during weekends because most men in town were drunk and armed, so violent fights were not uncommon. This links with more reports of domestic violence by women in La Esperanza. Although statistics are not available (as there are no support services available and women rarely report this), respondents cited domestic violence as a problem among women more frequently than in Chapulhuacanito.

Another interesting observation is that, despite La Esperanza being more urbanised, being closer to the capital city and having slightly higher average levels of schooling, women in Chapulhuacanito participating in our research seemed more empowered, more economically active and to perceive a greater equality between men and women. This may result from the fact that more community development programmes have reached Tamazunchale municipality. According to figures provided by the state's Department for Social Development, in 2009 the total number of beneficiaries of federal social development programmes in Tamazunchale district was 14,776, against 3,822 in Zaragoza. Although this represents a similar share of the municipalities' populations (around 16%), it is likely that beneficiaries are concentrated in some communities and that such programmes have an impact on non-beneficiaries as well. Interestingly, according to the State Coordinator of the *Estancias* programme in San Luis Potosi, as a result of ethnic background and historic location, women in the Eastern Highlands (Tamazunchale) have a reputation for being stronger and more empowered than women in the Southern Plains (Zaragoza) of San Luis Potosi (Authors' interview with San Luis Potosi Programme Coordinator).

Box 2: Gendered intra-household vulnerabilities

The research underscored still significant inequalities in the roles and social position of men and women, both within and outside the household. It is important to note, however, that, because the subjects of our qualitative research were beneficiaries of the *Estancias* programme – women who are undertaking paid work and have their children in childcare – they are not necessarily representative of the majority of women who do not work outside the household and who have a more traditional perspective of women's role as carers. Nevertheless, findings still indicate important gendered vulnerabilities. Through the life histories, it was possible to see how some of the vulnerabilities related to traditional gendered roles have started to change, particularly as women become income earners and gain access to further levels of education.

In line with national-level findings by the Gender and Poverty Observatory, we observed that many women living with their spouse/partner face limited decision-making power, particularly with respect to working outside the home, which requires men's permission. Main reasons why men do not agree with women's work are: they think children should be cared for by mothers; they fear women will attract other men; and they do not want the community to think they are unable to sustain the household with their income:

'[Most people in the community]... think it's wrong for women to work outside the home and that, I don't know, as if you go to work it's because you like another man or something'(Married adolescent mother, La Esperanza).

Many women also have to seek their husband's permission to leave the house for most non-routine purposes, including to socialise with friends and family:

'He wouldn't let me go out. He would get upset. Once, there was a meeting at our child's school and I went. He came back early and got very upset when he couldn't find me. We argued, he asked me why, if many of the other mothers didn't go to the meeting, I had to be so responsible as to go to one' (Single mother, La Esperanza).

Early marriage and pregnancy are quite common in these two communities, resulting mostly from young women's and men's desire to elope to be able to engage in sexual relationships at a young age. Pregnancy is also used as an excuse to leave the family home where parents – particularly fathers – tend to be very strict. In most cases, couples are the same age. Our interviews highlighted the difficulties adolescent girls face when they marry at a young age or become mothers: they are pushed to leave school, generally without completing basic education, and to acquire new responsibilities with which they are unfamiliar. This limits or eliminates options and opportunities for future development.

'Well, I was studying, I finished second year of secondary and I gave birth just after I finished. After a few months I started the third year but I was unable to finish because it was very difficult to leave the baby with someone all the time. Back then the Estancias programme hadn't yet started' (Single adolescent mother, Chapulhuacanito).

Our interviews and FGDs with women in both communities indicated that they face violence, primarily domestic violence (physical and emotional) but also violence in the community. Very few of the interviewees spoke about violence directly, but many of them talked about it indirectly. They mentioned women experiencing it in the community and the difficulty they found raising their voice for fear of their husbands, as well as for embarrassment about how they would be perceived by others. Many of them linked intimate partner violence with men's alcoholism.

'Before Oportunidades, they would give money to men but they would go spend it at the bar... and they would spend it all. Now, they say, they give the money to women, but that has increased the number of cases of violence: "OK, so they gave you the Oportunidades money? Give it to me!" and when the woman doesn't want to give it to the man because she wants to spend it on the children, there goes the blow' (Single elderly woman, Chapulhuacanito).

'In this town, men take girls at a very young age and some men are real bastards with them... there are some that really mistreat them, and I think the girls are the ones who suffer most' (Married adolescent father, La Esperanza).

Our interviews found that, in general, the couple makes decisions jointly with respect to use of household income:

'She is the one who decides, I give her all the money, and I don't know after that'(Married man, La Esperanza).

However, in some cases, women explained that their spouses keep part of the income they earn to spend on their own consumption, which can include alcohol. For example, a married woman in Chapulhuacanito, whose husband had recently come back from nearly two years in the US, said that her husband drank quite a bit but justified him: *'He doesn't spend much, he spends minimum around 200 pesos [\$15.92] every time he drinks...so per day.'* But when we asked how much she spent on food, she said approximately 1,200 pesos (\$95.53) a month: they have four children. Clearly, it is less than what he spends drinking.

A few of the women interviewed were single household heads, because they were single mothers, widowed or abandoned by their spouse. Although they recognised that this situation generates economic hardship, some of them felt relieved not to be living under their spouse's pressure, and felt they had more autonomy:

'Now I can go out wherever I want, I can do what I want in my house. When he was here I couldn't, because he wouldn't allow me to go out, he would get upset... I was always worried that he would come back. And now I am very comfortable without him' (Single mother, La Esperanza).

Although decisions over care of children seem to be taken as a couple, there were many cases, in both communities, in which respondents said that their husbands were not happy with the idea of sending the child to childcare. This was mainly because they thought they were better cared for at home with their mothers, despite it limiting the options for women to work or continue studying. Given that our respondents were all users of the *Estancias* programme, they had all been able to influence their husbands' opinions, but they spoke about some cases where this had been hard or impossible:

'I would tell her "you can make some money... and you can leave your daughter at childcare", but no, she said, my husband doesn't want to, so she resigned' (Single older woman, Chapulhuacanito).

Lastly, despite a general perception of the imbalance between the roles of men and women, significant changes in these patterns were identified by respondents themselves. Similarly, we were able to observe these changes when interviewing people of different ages, levels of education and exposure. In particular, in cases in which men and women had more years of schooling, were married at an older age and had more communication, women felt more empowered and were able to make decisions about undertaking paid work with the support of their husbands.

There was also a difference in perceptions about the need for women to study between older interviewees and younger ones. Whereas older men and women recognised that women's education was less important in their day, which had led to many women not even having complete basic education, both men and women supported the education of younger girls, at least so that they could complete basic education and, when possible, pursue further levels of education. Although this perception may be somewhat linked to progress in the perception of gender equality, it may also be related to the increasing realisation that, particularly in the context of economic hardship and rising male unemployment, women's income can be a significant contribution to household income. In some cases, women's incomes were saved to use in the future to build a small house or ensure children's further education. This is encouraging, as it would seem to suggest a slow but certain evolution towards a more important role for women in the community:

'Given how much I suffered and how much I struggled, I say: "I don't want you to suffer as much as I did. Since you have the possibility of your husband letting you work, you should take advantage of it so your children can get further in life"' (Widowed older woman, Zaragoza, referring to a conversation with her daughter-in-law).

3.4.3 Coping mechanisms in research localities

In order to cope with the abovementioned economic and social vulnerabilities, qualitative findings and quantitative data available for these localities suggest that households rely on a wide range of coping mechanisms, from formal/government social protection mechanisms to informal coping strategies.

One of the formal social protection mechanisms available to many people, particularly women, in the localities is the *Oportunidades* cash transfer programme, of which the majority of our interviewees and many FGD participants are part. The programme has expanded and it now includes nutrition support and subsidies to reduce the cost of electricity to poor families, in addition to the more common cash transfers to promote children's school attendance. As a result, there are numerous beneficiaries in these communities, including households with small children, which may receive the programme's energy and nutrition supports.

Although the *Estancias* programme is still small in scale, between 15 and 25 households have benefited in each community, which has enabled women to seek paid employment or more stable jobs. Among the other common social protection programmes are the *70 y Mas* unconditional cash transfer programme for senior citizens and the *Procampo* cash and in kind-support for agricultural landowners.²⁰

As indicated in Table 3, close to 80% of the population in La Esperanza and 60% of the population in Chapulhuacanito have access to social security or social health insurance, which helps them cope with health-related risks. Those who do not have social health insurance have found it much harder to cope with health risks, having to sell assets or incurring debt. This was the case of an older woman, now widowed, in Zaragoza, who had lost her husband after three years of severe diabetes, with multiple stays in the hospital and treatment for the last six months to a year prior to his death. She originally used her son's social security coverage, but this support ended after several months of treatment, so she had to incur debt (through a local moneylender) to be able to continue paying. She was supported by her children and used all the savings she had from a period of time her family had spend in Mexico City processing and selling garbage for recycling.

Family support – including from parents, children, in-laws, siblings and extended family – is a very common informal coping strategy, but many respondents and FGDs pointed out that social capital outside the extended family is weak, and there is no support from local community groups (including a dearth of women's groups).

Although some women facing a situation of vulnerability mentioned borrowing money to mitigate the impact of economic risks, most of them used the money to invest in micro/small business – for example selling old clothes, selling shoes by catalogue or setting up a small corner shop. They were aware that the interest rates of these micro-lenders were significant (up to 4% or 5% a month), but had no access to cheaper credit. This is partly why interviewees explicitly mentioned that they avoided incurring debt for everyday or crisis expenses: debt would become unsustainable.

In La Esperanza, male migration to the US is quite common as a coping mechanism. Many of the men interviewed had been in the US once or twice before, and several women had husbands or other family members who were in the US at the time of the interviews. This is despite the fact that, according to their accounts, crossing (illegally) to the US costs close to \$2,000, often financed by family members in the US who link migrants with a job. Remittances are recognised as a very importance source of family income, often spent on children's education, as well as on buying land, building a home or making home improvements – respondents viewed migration to the US as the easiest (if not the only) way to save for such major expenses. Many of these migrants come back, explaining that they prefer life in Mexico; others stay back, leaving their families behind and cutting them off from remittances, rendering women very vulnerable.

In Chapulhuacanito, migration is generally to other Mexican cities, primarily to Monterrey, which is one of the most economically dynamic cities in Mexico. In this community, many women also migrate, mostly to become domestic workers in Monterrey and to send back money to help with the

²⁰ For more details about these programmes, and about which benefit women, please see Annex 1.

care of their family. This type of migration is more likely to be temporary. In this regard, responses from interviewees were aligned with other studies on migration in Mexico.

An increasingly common coping mechanisms, which highlights the growing relevance of the *Estancias* programme, is women's work. Although a few of the women interviewed and in FGDs said that they chose to work as a means of self-realisation, the majority replied that they worked to increase household income, either because their spouse's income was insufficient or because they were the sole earners. Although it has been more common for single women (single mothers/divorced/widowed) to work, as confirmed by statistics at the national level, an interesting observation in the research sites was a growing number of women taking up paid work in response to the consequences of the economic crisis in the past two or three years, which have included husbands' unemployment and an increase in the prices of basic goods and services, making it hard for households with children to rely on a single income.²¹

Having mapped out the gendered patterning of the main economic and social vulnerabilities and coping strategies at the national level as well as in our research sites, we now turn to a more in-depth discussion of the *Estancias* programme. In the next section, we look at its objectives and the extent to which it is addressing identified gender-specific vulnerabilities, touching briefly on elements of other formal social protection programmes that have relevant gendered impacts in the household and sometimes at the community level.

²¹ During our field research, we found no evidence of children – and in particular girls – having to spend more hours undertaking domestic tasks or working outside the household as a coping mechanism to respond to changing work and income-generating needs within the household, but there is evidence of this happening in Mexico. See, for example, http://www.unicef.org/mexico/spanish/proteccion_6928.htm.

4. Social protection responses to gender vulnerabilities: The gender focus of the *Estancias* programme

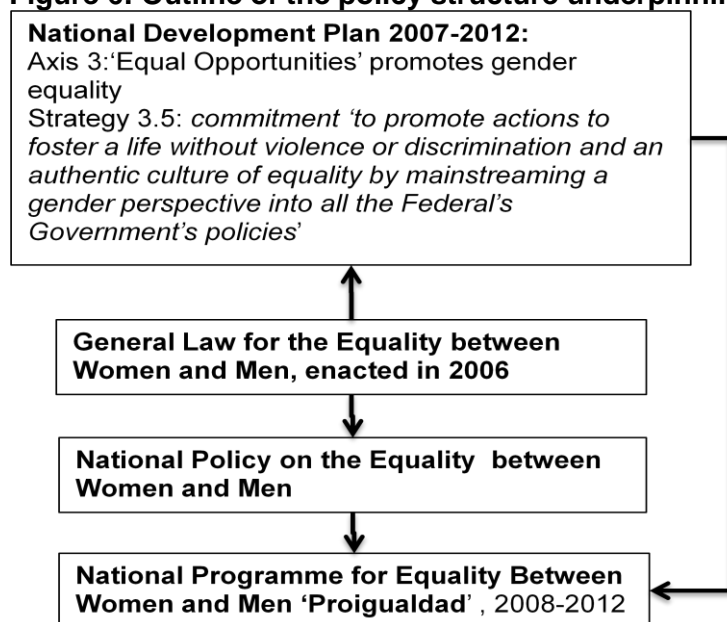
In this section, we explore some of the gender impacts of the *Estancias* programme. This is an important and innovative social protection programme aimed at supporting equitable access to work opportunities for an important vulnerable group: mothers of infants who are under a threshold of poverty. Before focusing on the programme, we provide a brief overview of the current gender focus of social protection in Mexico, to contextualise the development of this programme.

4.1 Engendering social protection in Mexico

4.1.1 Progress in gender mainstreaming in national development policies

Important progress has been achieved in terms of mainstreaming gender into policy discourse and in the design of public policies in a range of sectors. In the National Development Plan (2007-2012), the promotion of gender equality is underpinned by Axis 3: Equal Opportunities, which has an explicit objective of eliminating any form of gender-based discrimination and the need to guarantee equal opportunities for men and women to develop and exercise their rights (Federal Government, 2007b). Strategy 3.5 of the NDP expresses the commitment 'to promote actions to foster a life without violence or discrimination and an authentic culture of equality by mainstreaming a gender perspective into all the Federal's Government's policies.' Although there are specific elements of gender analysis and mention of the need to achieve gender equality across other strategic objectives of the NDP, its gender perspective is more clearly articulated by the National Programme for Equality between Women and Men (*Proigualdad*). This is a specific programme framed under the NDP to guarantee gender responsiveness in the federal government's actions (Federal Government, 2008).

Proigualdad is designed to convey the principles and strategic actions set out by the Federal Law on Equality between Women and Men, enacted in 2006, which set the stage for the National Equality Policy. Under this law, INMUJERES was formed as the body in charge of ensuring the implementation of the policy, for which *Proigualdad* is a key instrument. Ultimately, it aims to ensure that all public policies are designed, implemented and evaluated to guarantee their positive impact on women. For this purpose, *Proigualdad* includes a series of monitorable indicators, baselines and goals for its seven strategic objectives, which include: guaranteeing women's right to a violence-free life; strengthening the capacity of women to increase their opportunities and reduce gender disparities; and fostering women's economic agency in favour of greater opportunities for their well-being and development (Federal Government, 2008). Thus, even if *Proigualdad* does not make an explicit link between gender and social protection, these strategic objectives can be linked to the different dimensions of social protection included in the conceptual framework we draw on for our analysis: preventative, protective, promotive and transformative.

Figure 6: Outline of the policy structure underpinning gender in social protection in Mexico

Progress in the conceptualisation of gender equality in Mexico is illustrated by an emphasis on gender equality as a key element of development, as well as the push to ensure gender mainstreaming in all dimensions of public policies conducive to development. Other positive steps towards a more comprehensive approach to gender in public policies have included a better dialogue between the executive and legislative branches, with strong leadership by the Gender Commission in Congress and INMUJERES, resulting in changes to legislation and policy (Authors' interview with General Director of Evaluation and Statistical Development, INMUJERES) and progress towards gender-sensitive budgeting, with commitments from the Federal Ministry of Finance and Public Credit (SHCP) to including budget indicators in budget legislation. From 2009, there has been an annex to the budget that earmarks resources for programmes aimed at promoting equality between women and men – an important step prior to mainstreaming a gender perspective across the budget (INMUJERES, 2010).

