International Modeling and Brazilian Public Policies for Poverty Reduction

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The relationship between public social policies for poverty reduction and the requirements of international organizations on the issue may explain the similarities between public policies in countries with significant economic and cultural differences. The formulation of these policies may be linked to factors of the domestic political and economic situation and also to the institutional encouragement and international cultural standard, as discussed in the literature on the Theories of Policy Diffusion and Policy Transfer. This article presents the results of ongoing research that investigates Brazilian social policies for poverty reduction under the Cardoso, Lula, and Rousseff administrations. It suggests that so-called positive modeling predominated as national policies were linked to international policies focusing on the low-income population and that the international political community considered Brazilian conditional cash transfer policies as a model. In the second Lula and Rousseff administrations, there was negative modeling (i.e., contrary to international recommendations) between policies of economic growth and increasing or maintaining the values of social public spending; international financial institutions prescribe economic austerity and a reduction of social public policy. At the same time, there was positive modeling due to the centrality that the administrations have assigned to policies focusing on the low-income population. This centrality may bring a risk to the universalist perspective.

La relación entre las políticas para la reducción de la pobreza y las prescripciones de las organizaciones internacionales podría explicar las similitudes de las políticas en los países que tienen diversidades económicas y culturales. La formulación de tales políticas podría estar vinculada a factores económicos y de política interna y también al incentivo cultural e institucional internacional, como se discute en la literatura sobre la difusión y la transferencia de las políticas. En este artículo se presentan los resultados de la investigación en curso sobre las políticas brasileñas para reducir la pobreza en los gobiernos Cardoso, Lula y Rousseff. Los resultados sugieren que durante estos gobiernos el llamado modelo positivo predominó debido a la congruencia entre las directrices nacionales e internacionales sobre el foco sobre la población de bajos ingresos y también debido al hecho de que las políticas sociales brasileñas fueron consideradas internacionalmente como un ejemplo. En el segundo gobierno Lula y en el gobierno Rousseff fue identificado un modelo negativo (es decir, en la dirección opuesta a las recomendaciones internacionales), entre la articulación de las políticas de crecimiento económico y el aumento o mantenimiento del gasto público social. Esto es contrario a las recomendaciones de las instituciones financieras internacionales que prescriben las medidas de austeridad y la disminución de la política social. No obstante, se mantuvo

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también un modelo positivo, debido al papel central que los gobiernos conceden a las políticas enfocadas a la población de bajos ingresos. Esta centralidad puede traer riesgos para la perspectiva universalista.

Key words: poverty, policy diffusion, policy transfer

Introduction

Because social public policies for the reduction of poverty must follow indications from international organizations such as the United Nations, the International Monetary Fund (IMF), and the World Bank, most countries appear to have similarities in their public policies even when they are economically and culturally diverse. Furthermore, government leaders from many different countries have access to the same cultural and institutional standards, and the same international financial institutions encourage them. This means that modifications to social policy are based not only on domestic political and economic factors but also on incentives from institutions and on international cultural patterns, as the theoretical perspective for public policy analysis called international modeling (Skocpol & Amenta, 1986) and the Theories of Policy Transfer and Policy Diffusion (Pessali, 2010; Weyland, 2004, 2005) discuss.

Recent studies on modeling and the adopting of public policies cite the recent actions of international entities such as the IMF and the World Bank, mainly through what became known as the Washington Consensus. According to these organizations, countries seeking economic growth and the reduction of social differences should review their macroeconomic policies and their institutions, following the standard model adopted by developed countries (Pessali, 2010, p. 3).