Despite the advances made, challenges remain in more effectively integrating a gender perspective into policy design and implementation. There is still limited understanding of gender among many policymakers, which results in inadequately informed policy design. This is illustrated by the fact that many programmes for women do not necessarily have a gender perspective, which underlines the need for better awareness of differences in gender roles, including a clearer recognition of the obstacles posed to women's development by their unpaid work burden (Authors' interview with General Director of Evaluation and Statistical Development, INMUJERES). For instance, although the government's successful cash transfer programme *Oportunidades* has been recognised for channelling cash transfers to women as a way to promote their empowerment and their participation in household decision making, it has also been criticised for emphasising women's role as sole caretakers, since they are responsible for ensuring children go to school, taking them to health checks and attending health and nutrition workshops, among other care-related activities. This might conflict with their availability to hold a paid job or reduce fathers' incentive to become more involved in children's care (Authors' interview with e.g. Representative for UNIFEM in Mexico).

Additional limitations include the ineffective use of existing knowledge and evidence on gender in the implementation of policies and the great heterogeneity between state-level legislation and policies dealing with gender, which means that, despite national laws, their rollout in the states can be limited (ibid). Since its inception in 2007, INMUJERES has actively promoted gender policy by providing important strategic and technical support to gender policy development; however, because it has no executive powers, all actions and recommendations need to be agreed with

executive agencies, which can limit its impact. Although clear steps are being taken to mainstream gender at different levels of the policymaking process, this has not yet permeated into all programmes, action plans and, importantly, capacity development plans, which would contribute to a better understanding of what it means to implement programmes that impact positively on equality between men and women (Authors' interview with General Director of Evaluation and Statistical Development, INMUJERES). *Estancias* is an example of a more gender-responsive design in a public policy that better responds to identified vulnerabilities faced by women.

4.1.2 Visibility of gender in social protection in Mexico

Mexico's social protection policy objectives are integrated into different policy documents and legislation such as *Vivir Mejor*, the document that articulates the federal government's social policy, and the Social Development Law. These underpin a range of interventions to address vulnerabilities of different population groups, generally with an aim to promote their development as a means to more sustainable protection.

There are many social protection programmes being implemented. Some of the most important ones are *Oportunidades*, a conditional cash transfer programme which reaches approximately 5 million households, targeted at poor households to reduce their level of poverty and increase their uptake of basic social services in order to promote their human development. The social health insurance programme *Seguro Popular* is designed to fill the health insurance coverage gap left by formal social security; it provides affordable health financing coverage priced according to households' level of income, with the poorest exempt. There is also a range of productive transfers, for example *Procampo*, a mixed cash and in-kind support to farmers to increase the productivity of their land. In terms of transformative social protection, there is also comprehensive legislation enacted to guarantee equal rights of individuals, such as the Federal Law on Equality between Women and Men.

These and other social protection programmes have been implemented with mixed results. Some are quite positive (*Oportunidades*); others are less so. As part of the federal government's mandate to evaluate all national-level social policies, the majority of these interventions are being or have been evaluated to assess their impact on their target populations, and some of them have been redesigned in response to evaluation results to better serve their objective.²²

Some critiques of the approach to social protection taken by the Mexican government during the past 10 years argue that providing such an extensive range of programmes for the population in the informal sector provides incentives for workers and employers to continue engaging in low-productivity, more insecure, informal activities. According to this argument, by providing an alternative, the government relieves the pressure on employers to register and make contributions to social security on behalf of their employees, while workers benefit from some social protection without having to make any tax contributions (Levy, 2008). In this way, the two-tiered system contributes to keeping a greater share of the poor in the informal sector. Nevertheless, until an overhaul of the social protection system is made to ensure universal coverage, as Levy (2008) proposes, the existing range of social protection programmes available to the poor and vulnerable provides important coverage to a population which would otherwise not have access to mechanisms to cope with risks.

As such, the existing set of social protection interventions articulates the government's efforts to address the multiple dimensions of vulnerability facing different segments of the population. In terms of a more strategic approach, these social protection interventions fall into different objectives of the NDP and *Vivir Mejor*. The NDP Equal Opportunities axis provides the strategic underpinning for social protection actions by focusing on poverty reduction, comprehensive human development and attention to priority groups. More specifically, NDP Objective 17 focuses on

²² Information about social protection programmes and results of their evaluations can be found at www.coneval.gob.mx/.

‘reducing the marginalisation and increasing the pace of development of vulnerable social groups to enable equal opportunities that will allow them to develop.’ This objective outlines a series of actions aimed at strengthening social protection, such as: enhancing social security; providing support and opportunities for the elderly and the disabled; identifying and taking action to protect vulnerable children; and developing social protection networks through which the government can support community-based or civil society initiatives that are better able to help mitigate vulnerabilities (Federal Government, 2007a). Given the crosscutting nature of social protection interventions, some can also be found in other areas of the NDP.

In line with the NDP, *Vivir Mejor* underpins the current framework for social protection. One of its objectives is ‘to grant protection and certainty to people and communities to face shocks, including those related to life course vulnerabilities or those that arise as a result of adverse external conditions.’ The framework focuses on three lines of action: increasing basic human development capacities; consolidation of a social protection network; and establishment of links that enable sustained and sustainable social and economic development.

The social protection network in particular frames actions to meet the needs of particularly vulnerable population groups. Under the policy, networks are meant to serve as mechanisms to coordinate and implement different programmes aimed at reducing vulnerabilities that result from gender inequalities, age, ethnic background or economic or natural shocks, highlighting that, in order to develop these networks, a mix of government actions and social support is needed. Although gender inequalities are mentioned as a source of vulnerability, there is no explicit gendered approach in six out of the seven strategic actions targeted at vulnerable groups, including children, the elderly and the disabled: only one of them focuses on women victims of violence and abuse.

Social protection approaches are also outlined in two other *Vivir Mejor* lines of action: Access to Social Services and Economic Opportunities also have dimensions of social protection to guarantee access to population groups that are typically marginalised, contributing to reducing vulnerability. Under these two strategic objectives there is a more visible gender-responsive approach, by referring explicitly to guaranteeing women’s equal access to social services and equal opportunities to enter the labour market – a commitment to which the *Estancias* programme is linked.

There are multiple gender-responsive social protection programmes in Mexico. Some focus on advancing the situation of women, including: the Programme of Scholarships for Young Mothers and Pregnant Young Women (*Promajoven*, set up by the Federal Ministry of Public Education (SEP) to support young women to continue studying, reaching 3,755 young women in 2008 and 7,643 in 2009 (INMUJERES, 2009); the Programme for Equal Working Conditions between women and men designed by INMUJERES in coordination with the Federal Ministry of Labour and Social Security (STPS), aimed at pushing for equal pay for equal jobs, to reduce segregation in types of jobs and positions and to reduce discriminatory practices at work (ibid); the Microfinance Fund for Rural Women (FOMMUR), designed to enhance access of poor rural women to microfinance services to help them participate in productive activities, to develop the habit of saving and to learn business skills to improve their living conditions, targeted at women above 18 years of age as well as any mother or pregnant woman older than 15; and the enactment of the Law on Violence Against Women in 2007, which has served as a basis for the National System for Prevention, Attention, Penalisation and Elimination of Violence Against Women, which coordinates the design and implementation of projects and actions geared towards eliminating gender-based violence, with interventions by both government and non-government actors.

A mapping of the main social protection programmes which impact on women in Mexico can be found in Annex 2.

4.2 Gender dimensions of the *Estancias* programme

4.2.1 Overview of the *Estancias* programme

The *Estancias* programme was launched during the first half of 2007. It is a subsidised childcare service for women under a defined threshold of poverty (1.5 minimum wages per person in the household) who are working, looking for work or studying. It is implemented by SEDESOL through its delegations in each of the 32 states, and by the government agency responsible for child protection and development, DIF, which is also responsible for providing training and building the capacity of the heads of *Estancias* (typically the owners, who are responsible for its services) and their assistants, as well as carrying out inspections to ensure the *Estancias* are well-maintained, clean, child-friendly spaces.

The childcare centre must give an eight-hour care service and provide children with two hot meals and a snack, rest and play time, as well as early development/stimulation, although the methodology for this is not fixed, so the choice depends on the head of the *Estancia*. The revised operating rules, published at the end of 2009, establish that there must be at least one adult per eight children, and a maximum of 60 children per *Estancia* (Diario Oficial, 2009).

The programme has three modalities of support:

1. Childcare subsidies to mothers who are working, looking for work or studying. This applies also to single fathers who are responsible for the care of their children (a minority of beneficiaries);
2. Promotion of new childcare centres under the *Estancias* model;
3. Development of a network of childcare centres. These networks include *Estancias* that have been newly created under the programme and other childcare centres which already existed and joined the programme by providing subsidised services to children of mothers who qualify. Centres under the network must comply with programme rules and standards, as set out in the programme's operating rules, to be good quality childcare services assessed periodically by programme staff and following a training programme, in order to continue receiving government supports.

To obtain the subsidy, mothers must state their income to verify whether they are under the poverty threshold and submit a letter that explains whether they are working, looking for work or studying. However, as discussed later in more detail, there is currently no formal way to verify this information, leading to some cases of inadequate targeting. If they meet the conditions for the subsidy, they are given a certificate to be used to register their child in the *Estancia* of their preference within the registered network. The *Estancia* in turn claims the subsidy directly from the government as long as the child attends regularly. SEDESOL provides newly formed *Estancias* with an initial transfer to cover set-up costs, including building rehabilitation and the purchase of materials for children. *Estancias* already in operation that join the network receive a lower subsidy, to be used to ensure the building meets safety and quality standards set by the network.

Box 3: Core objectives of the *Estancias* programme

General objective

The programme's objective is to contribute to reducing the limited access and low permanence in the paid workforce (generally in the informal sector) of mothers who are working, looking for a job or studying, as well as single fathers responsible for the care of children, by providing a subsidy to access childcare services for children aged between one and three years 11 months (one day before turning four, when they can be admitted to pre-school), or one and five years and 11 months in the case of children with a disability. The subsidy is provided to a maximum of three children per household. The programme is targeted at households with monthly incomes up to 1.5 times the minimum wage²³ per capita (maximum of six minimum wages per household), which is just above the national income poverty threshold, and which do not have

²³ The minimum wage in Mexico for 2010 is approximately \$4.40 per day, or \$88 for a 20-day working month.

access to childcare services provided by formal social security structures, namely IMSS (for private sector employees) and ISSSTE (for government employees). The programme also aims to increase the supply of childcare spaces for children.

Specific objective

The programme aims to support eligible mothers and single fathers so they can have time available to access the labour market or so that they can continue studying.

Quality standards

The national DIF and SEDESOL coordinate and/or conduct short capacity-building courses (from one week to one day, depending on the subject) on issues related to the care of infants as well as on the operation of childcare centres – for example accounting, basic management, emergency response and first aid. Where relevant, third parties can be contracted to conduct these courses. Heads of *Estancias* must take all these courses; at least one assistant per childcare centre must also attend most of them.

To guarantee quality standards, there are regular supervisory visits to childcare centres by personnel from SEDESOL and DIF. These include an initial set-up visit to verify that the centre meets all the programme's requirements before starting. Periodic visits focus on monitoring whether the centre is in compliance with quality standards and regulations set out in the programme's operating rules. Elements monitored include regular attendance of children, quality of meals provided, adequate treatment of children, type of care and stimulation being provided to children and general hygiene and security conditions of the centre, among others. If the *Estancia* is not in compliance with the norms, it can be dismissed from the programme.

Source: Diario Oficial(2009).

In the first two years of operation, the programme increased its coverage significantly. The programme had 1,500 *Estancias* by July 2007 and as of December 2009 there were 9,061 centres reaching approximately 241,019 beneficiaries (mostly mothers) and 261,862 children (CONEVAL, 2010b; INMUJERES, 2009). This means that after three years the programme cares for more children than social security (IMSS and ISSSTE) run childcare services (SEDESOL, 2010).

With respect to the location of childcare centres under the programme, 68% of *Estancias* are located within communities classified as having very low levels of marginalisation. This means that they are located mostly in urban communities that have access to basic services and secondary services, and that therefore present better-off economic and social indicators. Only 6% of *Estancias* are located in communities with high levels of marginalisation. La Esperanza and Chapulhuacanito are among these. Regardless of the level of marginalisation, *Estancias* still target the poor.

Table 4: Location of *Estancias* according to communities' level of marginalisation, 2009

	Very high	High	Average	Low	Very low	Total
Number of <i>Estancias</i>	96	488	785	1,408	5,883	8,660
Share of total	1%	6%	9%	16%	68%	100%

Source: Authors' own estimates based on data provided by *Estancias* programme.

The programme's annual budget for 2010 is 2.6 billion pesos (\$207.3 million) (approximately 0.08% of the total budget for 2010). It has been growing in line with the number of beneficiaries, and has a goal of reaching 9,010 *estancias* by the end of 2010 (INMUJERES, 2009). Its continued growth in line with higher demand, however, is limited by the availability of budgetary resources.

The amount of the transfer/subsidy is determined according to the beneficiary's level of income. Households with monthly incomes of up to 1.025 minimum wages per capita receive a subsidy equivalent to 700 pesos (\$55) per month/per child. For households with monthly incomes from 1.026 to 1.5 minimum wages per capita, the subsidy is equivalent to 450 pesos (\$35) per month/per child (Diario Oficial, 2009). It is estimated that the cost of the programme to the *Estancia* is between 1,000 and 1,200 pesos per child, so the government subsidy covers between 58% and 70% of this cost (ASF, 2010). Each beneficiary is responsible for a co-payment to cover remaining

costs. This is variable, depending on the costs of the *Estancia*; it has been reported that some heads of *Estancias* reduce the co-payment for mothers who are unable to pay the full amount.

Although the programme was originally targeted only at women (single or with a partner/husband), over time it has expanded to increase single men, recognising that there are a number of men who are responsible for the care of their children and who also require this support, which is a significant accomplishment in terms of recognising men's changing roles. Still, male beneficiaries remain a very small minority of programme beneficiaries.

4.2.2 Gender dimensions of *Estancias* programme design

Estancias was explicitly designed to fulfil a gender equality objective – more so than a child development objective – although in practice it has been doing both (ASF, 2010; SEDESOL, 2010). It is framed by the National Policy for Equal Opportunities articulated in the NDP. Objective 16 proposes the 'elimination of any type of gender-based discrimination and the need to guarantee equal opportunities for men and women to develop and exercise their rights.' More specifically, Strategy 16.6 refers to the 'need to facilitate women's access to labour markets through the expansion of the Network of Childcare Centres to Support Working Mothers' (Diario Oficial, 2009). As such the programme aims to address some of the important social and economic vulnerabilities facing women in Mexico: their limited participation in the workforce and as a result their reduced income-generating capacity, largely reflecting their marginalisation in domestic and caretaking roles, lacking support to reduce the burden of these activities, as explained in Section 3.

Similarly, *Vivir Mejor* conceptualises *Estancias* as a way to 'elevate the productivity of individuals so that they can have better employment options resulting in better incomes that can allow them to reduce their levels of poverty' (Federal Government, 2007a), which suggests that women are seen as pivotal in contributing to household income and poverty reduction. Based on the programme's design and referring to the framework for social protection in Section 2, the programme is both promotive and transformative, as it aims to enable the development of capabilities and income generation, as well as addressing concerns over gender equity.

The programme thus intends to make an important contribution to gender equality by highlighting that care functions have an economic value, despite women typically undertaking these responsibilities without pay. It also acknowledges that women's more active participation in the labour market requires supporting mechanisms that can relieve them from some of the domestic and caretaking responsibilities that are generally attributed to them (INMUJERES, 2009). Although in practice the programme makes a contribution to changing the role of women, the programme's name seems to emphasise that those care responsibilities are women's, so it is mothers who require this support: greater reflection by users on sharing caring roles could be triggered by targeting the programme explicitly at 'working parents' and promoting a shared responsibility for care when both parents live together. The recognition of single fathers as caretakers in need of support is already a step in this direction. A more profound transformation would imply not only that women participate more actively in the workforce but also that men contribute to reproductive and domestic roles, reducing women's time poverty.

Although it is commendable that the programme makes gender equality goals explicit, currently, indicators that measure the impact on beneficiaries are not explicitly disaggregated by sex. Although the main beneficiaries of the programme are women, such sex-disaggregated indicators would be useful to have a better understanding of the impacts of the programme on both men and women. Similarly, indicators on the number of children registered in *Estancias* are not sex disaggregated. During interview, the SEDESOL Programme Director mentioned that neither SEDESOL nor DIF had yet made or commissioned any explicit assessments on the programme's gender impact.

In addition to supporting beneficiaries' entry into or continuation in the paid workforce, the programme's design opens the door for women's participation in an additional way: most heads of *Estancias* are women who, through the programme, have become micro entrepreneurs. Only a small minority of heads are male. Additionally, the childcare centre provides young women in the community work opportunities as assistants. The programme has been recognised as generating approximately 46,400 sources of employment (INMUJERES, 2009). However, a valid feminist critique of the programme suggests that this perpetuates the role of women in care functions (Authors' interview with e.g. the San Luis Potosi Programme Coordinator). Still, the programme responds to a reality whereby women are overrepresented in the field of education and child development, and so provides them with a way to have their own small business or job in the community.

A broader gender-based critique of the programme has been that it perpetuates women's participation in the informal sector by providing them with an alternative to formal social security benefits, which would be linked to a more secure, contract-based job (Cimacnoticias, 2008). According to the programme's operating rules, beneficiaries should not have access to childcare centres provided through formal social security, which suggests that they are either in the informal sector or self-employed (including in agricultural activities). Given the nature of the labour force in Mexico and the size of the informal economy, beneficiaries are very likely to be in the informal sector. The critique thus contends that the government is eluding its responsibility to extend social security coverage to women who use and work in *Estancias* by providing them with this simpler alternative. This confusion may result from poor programme communication: a recent report by SEDESOL clarifies that women with social security entitlements, that is, in the formal labour market, can use *Estancias* if they meet the programme's income criteria and do not have access to social security-provided childcare despite being entitled to it – in 2008, there were 1,562 social security-operated childcare centres against the more than 8,000 *Estancias*, which highlights the deficit of social security-provided childcare. A related problem is that most young women hired for assistant positions are not formally contracted, that is, registered as formal employees contributing to social security, and generally have very low salaries (ASF, 2010; Santibañez and Valdes, 2008), adding to the problem of informality for working women in Mexico. There have been some discussions about making registration of assistants compulsory, but this has not yet been incorporated into the operating rules.

4.3 Impacts of social protection programmes in the research sites on individuals, households and communities

This section looks at the impacts of the *Estancias* programme on beneficiaries and their households, focusing on gender impacts and drawing on existing assessments of the programme as well as on the fieldwork carried out in San Luis Potosi. We also point out some of its current and potential contributions to community dynamics, as well briefly looking at the community-level impact of some other social protection programmes which had more penetration in the communities visited and which also contribute to reducing gendered vulnerabilities.

4.3.1 Impacts of the programme on beneficiaries and their households

There have been several assessments²⁴ of the *Estancias* programme since 2008. Most of these agree that, despite some small problems in its implementation in a few childcare centres (some of

²⁴ Evaluations are being prepared in 2010, including a full external impact evaluation and an evaluation by the National Institute of Public Health (INSP) (SEDESOL, 2010). At present, assessments include a statistically significant survey on the perception of beneficiaries commissioned by SEDESOL, which included a sample of 2,910 beneficiaries; a supervision to 49 *Estancias* and survey of 494 beneficiaries carried out by the state's auditing body to verify administrative data submitted by SEDESOL and DIF for an official audit of the programme (ASF, 2010); an analysis of a sample of 1,870 *Estancias* in every state, assessing the quality of services provided (Santibañez and Valdes, 2008); and a gender impact evaluation carried out by a civil society observatory, supported by the Ministry of Public Service which promotes social audits (SFP, 2009).

which are outlined in Section 4.3.4), the programme has performed well. For example, according to a survey of perceptions of programme beneficiaries carried out in 2009 by external evaluators and published by SEDESOL, 99% of beneficiaries replied they were satisfied with the service and felt that *Estancias* were a safe place to leave their children while they worked (SEDESOL, 2010). Similarly, a survey commissioned by the Federal Auditing Body (ASF) showed that 72.3% of beneficiaries considered the programme to be 'very good' and 26.7% 'good.' Only 1% thought it was 'average' (ASF, 2010).

Our research findings concur with these assessments. Respondents expressed a satisfaction with the programme in several areas, as can be seen in Box 4. First, many women believed the programme had given them the opportunity to engage in paid employment, allowing them greater autonomy and the opportunity to improve household income. Second, safe and secure childcare conditions at *Estancias* give peace of mind to mothers and single fathers who already work and who had to opt for more precarious childcare alternatives before the programme. And third, most interviewees were enthusiastic about the programme's positive impact on child development. The gender impact evaluation by a civil society observatory found that beneficiaries perceived the main benefit of the programme to be economic (44.8%); 28.4% found the main benefit was related to impacts on their family (including intra-household dynamics); 11.8% thought the main benefit was social; and 11.2% replied that it improved their self-esteem (SFP, 2009)

Box 4: Impact of *Estancias* on beneficiaries (mothers/fathers) from selected communities in San Luis Potosi

Women and men interviewed agreed that, with the help of *Estancias*, they were better able to access job opportunities which have resulted in greater household income.

'The childcare centre [can help me] be able to go to work and make the money I need to go on' (Adolescent mother, La Esperanza).

'I think so, the programme is very helpful, if I got another job I could work all week because I have somewhere to leave my children' (Single mother, La Esperanza).

'Well, I started working... I had more resources... I could buy more things that I needed' (Female FGD, La Esperanza).

'Now my wife is working and so I like [the childcare centre] because it takes a weight off my shoulders... I don't find it as hard to make ends meet and the little girl is ok' (Adolescent father, La Esperanza).

One of the most salient advantages is the peace of mind parents find in leaving their children in a safe environment for a fixed number of hours, without needing to worry about hurrying home to pick them up early. This allows women in particular more mobility, and makes it easier for them to find more stable jobs.

'Yes, it has helped me because when I need to go to San Luis [to buy shoes to sell] I don't have to leave with the worry... in the childcare centre I know at what time I need to pick her up' (Married mother, La Esperanza).

'I would go to work with more peace of mind because I knew my son was well taken care of... you don't have to be rushing because you asked someone to take care of the child' (Female FGD, La Esperanza).

'I can do many things now. I can go out and visit my mother. I need to go pick her up but I know my daughter is well taken care of' (Female FGD, La Esperanza).

'[It has helped me] a lot; I trust the teachers at the centre with the care of my child. I don't have to worry about whether she ate, if she falls, everything is taken care of... I can go to work and know my child is safe' (Adolescent mother, Chapulhuacanito).

'Yes, the childcare centre is helpful ... there were times that I would go to work worrying that my mother had to be in her office with my children running around, which could cause her problems' (Single father, Chapulhuacanito).

'The childcare centre gives us, working mothers, a very good service. It provides strong support because we know that the centre is there and that we can leave our children, so we don't have to worry as much' (Female FGD, Chapulhuacanito).

A further benefit has been the impact on children's development, given that the children of most beneficiary parents would not have had access to early childhood development services until pre-school, at four years old. All beneficiaries interviewed were pleasantly surprised at the impact the childcare centre has had on their children, as opposed to them staying at home or being cared for by a friend or relative.

'Now she just started pre-school and she already knows some colours, she knows how to count, how to draw; she knows more than the rest of the children' (Married woman, La Esperanza).

'Since the girl started going to the childcare centre she started learning lots of things; she now knows many things she didn't know when she was living at home – she hadn't even learned to talk. She started talking just after starting at the centre... so I do feel that it has helped her a lot' (Adolescent mother, La Esperanza).

'My daughter didn't want to eat before going to the childcare centre because she was never hungry and since she started attending day care she started putting on weight. She now eats more because she has more activities and gets hungry' (Female FGD, La Esperanza).

'He developed better and socialised more with other children, so when it was time for him to start pre-school he was OK, he didn't cry like others' (Single father, Chapulhuacanito).

'My son only wanted to be alone, with no one speaking to him, he was always scared and wouldn't speak. But at the childcare centre he met little friends and started socialising and lost his fears' (Single mother, Chapulhuacanito).

Evidence from assessment of the programme and from our research indicates that there has been a positive impact on women's participation in the labour force, either by being able to start a job for the first time or, more frequently, by being able to access a more stable job (Santibañez and Valdes, 2008). Several women interviewed reported having problems with employers in the past as a result of unstable care arrangements that would cause them to miss work. Although most respondents in the two research sites had been working before the programme – although some in unstable jobs – an analysis by a civil society observatory with a coverage of 13% of *Estancias* in all states highlighted a change in women's occupations as a result of the programme: 50.9% of beneficiaries surveyed said that they had a paid job prior to the programme and 70.6% replied they had a job after participating in the programme; 28.3% of respondents said they were housewives before the programme and the number went down to 4.6% after the programme; similarly, 94% of women reported an increase in income as a result of the programme (SFP, 2009).

It is worth highlighting, however, that the types of jobs that women are able to obtain as a result of *Estancias* have not changed significantly. First, to continue benefiting from the programme, women need to have a low income (1.5 minimum wages per household member or less), so beneficiaries are necessarily working in low-paid employment. Additionally, as explained above, most women have jobs in the informal sector (no contracts or social security benefits) or are self-employed. As the programme's inception took place at the same time as the economic crisis, there have been limited labour market employment opportunities for these women. Several interviewees were self-employed in petty trade, including selling used clothes, shoes by catalogue or food on the streets; one woman was a promoter of a savings and loans scheme. Most were employed as domestic workers and only a few had work in a shop or in a factory.

We found no cases of women who were using the programme to pursue their studies. Other assessments have also found only a few women who have used the programme for this purpose: only 0.2% of women were using the programme to continue studying, according to the ASF (2010). Mothers of young children living under the programme's poverty threshold may find it very difficult to use part of their time to study, particularly as they need to work to sustain their child. As a result, there may be little interest in using the programme to study rather than to work. An adolescent

mother interviewed in Chapulhuacanito mentioned that, if the *Estancia* were open for a second shift at least some days of the week, she would consider continuing her studies. However, because she needs to generate an income, there is no chance of studying during the normal working hours of the *Estancias*. Given the competing needs of and time demands on beneficiary mothers, the duration of the childcare centres' shifts may in part limit the broader programme aim to empower and increase the productive capacity of women, to help them get better jobs through more equitable access to higher levels of education.

With respect to changes in household dynamics, respondents living with their husbands or partners stated that they made most household decisions jointly before the programme, including those related to spending. Some noted, however, that husbands generally keep some money for their own expenses (which sometimes include drinking). This means that, in general, there have been limited changes in decision making on household issues as a result of the *Estancias* programme. Similarly, according to a gender assessment by the civil society observatory, 88.3% of beneficiaries participate in decision making within the household (SFP, 2009), although it is unclear whether this is a change on their condition prior to the programme. This issue requires further study. On the other hand, the quotes in Box 5 point towards some important changes in household dynamics as a result of the programme, including women being able to make more decisions about spending on goods/services for themselves or their children.

The civil society observatory evaluation found that 83.9% of female beneficiaries felt the programme had improved their situation as women (SFP, 2009). Although the results of this evaluation do not clarify exactly what this means, it may be related to some of the factors identified in other surveys and in our research, such as greater capacity to earn an income, to make decisions about their own lives and to become more autonomous. For example, in our research communities, two interviewees who entered the labour force as a result of the programme noted that they saw this as a source of greater autonomy, and they proudly pointed out that they could now purchase their own things with their income. Interviewees also reported that having a dependable source of childcare allowed them to better manage their time. FGD respondents agreed that women who were hesitant to leave abusive husbands may have more incentives to do so once they can secure childcare support that allows them to work, although none of them had been through this situation themselves.

Several respondents noted that, after women had obtained a paid job, men had taken on some domestic and care activities, as noted by the quotes in Box 5 below. This is not a direct impact of the programme, since the programme has no specific sensitisation on such role sharing, and other women outside the programme may also have experienced a change in spouse's attitudes on joining the workforce. However, by promoting women's employment and providing support to their role as carers, *Estancias* contributes to an improvement in household dynamics and greater flexibility around the division of labour within the household.

Notwithstanding the positive changes highlighted above, we found no evidence of women beneficiaries being more participative in community decision making or trying to ascertain better jobs for themselves as a result of the programme. Therefore, although the programme does support women's increased economic autonomy and in some cases has influenced their capacity to negotiate some domestic activities with spouses, there is not enough evidence of it triggering a deeper transformation of gender roles and women's empowerment. This may be related to the fact that, in addition to facilitating access to paid work, the programme does not have any complementary actions to promote behavioural change and to foster non-economic empowerment.

Box 5: *Estancias* and intra-household dynamics

'[While I was at work] I would ask my husband to make the bed and sweep the floor... he would help me a little bit' (Adolescent mother, La Esperanza).

'When I wasn't working my husband would never help me but now that I work he does help me around the house, he helps me dress the children before I leave. So it has helped me' (Female FGD, La Esperanza).

'Sometimes women don't want to leave their husbands because they don't know how they would manage. But with this help you become more autonomous, you can work and generate your own income. Now, if I want to buy shoes I don't have to tell him, I just buy them' (Female FGD, La Esperanza).

'If she decides to work it's fine. I can't ask her to be locked up the whole time. She also has a right to work if she wants to' (Married father, Chapulhuacanito).

'He really supports the programme. In fact, he is the one that goes drop [the children] off and picks them up because I am working' (Female FGD, Chapulhuacanito).

'Heads of Estancias should have support at home as it is a very time-demanding job, with time spent in the centre and in training... it can cause tensions' (San Luis Potosi State Coordinator of Estancias).

A common source of tension within the household highlighted by beneficiaries was the unwillingness of some male spouses to enrol children in *Estancia* because they believe that they are better cared for by the mother. The availability of this affordable form of care, and in some cases the active engagement of the head of the *Estancia* in persuading fathers to accept their wives' enrolment in the programme, has enabled some women to negotiate their participation. Nevertheless, this does not necessarily imply a more profound change in attitude: two fathers of children enrolled in *Estancias*, one in each locality, said that they agreed with children going to the childcare centre because their wives had to work to contribute to the household income during a period of economic hardship, but if their incomes were higher they would prefer their wives to stay at home caring for the children. This suggests that, often, fathers' acceptance of spouses' paid work in place of care/domestic work is practical rather than reflecting their endorsement of women's choice regarding productive versus reproductive activities. Interviewees, including heads of *Estancias*, referred to cases of women in the community who were being held back from participating as a result of their husbands' opposition. There are also counter examples, with fathers' attitudes towards the *Estancia* changing to become more supportive, particularly after seeing their children's more rapid development.

The impact of *Estancias* on household dynamics is therefore mixed. On the one hand, for many women the change in role is likely to be long-lasting, particularly when they have gained decision-making space and autonomy in the household. Some female beneficiaries in the FGDs expressed that they would like to continue working after their children left the *Estancia* because they enjoyed the relative independence. In other cases, however, there was evidence of the programme providing temporary support for women to get paid jobs as a form of coping mechanism, and not triggering a profound change in domestic, caring and decision-making roles within the household. It will take longer than the three years – the time since the programme's launch – to be able to assess more permanent changes in relation to women's equality and empowerment.

4.3.2 Impacts of the programme on heads of *Estancias* and assistants

An important impact of the programme is the promotion of women as 'micro entrepreneurs.' Most childcare centres in the network are newly created and owned/managed by women. The incentive of having a guaranteed income and a broader client base resulting from the subsidy has triggered the interest of over 5,000 micro-entrepreneurs – mainly women – who have opened childcare centres throughout the country. As explained above, heads of *Estancias* are mandated to undertake regular training, not only in pedagogical and childcare practices but also in business management, which increases their skills and capacities beyond the programme. Further, while heads must have a minimum of secondary education, most of them have higher levels: an analysis of the quality of the *Estancias* found that 14% of heads had secondary education only and 86% had higher levels of education (38% had undergraduate degrees) (Santibañez and Valdes, 2008). In this way, *Estancias* has given women an important professional development opportunity in their community that they might not have had in their prior occupation. Data from the civil society

observatory evaluation revealed that 50.9% of heads were employees and 28.3% were homemakers prior to setting up the *Estancia* (SFP, 2009).

Despite a generally positive balance, some heads have faced problems related to the costs of running the programme and the time it requires from them. In practice, the revenue in many centres has been lower than planned, partly resulting from late payment of the co-payment as well as higher than expected running costs, rendering the subsidy insufficient. In fact, the evaluation by the civil society observatory noted that 79% of heads of *Estancias* reported an increase in income as a result of the programme but 20% had not experienced this. Additionally, 63% of heads surveyed said that they perceived the economic support from the government to be insufficient (SFP, 2009). Out of the two *Estancias* visited during our research, one was facing some financial constraints and the other was doing better financially. In Chapulhuacanito, the head expressed her concern about having to put in some of her own money to cover running costs; in La Esperanza, the centre seemed to be a 'better business' partly because it has more children. The *Estancias* Programme Director in SEDESOL explained that, from its design, it was clear that the programme might not be profitable for all heads (although they should be breaking even), but that its sustainability relied more on a sense of community action and of solidarity by heads. In fact, the civil society observatory evaluation found that, whereas the beneficiaries felt that the main benefit of the programme was economic (44.8%), only 28.6% of heads perceived economic benefits to be the most important, with 25.6% feeling that it was social (SFP, 2009). Heads at our two research childcare centres commented on the satisfaction from the work they were doing and valued the chance to help other women in the community find and keep jobs. However, although it is important to foster such social capital among women in the community, it is of concern that some heads of *Estancias* may be encouraged to work hard without a guarantee of adequate monetary compensation, particularly as they are not necessarily well-off. They have entered the programme to set up a small business and in most cases also require a small profit to contribute to their household income.

The San Luis Potosi Programme Coordinator reported that several heads complained of being overburdened, with long working hours and weekends devoted to the *Estancia*, which often meant that they found it difficult to carry out their responsibilities in their own households, including care and domestic work. This sometimes caused tensions with husbands. This is an important element for further analysis, as it suggests that programme design is adding to heads' time poverty, although it is unclear to what extent spouses have supported them in their domestic and care roles, relieving some of this burden.

Importantly, however, according to the civil society observatory, 77.1% of heads of *Estancias* found that the programme had improved their situation as women (SFP, 2009). Although the survey report does not provide details about what this means, it suggests a feeling of improvement of their role in the household and in the community.

As mentioned above, the centres have also generated some work opportunities for (mostly young) women in the community who work as assistants, although the jobs are usually informal and poorly paid, triggering a rapid turnaround of assistants (Santibañez and Valdes, 2009). If the programme is meant to support women's access to better work opportunities, this is an element that needs improvement.

4.3.3 Impacts of the programme on the community

The design of the *Estancias* programme was informed by a principle of community co-responsibility through which women would support each other to be better able to seize opportunities to increase their income and contribute to developing social networks (Authors' interview with SEDESOL Programme Director). However, the programme does not have mechanisms in place to actively foster these networks: for example, it does not have resources for sensitisation (including gender sensitisation) and it does not foster community dialogue or a space for mothers to exchange

experiences or seek support. In practice, support is provided by some proactive *Estancia* heads, who assume their de facto role as community focal points for women, mobilise some community members (mainly families) around the *Estancia* and can communicate important information to beneficiaries (Authors' interview with San Luis Potosi Programme Coordinator). However, this is dependent on the personality and level of commitment of the head of *Estancia* rather than being an explicit part of the programme's operation.

In the case of Chapulhuacanito, for example, the head of the *Estancia* actively encourages mothers with young children to participate in the programme (elderly woman, Chapulhuacanito; Married mother, Chapulhuacanito) and, when necessary, talks to their husbands to persuade them that their wives would benefit from working and that their children should enrol in the *Estancia* (Authors' interview with Head of *Estancia El Arcoiris*, Chapulhuacanito). In La Esperanza, beneficiaries spoke about the encouragement they receive from the head (Married mother, La Esperanza; Adolescent mother, La Esperanza). The head of the *Estancia* explained how she listens mothers' accounts of domestic violence and tries to refer them to the appropriate authorities, particularly as there are no counselling or protective services provided by the government or non-governmental organisations (NGOs) in the locality (Authors' interview with Head of *Estancia Estrellita*, La Esperanza). These informal initiatives by heads suggest that the programme can in fact be a useful entry point to develop social support networks for example, by promoting working women's information/discussion sessions on issues such as domestic violence or the changing roles of men and women in the household.

Given the evidence already available of the heavy work burden of *Estancia* heads in running the childcare centres, attending multiple training courses and being responsible for administrative and reporting work, a deeper reflection on how to encourage their role as women's focal points and promoters of networks among women in the community needs to be generated, so as not to impose additional time burdens on *Estancia* heads and in some cases beneficiaries.

Further, although the model of childcare centres set up by qualified men or women who have an interest in setting up a micro-business that is useful to the community, while taking advantage of government's financial support through childcare subsidies, has allowed for the programme's expansion, it is not without risks. As the programme expands, *Estancias* could become commoditised, with the potential not only of incurring quality problems, if government funding cannot keep up with training and supervision needs, but also, importantly, of losing its value as an element of social and community cohesion. *Estancia* heads could lose the personal rapport and ability to interact with women in the community as, in the presence of multiple *Estancias*, they could be seen as more like another small business owner than as a community focal and resource person for women. That is, there could be tensions between framing *Estancias* heads as micro-entrepreneurs while also implicitly expecting them to take on social mobilisation and networking roles, even if these are small in scope and scale. Although there is no evidence of this happening yet, this element should be accounted for in programme design, particularly if heads' roles continue to be seen as having the potential to promote women's social capital in the community.

4.3.4 Challenges to programme implementation

Programme design often faces challenges during implementation, as a result of socioeconomic, institutional and cultural conditions. Initial assessments and evaluations of *Estancias* have found some – albeit relatively minor – implementation problems, ranging from lack of a formal screening mechanism for targeted beneficiaries other than the questionnaire, to insufficient training offered or required from *Estancia* assistants, among others (e.g. ASF, 2010; Santibañez and Valdes, 2008). In this section, we focus on implementation problems found in our research sites that have implications for gender equality and access to decent work opportunities, which are among the programme's objectives.

One of the questions we asked beneficiaries was what they would change to improve the programme. Two answers were common and related to: i) the need to extend the hours of operation of the *Estancias*, since the workday for many women finishes after 4pm (closing time for the centres), which means that alternative arrangements have to be sought after hours or work opportunities need to be limited; and ii) the age limits on children in the childcare centres (between one year and three years and 11 months). Some interviewees need to work from earlier on in their children's lives, given that maternity leave is only for a maximum of three months, and typically is only six weeks, as the other six weeks are likely to be taken prior to birth. As such, women have to struggle with care arrangements before their child turns one. The upper age limit is linked to the start of children in pre-school (at four). Although there are public pre-schools available in most communities where *Estancias* operate, their hours of operation are shorter, so women have to find alternative care arrangements in the afternoons for young children of pre-school age if they want to continue working. This does not reflect a realistic understanding of working women's demands. Beneficiaries interviewed had not discussed these constraints with *Estancias* authorities (with whom they have no contact) and in some cases have only mentioned these concerns informally to *Estancia* heads. The State Coordinator was aware of some of these concerns based on discussions with *Estancia* heads during periodic meetings, but to date there have been no proposed actions to address them, partly as a result of budgetary constraints.

Increasing hours of operation and changing the age limits would impact on the programme's costs, and might render the current model unviable, particularly as demand continues to grow, requiring further budgetary resources. Nevertheless, this concern highlights that, although the programme has made an important contribution to women's increased participation in the paid workforce, their equitable access to the productive sphere is still limited by their reproductive responsibilities, making it difficult to achieve equitable access to work opportunities.

Estancia assistants being hired at low salaries and without being registered as formal employees with access to social security (for which *Estancia* heads would have to pay the employer's contribution) was mentioned as an important implementation issue, particularly as it contradicts the programme's principle of promoting access to decent employment for women. This is, however, linked to a broader constraint: *Estancias* are not always a profitable business for heads, and contributions to social security for employees may cause some of them to fail (Authors' interview with San Luis Potosi State Coordinator; Head of *Estancia*, Chapulhuacanito). A possible alternative would be for the government to increase the size of the subsidy to allow childcare centres to be better able to cover costs – not necessarily making them profitable but allowing them to break even – or for the programme to directly subsidise contributions to social security for assistants. Nevertheless, budgetary restrictions may mean that such adjustments are difficult to make, particularly in the short run. Alternative forms of financing such expansion, including, for example, private sector donations or contributions from local government would need to be sought.

As mentioned above, the programme requires a comprehensive range of training courses for heads, as well as some courses for assistants, including on administration, child development and first aid, among others, but there is no training on gender and/or gender sensitisation (Authors' interview with San Luis Potosi State Coordinator). This would seem an important addition to the programme, given that many of the issues around beneficiaries' use of *Estancias* in communities are linked to gender dynamics in the household. Such training could help heads of *Estancias* and assistants to better support women to negotiate their participation in the programme, as well as sensitising men on the importance becoming more involved and participating more actively in childcare activities within the household.

Programme implementation and training underscore an important interagency effort. STPS, through its 'first employment' programme, has supported the hiring of assistants in childcare centres, offsetting initial costs by providing three months of salary and training. The National Fund to Support Social Enterprises (FONAES), supported by the Federal Ministry of Economy to promote the creation of microenterprises among the poor, has provided training and information on

microenterprise formation and management. NAFIN, a national development bank, provides training on administration. The Red Cross gives a first aid course, and DIF provides training on child care and development (Authors' interview with SEDESOL Programme Director). Given that there are federal and state-level agencies, such as INMUJERES, which could provide technical support to develop a useful gender training module, there is an opportunity to build on this important dimension through further interagency cooperation.

The programme has not been designed to foster complementarities with other basic services. Nevertheless, by doing this, for example with the National System for Prevention, Attention, Penalisation and Elimination of Violence Against Women, *Estancias* could serve as an entry point for sensitisation among women, as well as identifying cases of domestic violence and abuse.

Overall, despite some institutional constraints, the programme has so far shown itself to be a successful model of more accessible provision of childcare (even more so than formal sector childcare services provided by IMSS/ISSSTE), with more checks and balances and supervision to ensure good quality services. As a citizen-driven initiative, it has the potential to become a social capital tool that yields some impact on stronger gender dynamics in communities. For example, in San Luis Potosi, the Programme Coordinator explained that *Estancia* heads were already mobilising to lobby for greater budget allocations, suggesting that they can play an important role in mobilisation of women in the community. The big risk lies in financial sustainability, which is underpinned by the political will of the federal government (both executive and legislature) to continue allocating sufficient budget resources to ensure its continued expansion and good quality operation, as has happened to date. This risk is even greater under the new opposition-dominated Congress, with the possibility of a change in governing party during the next presidential elections.

4.3.5 Access to other social protection programmes by women in the community

Given the multidimensionality of poverty and vulnerability, the working hypothesis of the broader gender and social protection project of which this research is part is that programmes need to take a multifaceted approach – either directly or indirectly through complementary linkages with other programmes. *Estancias* design does not explicitly consider these or links to basic services, although many beneficiaries are also part of other social protection programmes. Nevertheless, in this section we identify some potential for synergies with other programmes that could contribute to strengthening the gender and child well-being impact of *Estancias*.

Most beneficiary and non-beneficiary interviewees and participants in FGD in both localities benefit from at least one programme (generally *Oportunidades*), which underscores the need to understand how such programmes contribute to reducing poverty and vulnerability in the community, particularly in the case of women. This section therefore also presents a few interesting findings on the gendered and community-level impacts of a few other social protection programmes, their links to social services and, where possible, their potential complementarities with the *Estancias* programme. It also highlights some programmes that are absent and that could importantly contribute to more positive gender impacts.

An interesting finding from our research is that, despite relatively broad coverage of social protection programmes in these communities, informal social protection mechanisms are uncommon, beyond support from the extended family during times of hardship. This support very importantly includes remittances. This dearth of informal safety nets underlines the usefulness of formal social protection alternatives, although further research is needed to identify whether the presence of such formal safety nets has contributed to eroding informal and community-based coping mechanisms, as has been witnessed in other countries (e.g. Amuzu et al., 2009).

A significant number of interviewees receive some form of the *Oportunidades* cash transfer: those with younger children receive the food and/or energy support introduced in 2008 as a response to the economic crisis, whereas those with older children receive the *Oportunidades* scholarship. In

line with existing evaluations of *Oportunidades*,²⁵ among our interviewees the programme was seen as giving great support to women to purchase school uniforms and supplies for their children (Female FGD, Chapulhuacanito); to save money for the construction or upgrading of their homes (Female FGD, La Esperanza); and to ensure children continue going to school until they finish secondary (Married mother, Chapulhuacanito). Also, women have free access to some reproductive health services (Elderly woman, La Esperanza). Some younger mothers interviewed said that they had been able to finish secondary school largely thanks to the cash transfer (Adolescent mother, La Esperanza; Female FGD, Chapulhuacanito). There is thus evidence of significant contributions to household well-being, particularly that of women and children.

With respect to its possible link to *Estancias*, none of the respondents talked about using *Oportunidades* transfers to pay for childcare, including several *Estancias* beneficiaries. Prior to the creation of a subsidised childcare centre in the community, this could be linked to the lack of local childcare facilities or the fact that, without subsidised prices, their cost would have been unaffordable. The amount of the transfer for households with young children is lower than the transfer for households with children of school-going age, so is insufficient to cover the *Estancias* co-payment. This suggests that uptake of *Estancias* is independent of access to the cash transfer. Further, not all *Oportunidades* beneficiary women work, which excludes them from programme eligibility. Nevertheless, synergies between the two programmes could be fostered after children's 'graduation' from childcare, building on their important progress in early childhood development to ensure that they can continue their human capital development by guaranteeing access to pre-school, health services and adequate nutrition through an *Oportunidades* cash transfer.

Despite general favourable opinions about *Oportunidades*, it is important to highlight that there were many accounts of the cash transfer reaching households that did not need it, including those that provide false information about their incomes (Married man, La Esperanza) or in which some members have a position of influence (Female FGD, Chapulhuacanito). Some respondents also mentioned that other very poor households were missed out, and this seemed to cause tensions in the community. This coincides with findings from external evaluations of *Oportunidades*.²⁶

Many interviewees have access to different forms of social health insurance, either to the social health insurance scheme *Seguro Popular* or to formal social security (mainly IMSS) through their husbands. This has proved particularly important in mitigating financial risks related to costly illnesses – particularly diabetes, which is common in both communities (Elderly woman, La Esperanza) or in relation to hospitalisation of children (Married woman, La Esperanza). Those without such health-related social protection highlighted the high costs of accessing healthcare, particularly purchasing medicines for their children (Single mother, Chapulhuacanito).

Services to provide protection to women who are victims of abuse or violence are notably absent in both localities, and women do not know where to access them (Authors' interview with Head of *Estancia*, La Esperanza). This contrasts with information from state authorities, who mentioned recent initiatives to promote such services, including access by more remote communities (Authors' interview with the Director of the State Institute for Women). Domestic violence was mentioned as a problem in several interviews and FGDs in both communities (Female FGD, La Esperanza; Elderly woman, Chapulhuacanito). As highlighted before, *Estancias*, through the active agency of the heads, can be a point of reference for identifying cases of domestic violence (against children or women) and provide some guidance, channelling victims to where they can receive support and attention. For this, *Estancias* heads need adequate capacity building on how to deal with cases and what advice to provide to those who approach them (as we found in La Esperanza), as well as information on how and where to refer victims.

²⁵ *Oportunidades* external evaluations are at: www.oportunidades.gob.mx/Portal/wb/web/external_evaluation_results.

²⁶ For details about *Oportunidades* evaluations, please see www.oportunidades.gob.mx/EVALUACION/es/index.php.

5. Drivers of programme impacts

In this section, we explore some of the politico-institutional factors that have contributed to the development of the programme and to its successful implementation, as well as looking at other factors that would need to be addressed to increase the potential gender impact of the programme.

The *Estancias* programme was created at the outset of the new Federal Administration's term in office (2007-2012), and resulted from an initiative of the President and his team to promote a gender-responsive programme that could more successfully promote the incorporation of women into the labour market. It responded to an explicit recognition of the need to free up some of the time women spend on care and domestic responsibilities. By pursuing *Estancias* as a flagship programme, the government ensured its launch early on in 2007. This programme thus was part of several efforts by the federal government, such as promoting women's participation in productive projects and increasing their access to technical training, to increase women's economic empowerment. However, according to the Social Policy Advisor in the Office of the President, these positive steps are a result of the Administration's efforts and not necessarily of the institutionalisation of a gender perspective in policymaking throughout the country and at all levels. Of particular interest is the fact that the vision behind the *Estancias* programme was one of women's economic empowerment, not one that sought to promote their social and political empowerment. This limits the vision of gender equality in terms of work opportunities and other spheres of life. Although the aim of the programme is still relevant, the absence of these other dimensions in its design can be linked to the programme's dearth in practice of mechanisms to strengthen women's household roles and to translate women's increased economic agency into greater participation in the community.

Estancias is considered a priority programme by the current Administration. This status has helped ensure a continuously increasing budget that has enabled significant growth of the programme and the population reached. Nevertheless, this does not imply that the budget for other gender programmes has also been guaranteed (Authors' interview with the Office of the President's Social Policy Advisor). In the wake of the changeover in control of Congress to the opposition after the elections in the summer of 2010, it will be necessary to monitor whether the *Estancias* programme continues to receive the budget necessary to operate effectively, particularly as it is politically identified with the ruling party, which could reduce its clout in the coming budget approval period. Its sustainability will face an even greater challenge from 2013 when the next Administration comes into power. Although in recent years there has been a better record of continuing previous government's successful social programmes, as with *Progres a Oportunidades*, it is not clear that this will be the case after the next election period. For this reason, it is of paramount importance to consolidate a strong and objective evidence base on the programme's effectiveness and achievements so as to justify its continuation in the future.

In relation to the political context in which *Estancias* operates, given that it is a federal programme, there are some tensions related to execution between state government authorities, particularly in states where the ruling party is different to the one in power at national level, as noted by key informants. This is related both to political interests and budgetary allocations: *Estancias* is funded by earmarked federal resources which are transferred to SEDESOL state delegations to implement according to federal guidelines; these resources do not go through state government finances, where they could be allocated to other state social development priorities. Additionally, because the programme is performing well, it could bring the federal government (and thus the ruling party) political favour, which is not ideal for other political parties ruling some of the states. This is despite the fact that, by law, federal programmes cannot be publicly linked to any political party: in practice, the link is made implicitly. This has resulted in the limited involvement of state authorities in some states, which has implications for seeking synergies with state-supported initiatives to promote

gender equality and to better the condition of women. For example, initiatives to prevent and protect women against domestic violence are typically implemented by state bodies.

The State of San Luis Potosí place is governed by the ruling party, which makes coordination between federal and state programmes smoother. In interview, the State Minister for Social Development talked about a good working relationship with the state delegation of SEDESOL. This has enabled synergies in a range of social programmes, including *Oportunidades*. There is no direct collaboration on *Estancias*, but the positive working relationship fosters a more productive implementation context. Political obstacles that may have arisen in the implementation of *Estancias* in states where the ruling party is different from the federal government party have not been documented in any programme evaluations, and only some reference to these tensions was made by some key informants. However, given that evaluations have shown generally good programme performance throughout the country, such tensions are unlikely to have resulted in significant negative programme impacts so far.

As mentioned in earlier sections, there are no explicit synergies or complementarities planned with any other social protection or social development programmes. However, there is some scope for fostering these. One such example is the possible link to programmes providing support in the case of domestic violence, not only through the engagement of the *Estancia* head but perhaps also using the childcare centres for periodic dissemination and talks with women on this issue and mechanisms to address them, as well as to display information on where and how to seek help.

Additionally, since one of the programme's objectives is to support access to job opportunities for women, the ASF's assessment of the programme (2010) highlighted that there was no evidence of the programme promoting synergies with government or non-government actors to help women identify or access job opportunities. Although the federal government is planning some employment stimulation initiatives, links to *Estancias* are not currently visible. These could be strengthened by using the centres as points for dissemination on technical training opportunities, scholarships and new employment positions. For this purpose, state governments and non-government actors could play an important role, so better coordination with local authorities by state-level *Estancias* programme planners (who are part of SEDESOL) may result in more possibilities of achieving this objective.

Another important synergy could be the promotion of longer pre-school service hours, as well as ensuring that pre-schools are available in all localities with *Estancias*, to guarantee that children can effectively make this transition to continue building their development during this important period of their lives and that mothers can continue to access a form of support that allows them to stay at work for the time they require to maintain their jobs.

In addition to some of these politico-institutional barriers that can constrain the programme's implementation, a range of socio-cultural factors, briefly mentioned in other sections, are worth underlining again here, as they are important drivers of programme impact. The first includes adverse attitudes towards women's participation in the labour force. As we have seen, men are frequently unwilling to allow their wives or partners to work outside the household, and women frequently abide by this. Although there has been significant progress here, there is still evidence of this attitude, and it continues to limit the potential of a programme like *Estancias* to facilitate the access of many women to employment opportunities. Women themselves often do not have the drive to work outside the household as it is something they were never culturally conditioned to do, so more active promotion of the alternatives and opportunities available to them is necessary. Similarly, family and community attitudes which continue to see childcare as the mother's sole responsibility undermine the capacity for women to engage in other roles, and also limit the possibility of men being more actively involved in the care of their children, which would be key to achieving a transformation in household dynamics and a more balanced position of women in the household. These elements need to be tackled in parallel to providing opportunities through *Estancias* to make sure the programme can maximise its transformational potential and its reach.

6. Conclusions and policy implications

Subsidised childcare services are an important form of social protection to address vulnerabilities to economic and social risks faced by poor women with children. Our analysis of the *Estancias* programme has shown that it has fostered women's greater access to paid employment opportunities, helping them increase their income and in some cases access more stable forms of employment through formal childcare arrangements which allow them to better manage their time. Not only do higher incomes imply a lower level of monetary poverty, but also the programme has had positive impacts on women's self-esteem, agency and negotiating power within the household, in some cases leading to some level of empowerment.

However, evidence from the programme has also showed that access to affordable childcare and a paid job does not automatically transform gendered attitudes to the division of productive and reproductive roles between men and women, since men may continue to view work undertaken by women as a practical coping strategy, with no profound implications for their position or power in the household or their autonomy. Still, information from initial assessments of the programme suggests that women's entry into the paid workforce – and in some cases having the opportunity to continue studying – offers a good basis for this gender transformation, which can promote a more sustainable reduction in their level of vulnerability and dependence in a step towards gender parity.

Nevertheless, our findings suggest that some design features, and especially implementation practices, could be improved to increase *Estancias* programme effectiveness and fully harness its transformational potential. Here, we provide some conclusions with respect to programme policy design and programme implementation, and also some evidence-based policy implications for the programme going forward.

6.1 Policy and programme design

The *Estancias* programme focuses on certain dimensions of gender equality, namely, those related to women's economic empowerment resulting from access to the labour market, to better work opportunities and to the release of part of the burden of care activities for which women are typically responsible. Within these objectives, programme design is adequate, as evidence from several evaluations and from our research suggests. Many programme beneficiaries have started to work outside the home as a result of the programme; others have been able to access more stable and less precarious jobs as a result of having access to a dependable and stable form of childcare. However, more gender-sensitive indicators are critical to better measure programme gender impact.

The programme has had a greater effect at the household level than at the community level, in the case of both single mothers and mothers living with their spouses/partners. Our research highlights that this is manifested in greater autonomy over decision making on women's own expenses (decision making over household expenditure seems to have been made jointly in most households before the programme). There is also some initial evidence that men are more cooperative at home to support their wives in their new roles as income earners. This last finding is not widespread, but illustrates that a slow transformation of gendered domestic roles is possible. Otherwise, the programme risks promoting women's paid work outside the house without reducing the burden of domestic and care work for which they are responsible before and after their paid work, contributing to a triple burden which is not usually shared with men.

Also, with respect to changes in household dynamics, many women who access the programme have initially needed to be able to negotiate their participation with their husbands. Other potential beneficiaries have been unable to access the programme because of an engrained belief among

husband and others in the community that women should remain in the house and care for children rather than engage in paid employment. This is despite the fact that these same households may be poor and benefit from an additional source of income. Evidence suggests that these patterns are changing: some men whose wives were working recognised that they 'allowed' this to happen only because the money was needed for the household, given problems with male unemployment or shortfalls in income, but that if the economic situation in the household improved they would prefer their wives to stay at home. In contrast, some women who had recently started to work appreciated the sense of autonomy and self-assertiveness that such activities provided them: many stated that they would like to continue working even once the household economic situation stabilised. This mix of perspectives will need to be negotiated within households in order to ensure a more balanced agreement on the roles of husbands and wives. Information and sensitisation to support this would be useful.

The programme has been particularly positive for single mothers who have to work to sustain their children and who typically lack support to do this. This includes very young mothers who gave birth during their teenage years, as well as women who have been abandoned by their partners or husbands. This programme helps them better cope with the challenge of raising a child on their own while needing to earn an income. In this way, the programme also helps bridge some of the income and employment access inequalities between poorer women who cannot afford private childcare and better-off women who have better chances at jobs, as they can afford private childcare, which perpetuates such disparities.

On the other hand, despite the significant increase in access to work opportunities, there is a dearth of evidence suggesting that women have used the programme to continue to pursue their education. This indicates, on the one hand, the priority that work takes over education for mothers of young children who need to make ends meet. On the other hand, it underlines the challenges to human capital accumulation for women, particularly adolescent mothers. These differentials are starker for the poor, who have less access to other coping mechanisms that would allow them to study.

With respect to community-level impacts, although the role of the heads of *Estancias* is conceptualised as a form of social mobiliser of women participating in the programme, the multiple time and effort demands of *Estancias* limit the possibility of them doing this effectively. Such activities are also not included in the programme's operating rules. As a result, in practice this role of advising and supporting women participating in the programme happens only when there are more proactive heads.

Lastly, there are many dimensions of gender equality that are beyond the scope of the programme, for example availability of good jobs for women, limiting incidence of domestic violence, promoting women's greater community participation, among many others. As such, this programme should be seen only as one piece of a more comprehensive policy agenda to promote gender equality and, more particularly, in terms of social protection, to mitigate the vulnerabilities of women and protect those who are most vulnerable or at risk. Other programmes, initiatives and efforts by women themselves should help achieve a greater level of gender equality.

6.2 Implementation issues

Gender-sensitive programme design is a critical first step, but effective implementation requires strong political will and adequate investment in both human and financial capital in order to realise the potential of innovative programme design features. Although this commitment is currently in place and resources are flowing well, there is a risk that a loss in political support to the programme could limit its budget and render its operations more limited in scope and scale.

The programme's rapid expansion, in responding to high demand for services, has an important impact on its costs. This means that some useful changes to programme implementation to better reflect the needs of women, such as extension of centres' hours of operation or adapting the age of eligibility, might be unaffordable.

Findings on positive perceptions of the programme among many female and male beneficiaries relate to: access to higher incomes; peace of mind to go to work, sure that they are leaving their children in a secure and caring environment; and greater autonomy triggered by having slightly more economic independence. Very importantly, a finding from our research that coincides with other assessments of the programme relates to the significantly positive impact the programme has been having on early childhood development, particularly as these are children who would not typically have access to such a service. This leads to the conclusion that, despite the need for several small adjustments, the programme is performing well.

Finally, a huge challenge relates to the political will to guarantee programme expansion in response to demand, without lowering the levels of care, supervision, monitoring and training that have so far helped the programme be successful and while rendering the programme accessible to poor working mothers. Growth in demand for the programme is continuing to grow, and children are typically in it for three years, which indicates the need for a sustainable financial strategy.

6.3 Policy recommendations

In order to be able to measure more accurately the programme's gendered impacts, it is necessary to include gender-sensitive indicators in the programme's monitoring and evaluation framework, through which its performance is assessed and its impact is evaluated. Although many of these indicators need to be quantitative, in line with parameters for programme evaluation, the programme would gain from including some qualitative indicators as well. Some suggestions about the type of indicators that could be added include:

Quantitative: % increase in income among women beneficiaries; % of time spent on domestic and care responsibilities by men and women; % of women who continue working after their children graduate from *Estancias*; number of women beneficiaries who gain access to formal employment.

Qualitative: Changes in decision making over women's use of resources; changes in attitude towards women's participation in the labour force; changes in attitude towards women's role as caregivers.

Integrating gender issues into policy and programme design entails strengthening attention to gender dynamics at the household and community levels, as well as ensuring gender-sensitive mechanisms are embedded within programme operational mechanisms. As such, evidence from programme gender impact assessments should be used to improve programme design on a periodic basis.

For the programme to achieve a more comprehensive impact on women's well-being and gender roles by encouraging men to support women in their domestic and care responsibilities, changes in social attitudes to women need to be promoted. This can be done through careful sensitisation of both men and women. The *Estancias* programme, and the childcare centres in particular, could be used as a point of reference to foster broader communication and to disseminate carefully designed information to both men and women in the community, in order to promote this progressive change in roles. This is not something that the programme currently pursues explicitly; without it, the programme risks being partially responsible for the triple burden on women who start working as a result of their participation. This includes heads of *Estancias*, for whom there is evidence of very long hours and for whom involvement in the programme is highly demanding.

In this sense, the programme's operational mechanisms should reflect greater gender responsiveness. This could start by ensuring that *Estancia* heads receive training on gender so that they are better able to deal with issues they might face with beneficiaries, their families and children in the childcare centre, and to provide them with relevant information which could help them improve their roles. Indeed, the programme's gender impact on *Estancias* staff, as well as on beneficiaries and some other community members, might gain from gender and gender sensitisation training, perhaps through models designed by INMUJERES, for heads of *Estancias* as well as programme staff (such as programme promoters, SEDESOL supervisors and others).

Synergies between this federal government programme and state government initiatives, such as those to promote work opportunities, access to higher education, skills training and even protecting women against domestic violence (typically undertaken by state governments or NGOs) should also be fostered, so that this information has a more reliable channel through which to reach beneficiaries. Similarly, more systematic analysis on how the programme can better gain from complementarities with other services, such as access to pre-schools for children who graduate from *Estancias*, could increase programme impacts on women and on children.

With respect to the potential contributions of the programme at community level, and given that *Estancias* is conceptualised as a citizen-to-citizen support programme, there is the possibility of finding ways of providing complementary support to beneficiaries, including through the more active engagement of the head. However, given heads' multiple responsibilities, this could also be achieved by promoting networks among programme participants and support among beneficiaries. This could include setting up a space to discuss issues such as household dynamics, domestic violence or job opportunities they might know about, and perhaps even fostering savings groups, given that these would be mostly working women. One possible way to foster such networks could be by the head of the *Estancia* delegating one of the more active or engaged mothers to organise such initiatives, perhaps providing her with some suggestions so that mobilisation can take place woman to woman, contributing to their social and community-level empowerment, possibly with the support of the *Estancia* head and other programme staff.

Lastly, continued mobilisation of budget resources to support the programme is critical, and should be secured despite possible future changes in power. Until a different care model that works more sustainably in the Mexican context is found, the *Estancias* programme should continue receiving good levels of financing and technical support so that it can continue having a positive impact on poor mothers.

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Annex 1: List of interviewees

Interviewee	Position	Institution
National level		
Ana María Tepichín	Coordinadora del Programa Interdisciplinario de Estudios de la Mujer del Centro de Estudios Sociológicos	Colegio de Mexico
Monica E. Orozco Corona	Directora General de Evaluación y Desarrollo Estadístico	INMUJERES
Cristina Padilla Dieste	Directora General Adjunta de Equidad de Género y Desarrollo de Proyectos Estratégicos para el Desarrollo	INDESOL
Joanna Cristo	Encargada de Despacho de la Dirección General de Estancias Infantiles	SEDESOL
Mario Demian Sánchez Yeskett	Asesor en Política Social de la Presidencia de la República	Office of the President
Teresa Rodríguez	Directora Regional	UNIFEM
Marco Antonio Lopez	Jefe de Unidad de Planeación y Relaciones Internacionales de SEDESOL	SEDESOL
Luis Miguel Montaña	Oficial Mayor	SEDESOL
Thania Paola de la Garza	Director General Adjunta de Evaluación	CONEVAL
Ricardo Cesar Aparicio	Director General Adjunta de Análisis de la Pobreza	CONEVAL
Gabriela García	Directora de Programas Sectoriales en la Dirección General de Programas y Presupuestos 'B' de la Subsecretaría de Egresos	SHCP
State/municipal/local level		
Veronica Rangel	Coordinadora de <i>Estancias</i>	SEDESOL/San Luis Potosi
Jorge Viramontes Aldana	Delegado	SEDESOL/San Luis Potosi
Juan Gabriel Badillo Alvizo	Delegado <i>Oportunidades</i>	SEDESOL/San Luis Potosi
Maria Luisa Galvan	Secretaria	Secretaria de Desarrollo Social y Regional/San Luis Potosi
Teresa de Jesús Mendoza	Directora General	INMUJERES/San Luis Potosi
Laura Alvarado	Head of <i>Estancia Estrellitas</i>	La Esperanza, Zaragoza
Martha Alicia Salguero	Head of <i>Estancia El Arcoiris</i>	Chapulhuacanito, Tamazunchale

Annex 2: Mapping of social protection programmes with a specific impact on women

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
Social assistance (protection and productivity-enhancing measures)							
In-kind transfers. Three kinds of benefits: i) food aid (in-kind support:\$36 plus \$17 in cash to avert food price volatility); ii) orientation services; iii) food fortification products targeted to early childhood and women. Benefits allocated every two months. (Budget 2009: \$135 million).	Alimentary Support Programme. Started in 2004. Funded by federal government and implemented by <i>Diconsa</i> (a state-owned network of retail stores located mainly in marginalised areas. It has more than 22,000 business units. Their mandate is to guarantee food product supply in poor areas at competitive prices.)	Provides a bundle of products and services devoted to improve nutritional conditions, with a heavy emphasis on pregnant women and breastfeeding mothers.	Works in close coordination with <i>Oportunidades</i> and the Federal Ministry of Health and, in the case of natural disasters, coordinates with the Federal Ministry of Interior.	Contributes to the development of human capacities by improving the quality of nutrition of poor families that are excluded from <i>Oportunidades</i> .	Targeted to poor families (living under \$2a day) who live in marginalised areas where <i>Oportunidades</i> (see conditional cash transfers), a much broader intervention, cannot reach.	In 2008, it benefited more than 126,000 households, in 30 states of Mexico. Data disaggregated by gender are not available.	Covers sector of the population in marginalised areas that had not been covered before. An impact evaluation suggested that beneficiaries increased quality food consumption. In particular, infants treated by the intervention grew significantly more than those in the control group. No significant effect found in women.
Unconditional cash transfer. For Strata I and II of seasonal agriculture producers (agriculture cycles from spring to summer) the cash transfer is about \$85. For the remaining registered fields, the cash transfer is about \$70. The amounts are for each hectare in each agriculture cycle. From autumn to winter,	Procampo. Started in 1993, coordinated, funded and delivered by the Federal Ministry of Agriculture, Livestock, Rural Development, Fisheries and Food (SAGARPA). Created as a response to free trade policies which opened agriculture to external competition mainly through the North American Free Trade Agreement (NAFTA) in 1994. The aim was to transfer cash to rural producers and livestock farming producers in order to help them face	In 2001, <i>Procampo-Capitaliza</i> was created to allow beneficiaries to access future <i>Procampo</i> resources in order to capitalise on their units of production or implement modernisation. In contrast with <i>Procampo</i> 's original design, <i>Procampo-Capitaliza</i> wants to promote the productivity of	Main programme linkage is <i>Procampo-Capitaliza</i> , because <i>Procampo-Capitaliza</i> allows to <i>Procampo</i> beneficiaries to access future <i>Procampo</i> resources. Since <i>Procampo-Capitaliza</i> gives priority to small, indigenous people and female producers, it is probable that the programme improves access to	The objective is transferring cash to rural agriculture producers and livestock farming producers in order to support their personal finance situation. In this sense, the transfer was designed to increase the income of producers, not to improve their productivity, and then improve their welfare. The cash transfer is	For registering, producers should fulfil requirements established in the rules of operation, such as being part of a Centre for Support to Rural Development, and should request the cash transfer using a formal document. Producers, persons or enterprises have to sow legal products on eligible fields registered in the programme's directory. Additionally, they should	1,744,139 producers receive cash transfers from <i>Procampo</i> (2008).	Since bigger fields receive bigger cash transfers, the programme is regressive: poorer people receive less total money than richer ones. On average, the cash transfer represents 30% of the agriculture household income of beneficiaries. On average, the cash transfer helps to cover 21% of the total household expenses of beneficiaries. 38%

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
all registered fields receive \$70 for each hectare. For 2009, the total budget is approximately \$133.9 million. Gender issues are not considered in establishing the amount of cash transfers.	the possible negative impacts of NAFTA on family finance conditions. In this sense, it was originally a temporary programme to last only 15 years, to disappear in 2008. Nowadays there is a national debate about preserving the programme. It is highly probable that it will disappear in the following years. In its original design, cash transfers were not related to the productivity of beneficiaries.	beneficiaries. It is rules of operation give priority to small producers, indigenous people and female producers.	credit for those groups. But there is no available information about this.	delivered to producers who sow the eligible fields registered in a directory. There are no gender objectives.	maintain their fields. There are no gender variables taken into account for main program eligibility.		of beneficiaries believe that <i>Procampo</i> has helped them to increase production in their fields. Gender issues have not been explored in the evaluations of the programme.
Conditional cash transfer for human development. \$14.88 for family nutrition; \$4.19 for family energy consumption; \$20.99 per senior citizen; \$9.92-20.22 per child in elementary school per month and \$13.35 for school materials per year; \$29.38-37.78 per child in secondary school per month and \$25.19 for school materials per year;\$49.23-64.12 per student in high school per month; up to a	Oportunidades. Started in 1997, managed and part-delivered by the Mexican federal government (cash is delivered by the private sector).Funded by Mexican federal government. State governments and federal programme delegations are in charge of the implementation of education and health services.	Design incorporated an understanding of gender inequality in the household and was designed to increase women's empowerment in the household by targeting the transfer at the mother. In response to girls' lower education rates, girls receive a larger transfer to provide an incentive for parents to send girls to school.	Links to health, education and nutritional programmes through conditions. Mothers are expected to attend health care clinics to improve preventative health care behaviour. Recent changes include fathers' participation. <i>Oportunidades</i> is linked with the National Programme to Finance Micro-Enterprise (<i>Pronafim</i>), which gives credits to poor people with viable projects.	Contributes to breaking the intergenerational cycle of extreme poverty by promoting the development of education, health and nutrition of beneficiaries. <i>Oportunidades</i> also grants progressive education support in basic education and high school, with the purpose of increasing enrolment and regular attendance, as well as stimulating the completion rates.	Geographic targeting, communities with a high marginality score (according to official measures conducted by e.g. CONEVAL and CONAPO).National Coordination is responsible for collecting, processing and analysing the socioeconomic information of potential families. Mothers are the first-hand beneficiaries.	In 2008, 5,049,206 households (approximately 20,196,824 persons).Data disaggregated by sex are not available.	1. Education: Increased the enrolment rate (24%) in secondary school. Also increased years of schooling and number of students in transition to secondary school. Reduced failure rate (6.4%), school desertion (10.29%), ethnic and gender gap in years of schooling in elementary school in rural areas. From 1997-2007, increased years of schooling in indigenous girls. 2. Health: Increased the use preventative

Contributions of the *Estancias Infantiles para Apoyar a Madres Trabajadoras* Programme

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
maximum of \$169.46 per household per month.							health services. Reduced days of disease in children and adults. 3. Nutrition: Improved indicators of children's nutrition (low height and anaemia) and pregnant women (anaemia). (CONEVAL, 2008b)
Conditional cash transfers: public works. Pays 99% of the minimum daily regional wage (\$4).	Temporary Employment Programme (PET). The programme started in 1995, funded by the federal government. Regulations are established by SEDESOL, the Federal Ministry of Environment and Natural Resources (SEMARNAT), the Federal Ministry of Communications and Transport (SCT) and STPS. These institutions implement and deliver the programme at the national and sub-national levels.	Aims to promote gender equity in terms of equal opportunities for men and women. However, no means or actions are clearly specified.	Financial resources for job training can be provided and are assigned on case-by-case basis. Resources for tools and materials can also be provided.	Reducing the social impacts of unemployment and emergencies by transferring cash conditioned to participation in projects for family or community welfare, and taking into account gender and ethnic inequalities. Examples of commonly authorised projects are school cleaning, improvement of public spaces or reforestation.	Men and women 16 and older who experience income shocks owing to low labour demand or emergencies. Limited to communities of 15,000 or fewer; those with 5,000 or fewer are preferred. To be considered, candidates must present a work project that benefits their family or community, either individually or in groups. Institutions in charge judge the projects' technical viability subject to the programme's budget constraints.	In 2008, 156,716 men and women benefited. During the first quarter of 2009, 31,418 individuals participated. Of them, 34.8% were women. 33% of beneficiaries lived in the state of Oaxaca during this period.	266,585 jobs were created in 2005 and 88,844 in 2006. In 2006, on average 9.5 jobs were created for each approved project. In 2008, 6,841 projects were authorised and 156,716 jobs were created. 90.6% of the approved projects in 2008 were completed. During the first quarter of 2009, 1,031 projects were authorised and 31,418 jobs were created.
Child grant: For families with an income of four minimum wages per month (\$443.30) the	Estancias. Implementation began in 2007. Coordinated by SEDESOL, funded by the Mexican federal government and	Targets gender inequality in the work force by providing pivotal services for working mothers	Linked to the National System for the Integral Development of the Family.	Increasing access and permanence of women and single men with children in the labour force by	Women and single males with children one to four, (if child is disabled coverage is extended till six)	226,119 children served by the day care centre network in 2008. By September of 2008,	Because the programme is recently created, tangible results have not been identified by

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
federal government contributes up to \$50.66 per month. Those that earn 4.1 to 6 minimum wages per month (\$443.30-664.98) may receive up to \$33.28 per month. To increase the network of available centres, the government provides \$2,539.50) to entities looking to open this type of business and \$1087.68 to businesses that are already open and wish to belong to the network.	delivered and operated by SEDESOL's representations in each state and by DIF.	and single fathers with children. It also promotes the supply of day care service by providing direct cash transfers to the owners of these businesses (amount depends on the number of children attending). Day care service guarantees the nutrition and well-being of infants as well as increasing the likelihood that parents/guardians/tutors will be able to participate in professional training and job search.		providing day care services.	may opt for day care services provided by affiliated businesses. To expand the network of providers, the government promotes potential day care businesses by allocating resources to open this type of business with a one-time monetary grant and a per child subsidy. To access the network, parents should go to the facility closest to them.	approximately 7,700 day care centres were affiliated. By the end of the year, it is estimated that this number grew beyond 8,000.	external evaluations. Currently, only the design of the programme has been evaluated and it is generally praised because of the kind of services that it provides to working mothers. It also reveals that the creation of this programme has allowed the parents and tutors of 200,000 children to take advantage of day care services.
Child grant: Depending on the budget allocated per state, the grants are in the range of 32 to 46 pounds per child.	Programme for Quality Schools (PEC): Direct Investment and Strengthening of Schools. Recently created as a pilot for the 2008/09 school cycle; funded by the federal government, it requires allocation of at least \$290,048 per state and allows private businesses/institutions to donate funds. Implemented by SEP. Funds must be invested in the infrastructure of the school, technical	Does not target gender inequality. Instead, it focuses on areas of the country with highly marginalised populations with schools of poor quality in urban or rural areas of the country.	Linked to its precedent programme, Programme for Quality Schools (PEC), and operated as an extension of it.	Contributing to the educational achievement of students attending marginalised and deficient elementary schools by providing technical and basic training for educators, school administrators and parents. Emphasises an improved relationship between actors to	Currently in a pilot stage in six states. Selection criteria for schools based on level of marginalisation of the population and scores of students obtained by a national evaluation which intends to measure their level of knowledge.	In the 2008/09 school cycle, 368 schools were beneficiaries of the programme with approximately 57,787 students in 50 school zones.	No results/outcomes are available for this programme.

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
	training for education officials and parents and school materials.			increase efficiency and efficacy of schools. Aims to raise quality standards of schools and make easier their identification and solution. No gender-specific objectives.			
Social pension. Survivor pension (mandatory individual account and social insurance): monthly pension is equal to 90% of the pension based on the individual account paid or payable to the deceased. The survivor pension ceases if the widow(er) or partner remarries or cohabits with a new partner, and a lump sum is paid. Remarriage settlement: lump sum equal to three years' pension. Constant attendance allowance: Up to 20% of the pension may be paid to a widow(er) or a partner. Orphan's pension	IMSS. Managed by a general assembly, technical council, oversight commission IMSS administers the programme through regional and local boards. Started in 1943 with 1995 (social insurance), 1997, 2001, 2004, 2005 and 2006 amendments. Funded by beneficiaries, government and employees in the following way. Insured person: 1.125% of covered earnings for old-age benefits, plus an average 0.625% of covered earnings for disability and survivor benefits and an additional amount for administrative fees.	Part of the mandatory individual account and social insurance system for formal private sector workers. Beginning 1 July 1997, all workers must join the mandatory individual account system, and the social insurance system is being phased out. There are no contributors to the social insurance system. At retirement, employees covered by the social insurance system before 1997 can choose to receive benefits from either the social insurance system or the mandatory individual account system. Gender	Links with other social security benefits such as sickness and maternity, work injury, day care centres, loans for housing, unemployment, family allowances, old-age allowances and survivors' allowances. Does not have any other direct link with gender equity programmes.	Contributing to overcome the social backwardness facing adults over 70 years of age, widow(er)s, orphans and unemployed workers through cash transfers.	Formal private sector workers: old-age pension: age 65 (men and women) with at least 500 weeks of contributions. Unemployed workers' pension: aged 60 to 64 (men or women) with at least 500 weeks of contributions. Retirement from covered employment is necessary.	Total beneficiaries of social pensions 16, 259, 911. 15% of the population.	There are no impact evaluations.

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
(mandatory individual account and social insurance): 20% of the deceased's pension is paid for each orphan younger than age 16 (age 25 if a student, no limit if disabled); 30% for a full orphan.		inequality is not considered in the design.					
Social pension. Beneficiaries receive \$38 a month, workshops and training.	70 y Más. Started in 2007. Funded and managed by the federal government through SEDESOL; cash transfers are delivered by the private sector. It targets the elderly, aged 70 and above.	Does not target gender inequality. Instead, focuses on vulnerability of the elderly located in communities with high marginality.	Not linked to other programmes or services.	Contributing to overcoming the negative social bias facing adults over 70 through cash transfers, social participation through workshops and information groups to promote welfare.	Geographic targeting. Communities with fewer than 30,000 with a high marginality score; citizens over 70 and people who are not part of <i>Oportunidades</i> .	1,800,000 people. Disaggregated data not available.	In 2007, the programme collected information for the baseline; aims to have an impact evaluation with two observations in time. So far, no results/outcomes of the programme.
Social pension. Beneficiaries receive \$62.7 a month.	Alimentary Pension in Federal Districts Programme. Started in 2003, managed, funded and operated by the local government (federal districts).	Considers the vulnerability of the elderly, but design does not consider gender inequality issues.	Linked to a local program: Social Support to Adults Mayor, which provides health services to senior citizens.	Aimed to guarantee a dignified life for senior citizens by improving their health, reducing inequality when facing illness and generating a culture that eliminates bias towards these citizens based on respect, recognition and social solidarity.	Citizens over 70 years of age who are residents of federal districts.	443,500 people (97% of the target population in federal district area). 62% of the beneficiaries are women.	Not been evaluated. Only a survey was conducted among beneficiaries. The survey revealed that for 23% of the beneficiaries the only income is the cash transfer received by the programme.
Wage subsidy. The amount is determined by the	Primer Empleo. Started 1 March 2007. It is a federal programme	Gender inequality is not considered in the design.	Links to health services by expanding the	Intends to support entrepreneurs or firms which	Firms which hire new permanent workers and	3,389 new registered firms by July 2007.	By 2 August 2007; the programme generated 6,700

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
base wage for new workers. New registered workers with a base wage below 10 minimum wages (\$41.83) receive a subsidy of 100%; amount decreases progressively until 10% of subsidy for workers with base wages above 20 minimum wages (\$83.66).	managed and funded by IMSS.		social security coverage provided by IMSS.	promote the generation of new, formal and permanent jobs, through a subsidy that covers a part of IMSS's mandatory fees for hiring new workers for a period of 12 months.	register them in IMSS. Also includes all new firms or companies that request registration at IMSS.		jobs.
School feeding. Breakfast service delivered to pre-school and school-age children according to nutritional and eligibility guidelines defined by programme operators at state level. Two kinds of breakfast are delivered. Cool breakfast includes 250ml of milk, 30g of pastries and fruit. Hot breakfast is cooked in school kitchens and includes 250ml of milk, stew, bread or <i>tortilla</i> and fruits.	Desayunos Escolares. Coordinated DIF but operated at state level. DIF provides general rules that each state uses to generate its own regulations for the programme. Funding comes from the budget the federal government assigns to states and municipalities. The first school feeding programme in Mexico was <i>Gota de Leche</i> , implemented in 1929, which evolved to <i>Desayunos Escolares</i> in 1996.	DIF provides no gender-specific considerations beyond those states could consider appropriate. However, DIF does recommend to state operators thinking of gender-based vulnerabilities for eligibility purposes.	According to DIF, children found to suffer severe malnourishment must be taken to the Public Health Centre to receive specialised attention. Programme also promotes parental participation through community committees and school kitchens.	Reducing malnutrition among undernourished children, improving their performance at school and diminishing absenteeism.	School-age children at risk, with any malnutrition level, enrolled in public elementary schools and pre-schools, and living in indigenous, rural or marginalised urban areas. States and municipalities are entitled to target beneficiaries according to these general instructions. The DIF method is to identify vulnerable municipalities first (indigenous population over 30%, high marginalisation, natural disaster areas, high Social Vulnerability Index); then, schools with high	In 2007, 6,158,446 million children benefited and 2,331,067,188 breakfasts were delivered. Around 27% of breakfasts were allocated in highly marginalised communities and 20% were delivered in areas with low marginalisation levels (data are incomplete for half of the states).	Owing to the decentralised implementation of the programme, there is no database available with comparable information from states. It has not been possible to estimate the national impact of the programme given these limitations. Impact evaluations have been conducted only in the state of Sonora. It was found that the programme had no effect on obesity and cardiovascular risk during the 2002/03 school cycle. Another evaluation in Sonora showed that children who

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
					dropout and repetition; and finally, poor, malnourished underachievers, among other general criteria. Social Vulnerability Index measures five vulnerability sources: family, age, education level, health, nutrition and gender.		received breakfasts improved their time of response to visual memory, verbal language and motor skills tests.
Disability allowance. Delivered to all private sector employees and cooperative members entering into the formal labour force who receive social security from IMSS. There are special systems for petroleum workers, public sector employees, and military personnel, but this is the main disability allowance programme in the country. The monthly benefit is equal to 35% of the insured's average adjusted earnings in the last 500 weeks of	Permanent Disability Benefits and Temporary Disability Benefit. Started in 1943 with 1973, 1997, 2001, 2004, 2005 and 2006 amendments. Managed by a general assembly, technical council, oversight commission, and director general of IMSS administers the programme. Coordinated and delivered by IMSS. Funded by beneficiaries, government and employers in the following way. Insured person provides every month 0.625% of covered earnings for disability and survivor benefits and an additional amount for administrative fees. The minimum earnings for contribution purposes are equal to the minimum monthly wage	Part of the mandatory individual account and social insurance system for formal private sector workers. Beginning 1 July 1997, all workers must join the mandatory individual account system, and the social insurance system is being phased out. There are no contributors to the social insurance system. At retirement, employees covered by the social insurance system before 1997 can choose to receive benefits from either the social insurance	Links with other social security benefits such as sickness and maternity, work injury, unemployment, family allowances, old-age allowances and survivors' allowances. Does not have any other direct link with gender equity programmes.	Provide social protection to cover contingent eventualities derived from illness and non-professional-related accidents among workers covered by this system. There are no gender objectives in the programme.	The insured should have at least 150 weeks of contributions with an assessed loss of at least 75% in normal earning capacity; at least 250 weeks of contributions with an assessed loss of between 50% and 75% of normal earning capacity. Guaranteed minimum pension: the insured is eligible for a disability pension and the pension (based on the value of the accumulated capital plus accrued interest) is less than the minimum pension. IMSS assesses the loss of normal	Formal private sector workers who are registered in and contributing to IMSS. At the beginning of 2009, there were 14,062,552 active workers contributing to IMSS.	There are no impact evaluations. Gender issues have not been explored in the evaluations conducted to the programme.

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
contributions. Dependent's supplement: 15% of the insured's pension is paid for a wife or partner and 10% is paid for each child younger than age 16 (age 25 if a student, no limit if disabled).	in Mexico City (minimum daily wage in Mexico City is about \$4). The maximum earnings for contribution purposes are equal to 25 times the minimum monthly wage in Mexico City. Employer: average 1.75% of covered payroll for disability and survivor benefits. Government: 0.125% of covered monthly earnings for disability and survivor benefits, plus flat-rate amount.	system or the mandatory individual account system. Gender inequality is not considered in the design.			earning capacity (physical or mental disability). There are no gender variables taken into account for the main programme eligibility.		
Targeted nutrition: Subsidy of fortified corn flour for people living in marginalised areas of the country. The cost to produce the flour is \$0.35 per kg and its public price is a fraction above that. Because of the small profit margin, it is believed that the government is subsidising a large part of the total cost of production and distribution of flour to provide an accessible price to marginalised rural and urban families.	Mi Masa; Created in October 2007; funded by the federal government, coordinated by SEDESOL and implemented by <i>Diconsa</i> (state corporation that runs grocery stores in rural and urban marginalised areas around the country) in its network of approximately 22,000 stores.	Designed to enhance the nutrition of marginalised communities utilising a Mexican food staple: tortillas. By fortifying this product with minerals and vitamins, consumers obtain nutrients that would otherwise be absent from their diet. In terms of gender, it is important to note that 1.9mg (per kg) of folic acid has been added to the corn flour in an effort to complement the diet of the female population.	Linked to programmes with a similar objective: providing marginalised rural and urban areas of the country with nutritious and affordable food.	To provide a relatively inexpensive source of nutrients for marginalised areas of the country through a Mexican food staple: tortillas. No gender-specific objectives are mentioned.	Stores managed by <i>Diconsa</i> usually in rural and urban marginalised areas. Given that these places do not have access to a market or an establishment that carries a wide variety of food products, stores fulfil community demand for a place to purchase quality and affordable food products. These are within a few km of communities with up to 2,500 people; all have the maize flour at their disposal.	Flour is distributed in approximately 22,400 stores which serve about 6 million households. From January to October 2008, approximately 33.2 tons of corn flour were distributed around the country.	No results of this programme have been published.

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
Targeted nutrition: Grant given by the federal government equivalent to 50% of the cost incurred by municipal governments to design and manage the programme (maximum of \$36,256 per municipality).	Health Communities Programme. Started in 2002. Funded by the federal government and implemented by all levels of the government: the Federal Ministry of Health and state and local authorities.	Technical assistance and training to local officials to promote healthy habits, services and projects where these are limited. Designed to enhance knowledge of health-related issues in marginalised areas. In municipalities where nutrition is a problem, promotes projects on nutrition and obesity. Training to officials and the general population to increase their understanding on gender and deter behaviour seen to promote gender bias.	Linked with all other health-related programmes that target marginalised communities. Provides local officials with the skills necessary to instruct the local population about issues relating to nutrition and general health, and information on federal and state initiatives that deal with these issues.	Providing municipalities with a population of 500 to 2,500 a better quality of life by making access to services and information related to health easier. No gender-specific objectives are clearly established.	Targets municipalities with a population between 500 and 2,500. Priority given to municipalities with a high degree of marginalisation, as determined by CONAPO, with a high proportion of indigenous population, with low levels of human development and with a lag in health-related issues.	During 2006 and 2007, the programme served 529 municipalities, which represents 21.64% of the nation's municipalities.	Evidence of the impact of the programme is limited. Case studies on the programme have shown that health habits related to nutrition and other diseases are being acquired by the communities in which the programme participates, therefore the population benefits from an increase in general health. However, because external evaluations are unavailable, no further results/ outcomes can be mentioned.
Social insurance							
Health insurance. Medical services are normally provided directly through health facilities of IMSS; costs are reimbursed by IMSS when it cannot provide them directly. Benefits include a	IMSS. Managed by a general assembly, technical council, oversight commission, and director general, IMSS Institute administers the programme through regional and local boards. Started in 1943 with 1995 (social insurance), 1997, 2001, 2004, 2005 and 2006	Part of the mandatory individual account and social insurance system for formal private sector workers. Beginning 1 July 1997, all workers must join the mandatory individual account system, and the	Has links with other social security benefits such as sickness and maternity, Work Injury, day care centres, loans for housing, unemployment, family allowances, old-age allowances and survivors' allowances. The	Providing social protection promoting effective access to health services for workers including general, maternity, dental, and specialist care; surgery; hospitalisation or care in a convalescent	Formal private sector workers, members of cooperatives, pensioners and dependents of insured persons.	Formal private sector workers who are registered in and contributing to IMSS, pensioners and their families. From January to June 2009, there were 46,060,677 beneficiaries,	There are no impact evaluations.

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
full range of procedures: general, maternity, dental and specialist care; surgery; hospitalisation or care in a convalescent home; 896 medicines; laboratory services; rehabilitation and preventative; and appliances. Benefits are paid for 52 weeks; may be extended in some cases to 104 weeks.	amendments. Funded by beneficiaries, government and employees: Insured person: 1.125% of covered earnings for old-age benefits, plus an average 0.625% of covered earnings for disability and survivor benefits and an additional amount for administrative fees. The minimum earnings for contribution purposes are equal to the minimum monthly wage in Mexico City (minimum daily wage in Mexico City is \$). The maximum earnings for contribution purposes are equal to 25 times the minimum monthly wage in Mexico City. Self-employed person: 6.275% of declared earnings for old-age benefits; 2.375% of declared earnings for disability and survivor benefits and an additional amount for administrative fees.	social insurance system is being phased out. There are no contributors to the social insurance system. At retirement, employees covered by the social insurance system before 1997 can choose to receive benefits from either the social insurance system or the mandatory individual account system. Gender inequality is not considered in the design.	programme does not have any other direct link with gender equity programmes.	home; medicines; laboratory services; rehabilitation and preventative programmes; and appliances.		44% of the population. Special systems for petroleum workers, public sector employees and military personnel worked similarly. Data disaggregated by gender are not available.	
Health insurance. The fee is progressive in relation to the income level of a family. It complements the federal subsidy that covers the cost of insurance.	Seguro Popular. Started in 2002. It is managed and funded by the federal and local government. Within the implementation, there is a division of labour: the federal government is in charge of the design and evaluation and provides	Provision of health care coverage, through a voluntary public insurance, for low-income individuals with no job, who are self-employed or who are without any social	Not linked to other programmes or services.	Providing financial protection through health insurance to citizens whose labour status does not grant access to any health plan or insurance. The objectives aim to reduce out-of-	Families with the lowest income (first and second deciles) and which have not been part of social security such as: IMSS, Pemex or ISSSTE. Affiliation is voluntary.	9.1 million families have joined <i>Seguro Popular</i> , 93% from the first and second income decile.	Impact evaluation by Harvard University. The results were: i) the programme reduced 2% of households' catastrophic health expenditure; ii) affiliation is higher in communities with

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
For families in the first and second income decile it is free and those in the last decile pay approximately \$870 per year. The insurance covers an array of 256 interventions.	a share of the funds to participating states for the implementation of <i>Seguro Popular</i> . The local government provides the resources to the public health system and is in charge of the registry of beneficiaries.	security. The design of the programme does not consider gender inequality issues.		pocket expenses by vulnerable families, strengthen the public health system and create more equitable health spending.			lower development, with a female head of the household, and members of the programme <i>Oportunidades</i> .
Health insurance. Children receive all types of medical assistance.	<i>Seguro para una Nueva Generación.</i> Started in 2007, managed by the Mexican federal government.	Designed for children under five, as this age group has higher incidence of infectious diseases that may affect cognitive development that may cause a permanent handicap in school and labour. Design does not consider gender inequality issues.	Links family members of beneficiaries to join the <i>Seguro Popular</i> programme.	Effective access to health services for children under five, born from December 2006 and who are not affiliated to social security. Without payment, they can receive health services that include: prevention, diagnosis, treatment and rehabilitation.	Children born after 1 December 2006 who are not affiliated to any other social security or welfare in health programme.	830,000 children are beneficiaries.	The programme has been operating for two years. There are no impact results yet.
Other mechanisms. Benefits include funding for productive projects up to \$7,500. Beneficiaries are encouraged to organise and start 'social enterprises.' Subsidies vary according to the size and characteristics of activity.	FONAES. Implemented and funded by the Federal Ministry of Economy and started in 2003.	Provides start-up capital. People are encouraged to affiliate or set up a formal savings club. There are benefits targeted to projects run mostly by women. Provides other subsidies to: i) help beneficiaries develop a business plan; ii) strengthen business operations; iii)	The main linkage is with the financial sector, especially with formal institutions devoted to micro savings and micro lending.	Contributing to the generation of entrepreneurial activities among the low-income population.	Targeted to poor families with entrepreneurial activity. Women's projects are encouraged and allocated with earmarked funding.	In 2008, benefited more than 60,000 people. Data disaggregated by gender are not available	Lacks an impact evaluation, therefore is not possible to establish causal effects. However, process evaluations suggest that the programme is well targeted. It also complies with its gender-oriented objectives.

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
		fund groups that spur entrepreneurial activities; and iv) start and operate 'social banking' institutions.					
Social equity and socially transformative measures (addressing issues of social equity and exclusion)							
Regulatory frameworks to protect vulnerable groups I. This regulatory framework provides guidelines for government protection to vulnerable groups such as women, children, old people (60 years old and higher), indigenous people and disabled people. For 2009, the total budget for all programmes related to this regulatory framework is approximately \$1.3 billion.	Federal Law to Prevent and Eliminate Discrimination , 2003. This law is implemented, funded and delivered by all ministries in the Mexican federal government. There is an autonomous regulatory body which coordinates the policies, makes evaluations and recommendations and verifies the fulfilment of the law in all public agencies. The regulatory body is called the National Council for the Prevention of Discrimination (CONAPRED).	The regulatory body provides general guidelines for the protection of vulnerable groups. All public institutions and agencies should fulfil this regulatory framework. In terms of gender protection, this law prohibits all activity which reduces any of the legal rights to women. The law also promotes opportunities for equity among women and men.	Links to all social programmes and government activities. Since all public institutions should fulfil this regulatory framework, it is related with many social programmes and regulations. In addition, in gender terms a natural link is the Law of INMUJERES.	Preventing and eliminating discrimination in terms of the first article of the Constitution, which prohibits all forms of discrimination based on ethnic or national origin, gender, age, disabilities, social condition, health conditions, religion, public opinions, preferences, civil state or any other condition which threatens rights and liberties. In addition, promotes equity of opportunities. In gender terms, prohibits all activities which reduce any of the legal rights of women. Also promotes opportunities for equity between men and women.	Targets vulnerable groups such as women, children, old people (60 years old and higher), indigenous people and disabled people. However, since the law is based on the first article of the Mexican Constitution, all discriminated people, in any condition, are protected by this framework.	Should cover all people. Disaggregated data by targeted groups are not available. Disaggregated data by gender are not available.	Results or outcomes derived from the implementation of this regulatory framework are not available.

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
Regulatory frameworks to protect vulnerable groups II (women). This regulatory framework provides the guidelines for the creation of INMURES. For 2009, the total budget for promoting gender equity is approximately \$660.4 million).	Law of INMUJERES , 2001. Implemented, funded and delivered by all ministries in the federal government. An autonomous regulatory body coordinates the policies, makes evaluations and recommendations and verifies the fulfilment of the law: INMUJERES.	The regulatory body provides general guidelines for the creation of INMUJERES. Besides, all public institutions and agencies should fulfil with this regulatory framework in terms of gender protection. This law prohibits all activity which reduces any of the legal rights of women. The law also promotes opportunities of equity for women.	Links to all social programmes and government activities. Since all public institutions should fulfil this regulatory framework, it is related with many social programmes and regulations	Create INMUJERES in order to promote gender equity and equity in the rights and opportunities for women and men.	This regulatory framework targets all women in Mexico, Mexicans and foreigners, and all Mexican women abroad. The law prohibits any discrimination among women based on ethnic or national origin, age, disabilities, social condition, health conditions, religion, public opinions, the preferences, civil state or any other condition which threatens rights and liberties.	Covers all women who are in Mexico, Mexicans and foreigners, and all Mexican women abroad. Data disaggregated by targeted groups are not available.	Results or outcomes derived from the implementation of this regulatory framework are not available.
Cash transfer/scholarship. Partial scholarships are given as cash transfers depending on grade level in higher education. Ranges from \$57.25 to \$76.33 monthly. Amounts are subject to federal and state government budgets.	National Programme of Scholarships and Financing for Higher Education (Pronabes). Started in 2001, managed by the federal government through SEP with coordination of state governments and high education institutes. Scholarships are funded by the federal and state governments.	Designed for potential higher education students with a low socioeconomic profile. Gender inequality is considered by the Selection Committee when it chooses the beneficiaries.	PRONABES has linkages with <i>Oportunidades</i> . When the student receives <i>Oportunidades</i> benefits, finishes high school and enters a higher education institute, can receive a PRONABES scholarship to continue with studies.	Allow students with a desire to overcome an adverse economic situation the opportunity to continue their higher education.	Designed for potential higher education students with a low socioeconomic profile come from indigenous, rural or marginalised urban communities. Targeting is by self-selection. Potential beneficiaries present to state technical committees their application forms.	In 2008, coverage was 267,385 students, 57.8% women.	PRONABES has been promoted in states with a large indigenous population. Access and permanence of indigenous students in public institutions of higher education have increased. This was the case in Chiapas, Guerrero and Oaxaca in 2003-2004.
Microfinance services. For poor rural women, up to \$114.5 in the first lending cycle. Up to \$190 in the	FOMMUR. Started in 1999, funded by the federal government, regulated by the Federal Ministry of Economy and delivered by private	Designed to enhance the access of poor rural women to microcredit services, in order	Design intends to be complemented by other programmes at federal, state and municipal level in	Promoting small business creation and development among poor rural women by helping microcredit	Microcredit providers are entrusted to serve poor rural women older than 18 and mothers or	107,376 women benefited from the programme in 2008.	In 2008, 69% of women expected to benefit from the programme had access to microcredit

Contributions of the *Estancias Infantiles para Apoyar a Madres Trabajadoras* Programme

Type of social protection	Programme information	Programme design	Programme linkages	Programme objectives	Targeting eligibility	Coverage	Result /outcomes
second lending cycle. Up to \$305.5 in the third lending cycle. Up to \$6,000 in the fourth lending cycle. Credits and subsidies are given to participant lending institutions. Amounts are to be decided by programme operators in every case.	lending institutions.	to help them participate in productive activities and acquire saving habits and business skills to improve their living conditions. Women older than 18 are considered for participation, as well as any mother or pregnant woman older than 15.	case of matching objectives, especially by <i>Pronafim</i> , but means or actions are not specified. In order to receive a credit, women must organise themselves in groups that engage in saving and/or lending practices with shared responsibilities, thus enhancing social cohesion.	providers serve the target population. Providers receive credits and subsidies, to give lines of credit to target populations and for training and branch opening purposes. The ultimate objectives are to insert targeted women in the productive system, and improve their living conditions while creating a stronger, broader and more sustainable network of credit providers for the rural poor.	pregnant women older than 15 organised in groups of five to 40 individuals, living in highly marginalised communities. Lending institutions must have been active for at least one year, serve in an area with at least 200 women and be oriented to rural economic development to participate in the programme.		services. 91.84% of credit was allocated in indigenous municipalities. A positive effect was found on participants' household welfare in 2006: the share of food expenditure decreased when a second credit was received. On the other hand, as the number of credits increases, the share of education and health expenditures rises. Accumulated experience sees a slightly positive effect on the use of formal financial mechanisms, such as bank accounts or credit cards.

Annex 3: Research instruments

Life history questions

Key information

Aims:

- To explore in-depth individuals' gendered experiences of risk and vulnerability, and the individual, household, community and policy-level factors which shape available coping/resilience strategies
- To gain an understanding of the relative importance of the focus social protection programme intervention in diverse individuals' lives

Scope:

- Eight life histories among participants per sub-national district for the following life stages:
 - Adolescent (m and f)
 - Married (m and f)
 - Single-headed hh (m and f)
 - Aged (m and f)

Data collection and other issues:

- Gift
- Recorded, transcribed and English verbatim translation
- Field notes on interview dynamics
- Interview to last between 60 and 90 minutes

Useful resources:

- 'Report on CPRC workshop: Panel Surveys and Life History Methods'. See especially page 8 (Figure 2, Life History Diagram, Bangladesh)

Life history interview questions for adolescents (male and female)

Introductions

- Basic background information (name, age, place of birth, living arrangements etc)
- Explain the objectives of this study and the format of the interview

General (optional depending on judgment of lead qualitative researcher in country team)

- What are some of the key challenges that girls/boys [choose the same sex as your interviewee] of your age in this village face? E.g. at the following levels:
 - Individual level (e.g. lack of schooling, health-related problems, hunger, violence, teenage pregnancy)
 - Household level (e.g. lack of decision making in household; unequal allocation of time doing tasks in and out of the household between siblings; unequal distribution of food)
 - Community (lack of participation in community decision making, lack of provision of basic services; lack of opportunities for young people; significant generational differences between old and young)
- Have they always faced these challenges?
- How do people tend to cope with these challenges? E.g.
 - Borrow money (from relatives, friends, micro-finance institutions)
 - Work in paid employment
 - Make different family arrangements (e.g. living with different family members)

Individual recent past

- Can you tell us about your life over the last two or three years?
- Has anything gone particularly well during this period? What have been the positive changes? Who and what was responsible?
- What particular challenges have you faced over the last two/three years?
- Can you explain why you think you face these challenges?
- Have you / your family tried to overcome these challenges? What strategies have you used? How well have these strategies worked?
- Have other families in the village also used these strategies to overcome similar challenges?
- How do you think your options / strategies have been similar or different from girls/boys (opposite sex to interviewee) of the same age?
- Have you been involved in any government or non-government programmes/activities that have helped you overcome these challenges?
- Has the LEAP provided specific support to overcoming these challenges? If no – why not? If yes - in what way?

Longer past

- Thinking back to when you were younger, can you map out **key events** in your life up until now (positive and negative) that have influenced the type of choices you have made or the alternatives you've had? Why have these been important?
 - At individual level (e.g. schooling, health)
 - Household level (e.g. livelihood opportunities; available household resources; decisions in the household to spend on schooling, health, income generating; changes in the family (birth, death, marriage, divorce etc));
 - Community level (e.g. discrimination/exclusion from community activities or resources; exclusion from participating in community decision making, violence)
- How has the way you and/or your family lived life until now influenced the way you deal with the challenges you identified before?
- Do you ever think that if you had made a different choice before, your life would be different now? What would you have done differently?

Future plans

- Given your present circumstances what are you planning to do in the short term? What are your longer term plans?
- How do you think your options are similar or different from someone from the opposite sex of the same age?
- To what extent can the LEAP help you achieve your short term and long term plans?
- How would you change the social protection programme to better meet your needs?
- Is your view the same as others in the household or do different members have different opinions?

Life history questions for married/single/aged (male and female)

Introductions

- Basic background information (name, age, place of birth, living arrangements etc).
- Explain the objectives of this study and the format of the interview

General

- What are the some of key challenges that women / men [choose the same sex as your interviewee] your age in this village face?
 - individual level (e.g. lack of schooling, health-related problems, food insecurity, violence, lack of ownership of assets (e.g. land, livestock, housing)

- household level (e.g. lack of decision making in the household over household expenditure e.g. on productive activities, on health and education, on food; unequal allocation of time e.g. in domestic and care responsibilities and income generating activities; unequal distribution of food in the household)
- Community (lack of participation in community decision making, lack of provision of basic services)
- Have they always faced these challenges?
- How do people tend to cope with these challenges?

Individual recent past

- Can you tell us about your life over the last two or three years?
- Has anything gone particularly well during this period? What have been the positive changes? Who and what was responsible?
- What particular challenges have you faced over the last five years?
- Can you explain why you think you face these challenges?
- Have you tried to overcome these challenges? What strategies have you used? How well have these strategies worked?
- Have other families in the village also used these strategies to overcome similar challenges?
- How do you think your options / strategies have been similar or different from women / men [choose opposite sex to interviewee] of the same age?
- Have you participated in any government or non-government programmes/activities that have helped you overcome these challenges?
- Has the LEAP provided specific support to overcoming these challenges? If no – why not? If yes - in what way?
- Over these last five years has anything gone particularly well? What have been the positive changes? Who and what was responsible?

Past

- Thinking back to when you were younger, can you map out key events in your life up until now (positive and negative) that have influenced the type of choices you have made or the alternatives you've had?
 - At individual level (e.g. schooling, health)
 - Household level (e.g. livelihood opportunities; available household resources; decisions in the household to spend on schooling, health, income generating; changes in the family (birth, death, marriage, divorce etc));
 - Community level (e.g. discrimination/exclusion from community activities or resources; exclusion from participating in community decision making)
- How has the way you have lived your life until now influenced the way you deal with the challenges you identified before?
- Do you ever think that if you had made a different choice before, your life would be different now? What would you have done differently?

Future plans

- Given your present circumstances what are you planning to do in the short term? What are your longer term plans?
- How do you think your options are similar or different from someone from the opposite sex at the same life stage?
- To what extent can the social protection programme help you achieve your short term and long term plans?
- How would you change the social protection programme to better meet your needs?
- Is your view the same as others in the household or do different members have different opinions?

Focus group discussions

Key information

Aims:

- To understand the strengths and weaknesses of the implementation of the focus social protection intervention
- To understand the strengths and weaknesses of the focus social protection intervention in terms of shaping community experiences of inclusion/ exclusion and/or discrimination

Scope:

- 4 FGDs (2 men, 2 women) per sub-national unit with programme participants

Data collection required:

- Maximum 75 minutes
- Provision of snacks
- One person leading
- One person recording identity of participants and the sequence in which they speak
- One translator for ODI team
- Detailed notes from discussion around the four questions including areas of debate among participants and dominant opinion among participants for each question
- Observation of group dynamics

Useful resources:

- Slater, R. and Mphale, M. (2008) Cash transfers, gender and generational relations: evidence from a pilot project in Lesotho. See especially Annex 2.

Focus group discussion: Key questions/themes and suggestions for prompts

- 1. What have been the direct impacts of the social protection programme on the household?**
 - Improving economic security
 - Improving food consumption (quality and quantity)
 - Helping to provide better protection and care for household members
 - Improving household human capital
 - Providing adequate protection from the impacts of shocks (e.g. community and idiosyncratic shocks)
- 2. What have been the indirect impacts of the social protection programme on the household?**
 - Has participation in the programme influenced power relations between men and women? Between generations? How and why?
 - Has participation in the programme influenced access to social capital (formal and informal)?
 - What impact does the programme have on child well-being?
 - Impact on access to credit services
 - Reduce impact of seasonality
- 3. What have been the direct impacts of the social protection programme on the community?**
 - Increased access to/utilisation/accumulation of community assets – for whom?
 - Increased utilisation of social services

4. What have been the indirect impacts of the programme on the community?

- Better quality basic social service
- Increased civil society agency to demand entitlements – representing which types of groups?
- Increased government responsiveness to citizen demands
- Reduced exclusion of marginalised social groups
- Negative impact on community E.g. exacerbating existing community tensions
- Tensions between women in different social groups

N.B. For analysis, refer back to conceptual framework levels: individual, household and community

Key informant interviews

Key information

Aims:

- To enrich our overview of social protection design and evaluation decision-making processes
- To explore political economy dimensions of the integration of gender into social protection policies and programmes
- To better understand implementation dynamics (of the above) at the sub-national level

Scope:

- National level GOs, NGOs, int'l agencies and donors
- Sub-national implementing agencies (GOs and NGOs)

Data collection required:

- Detailed notes about content of interviews in terms of our key questions above
- For issues relating to framing of social protection debates we require *verbatim* notes
- Recorded tape (preferable for back up purposes)
- Brief field notes describing interview dynamic and other relevant information
- Full list of key informants details – position, organisation name, where they fit in alignment influence matrix

Useful resources:

- DFID (2009) Political Economy Analysis How To Note

Key informant interviews at national level

1. Stakeholder analysis

- a. Map key social protection stakeholders according to the stakeholder analysis figure below (aligned and powerful). Include governmental, international and national agencies.
- b. Map women's agencies machineries – e.g. from national government level to local level (e.g. gender focal points)

2. Key informant interviews – who to interview

- a. Refer to stakeholder analysis figure and prioritise meetings with “powerful” stakeholders (aligned and non-aligned)
- b. Identify who to talk to in an institution/organisation by starting with existing contacts and using the snowballing technique (asking them to refer you to other individuals in a given institution/organisation)

3. Semi-structured interview questions

- a. If you are unsure of whether the institution/organisation/individual is aligned or non-aligned, ask the non-aligned questions first to get an idea (then you can move to the aligned questions if appropriate)
- b. See matrix of questions below to give an idea of the types of questions we need to ask – please add in specific country-focused/specific social protection programme questions if/when appropriate

Key informant questions at national level

N.B. In order to avoid standard answers on gender, it is important that interviewers refer back to the background work to identify key gendered risks and vulnerabilities and social risks which can be used to prompt the interviewee to think in more depth and more systematically about gender in social protection policy and design.

NOT ALIGNED Objectives: 1. To understand to what extent gender has been integrated in to the design of social protection policy and programme	Country/Programme-specific additions
<ul style="list-style-type: none"> What are the main goals of your social protection programme / policy? 	<ul style="list-style-type: none">
<ul style="list-style-type: none"> What factors have been most influential in the development of social protection? (e.g. government priorities, attainment of MDGs, civil society pressure, donor funding). What are some of the challenges which constrain the scaling up of social protection? 	<ul style="list-style-type: none">
<ul style="list-style-type: none"> To what extent do you think that the types of vulnerabilities and risks your programme is trying to address (e.g. see goals above) have been considered by gender? Can you give some examples? (prompts can be used to refer interviewee to country specific risks and vulnerabilities) 	<ul style="list-style-type: none">
<ul style="list-style-type: none"> To what extent are social risks considered in social protection programmes in your context (can prompt with country specific examples of social risks and vulnerabilities)? What explains your view? 	<ul style="list-style-type: none">
<ul style="list-style-type: none"> What kind of evidence shapes the design and evaluation of social protection policy and programmes? (e.g. poverty data and analysis? disaggregated by gender? Programme M&E?) 	<ul style="list-style-type: none">
<ul style="list-style-type: none"> With which actors (NGO and GO) do you work most closely on this agenda? 	<ul style="list-style-type: none">
ALIGNED Objectives: 1. To identify the pathways (recent and historical) in which gender has been successfully integrated into the design of social protection policy and programming at a national level; 2. To identify the key actors driving the social protection and gender agenda forward; 3. To identify the challenges which have been overcome (or still need to be overcome) to successfully integrate gender into the design and implementation of social protection policy and programme. E.g. political / ideological resistance from other Ministries/departments/organisations? Administrative challenges – e.g. resources, staff capacity, co-ordination?	Country/Programme-specific additions

KEY QUESTIONS	•
<ul style="list-style-type: none"> In what ways is gender integrated into the design of social protection policy and programming in your context? Can you provide some specific examples? (Prompts can be used to refer interviewee to country-specific gendered risks and vulnerabilities) 	•
<ul style="list-style-type: none"> What strategies have been used so far to integrate a gender perspective into social protection design? 	•
<ul style="list-style-type: none"> What are the challenges/ tensions involved in enhancing the integration of gender into social protection policies and programmes? 	•
<ul style="list-style-type: none"> What are the potential opportunities for strengthening gender sensitivity of social protection design and implementation? 	•
<ul style="list-style-type: none"> What factors (political economy, cultural drivers and historical legacies) have shaped policy choices about social protection? (in general and at specific historical junctures (e.g. 2008 food price crisis?). To what extent have these factors in turn shaped the relative strength of a gender perspective in social protection policy decision-making? 	•
<ul style="list-style-type: none"> What was the role of research and/or programme evidence within this decision-making process? 	•
<ul style="list-style-type: none"> What are the constellation of actors (GOs and NGOs) which have influenced the decision-making process around social protection and gender? 	•
INFLUENCE (ask to all interviewees) Objectives: 1. Assess the relative influence of key actors in shaping the social protection agenda	Country/Programme-specific additions
<ul style="list-style-type: none"> What is your role in informing / influencing the design / resource allocation to social protection policy and programming? How would you rate your influence in the social protection decision-making arena in comparison to other actors? What accounts for this? 	•
<ul style="list-style-type: none"> What is the role of national / international civil society in shaping the social protection agenda in your country? What is the role of the donor community in shaping the social protection agenda? 	•
<ul style="list-style-type: none"> What role has research or programme evidence played in this process? 	•
<ul style="list-style-type: none"> What role has the framing of specific social protection debates played in this process? E.g. do different actors have different objectives for social protection? (E.g. rights based approaches? social protection for non-productive poor (children and elderly?) or social protection to contribute to economic growth / food security etc). What are these? Have different discourses on social protection this created conflict or tensions? 	•

In addition, questions can be asked to plug specific knowledge gaps that were not addressed through the matrix or literature review:

- a) M&E systems
- b) Data collection systems especially with regards to gender indicators
- c) Learning from programme implementation

Key informant interviews at sub-national level: implementers, programme staff, local government

N.B. To avoid standard answers on gender, it is important that interviewers refer back to the background work to identify key gendered risks and vulnerabilities and social risks which can be used to prompt the interviewee to think in more depth about gender in social protection policy and design.

- A) Coverage (gendered and general)**
- B) Quality (gendered and general)**
- C) Underlying reasons for quality and coverage of implementation**

Implementing / coordinating agencies	Country/programme-specific additions
COVERAGE	
Are you satisfied with implementation of the programme to the target population so far? Why (or why not)?	
Can you tell us more concretely the results of coverage to date? (disaggregated by sex, social group etc.)?	
Are there any barriers which women face in particular to participating (partially or fully) in the programme (e.g. timing of participation in the programme conflicts with domestic and/or income generating activities; women are not allowed to move freely to participate in programme meetings). Do these challenges differ by age? How can the barriers be overcome?	
If you want more coverage of specific target groups (e.g. women and girls) what are the constraints and how would you overcome them? (Explore the socio-economic constraints, and at different levels (hh, intra-hh etc))	
Do you think there are social groups which have not been included that should be included and why? (e.g. outside the scope of the existing social protection programme?)	
QUALITY	
To what extent do the people in charge of operationalising the programme have knowledge on gender or are sensitised to gender issues?	
To what extent have women been consulted in the design and implementation of the programme?	
Are there any complaints mechanisms which beneficiaries and non-beneficiaries (excluded) can access?	
Does the programme's implementation consider gender vulnerabilities / constraints that might reduce its impact or reach? (e.g. women's time constraints, child care responsibilities etc). Please give examples.	
What measures have been put in place to promote a more equitable demand for the uptake of the programme e.g. communications / information?	
UNDERLYING REASONS FOR COVERAGE AND QUALITY	
What have been the roles of each level of government in the implementation of the programme? Which kinds of conflicts have arisen? e.g. resources, decision-making. How could these conflicts be resolved?	
To what extent are different agencies involved in delivering social protection? E.g. gender-focused organisations/government departments (e.g. women's affairs offices).	

To what extent are the gender focal points involved or briefed in programme implementation?	
How is staff capacity evaluated for implementation of the programme? What are the main limitations? (staff capacity number or quality)	
Are the resources available sufficient for effectively delivering the programme? Do the implications of resource constraints affect women and men differently? To what extent are the gender components outlined in policy/programme design documents budgeted and allocated? (e.g. child care facilities)	
Is there conflict between institutional objectives and programme objectives for the main implementer of the programme?	
To what extent has civil society been involved in the social protection programme?	
To what extent is there demand at the community level for the programme? Who has been taking the lead role in this?	
To what extent has the implementation of the social protection programme had spill-over effects to the implementation of complementary services (e.g. basic services).	