In Brazil, the Federal Constitution of 1988 calls for more emphasis on rights and social policies. The governments of Cardoso, Lula, and Rousseff formulated strong public policies for the reduction of poverty, such as Cardoso's Bolsa Escola and Lula and Rousseff's Bolsa Família.[1] These public policies differ from those promoted by the governments of Sarney, Collor, and Itamar, who subordinated the policies for the reduction of poverty to economic and political reforms. For the Cardoso, Lula, and Rousseff administrations, the reduction of poverty became a social policy of redistributional character that was articulated with economic policy, despite the differences between Cardoso and the other two leaders. Data from official institutions such as the Brazilian Institute of Applied Economic Research (IPEA) and from articles by Fagnani (2011) and Neri (2011) show the positive effect of these policies on the reduction of inequality and, most notably, on the reduction of poverty. Between 1960 and 2000, Brazil was one of the most unequal countries in the world and had a large low-income population. This situation has improved since 2000. Brazil's earlier economic problems were not due to the size of its economy but to other factors. There was a poor appropriation of wealth, and Brazil's economic elite, backed by the government, used most of the public resources and services. There was a weak policy for social redistribution and economic and fiscal policies with no tangible criteria of social justice, understood as a universal promoter of access to the cultural and material wealth of a society among the population.

The international community believed and generated widespread conceptions about the policies for poverty reduction in Brazil. Such incorporation of conceptions of poverty, coverage, and sources of financing occurs either through a vertical enforcement by international financial institutions, or through horizontal contagion among countries and government experts (Weyland, 2004, 2005).

The aim of this article is to present preliminary results on the research about social public policies for reducing poverty in the Cardoso, Lula, and Rousseff administrations[2] under the perspective of the Theories of Policy Transfer and Policy Diffusion dealing with international modeling. The research questions are

1. How did social public policies for poverty reduction in Brazil during the Cardoso, Lula, and Rousseff administrations absorb widespread cultural patterns and policy models transferred internationally and among regional blocks?
2. Based on the process in Brazil, how are such policies and the cultural patterns and institutional arrangements pertaining to them transferred?

The text is divided into two main parts. The first discusses the theoretical current in studies, and the second presents the discussion of the Brazilian social protection system.

Public Policies and International Modeling

Keynesianism and the set of public social policies used in the 19th and 20th centuries were responsible for building the social order that configures a default capitalist interventionist state in social protection. Studies by Rezende (2008) and Draibe (2003) demonstrate that modifications to this system from 1980 until early 2000 led to less economic decline and greater adaptation. Rezende (p. 36) confirms that, "states continue to show strong patterns of intervention in social policies." Even in the case of Brazil, "social spending represents a large portion of government spending and there is a significant expansion of social policies." Draibe notes rare cases where the modifications have led to exterior changes to the welfare state models to which Esping-Andersen (1991) referred as liberal, conservative, and social democratic, and which can be grouped into Bismarckian and Beveridgean. Hammoud (2008) agrees that modifications have occurred in each country according to historical institutional constraints to each model.

In the context of so-called economic crisis and of austerities proposed in recent years, these findings are in line with the institutionalist analyst model as discussed in Perissinotto (2004), March and Olsen (2008), and Souza (2006), and with incrementalism, which underlines the concept of path dependency, that is, the importance of the historical trajectory and institutional arrangements within the framework of public policy for delimitation of the possibilities in present and future change.

For the Brazilian case, the institutional standard is configured as conservative meritocratic. In this conservative model, there is a link between employment and access to benefits, and the premise is "that people should be able to provide their own needs based on their work. Social policy intervenes only partially, completing and correcting the positioning actions of the market" (Draibe, 1993b, p. 7).

The changes to the default model came about under pressure and followed two different principles. The Federal Constitution of 1988 offered universalist distribution principles of public services (Arretche, 2000; Draibe, 1993a). There were also liberal principles aimed at lowering the financial load and social state provision and at establishing criteria for selectivity prioritizing among groups in poverty or extreme poverty (Fagnani, 2005; Figueiredo & Limongi, 1995). The current system of public social policy includes anti-poverty programs from the 2000s.

Theories on Public Social Policy

Skocpol and Amenta (1986), and Arretche (1995) summarize the theories that explain the emergence and development of changes to public social policy. Four theories are predominant.

The first theory emphasizes the process of industrialization and explains the advent of a social policy system as dependent on the development of capitalism. The structural–functionalist model highlights the transition from farming to industrialism—born of economic growth and demographic changes—as the primary cause to explain the development of the welfare state. The political culture concerning the relationship between social needs and public modes determine how it expands and is modified in each society. Neo-Marxist theory affirms that social policy is a variable dependent on the transition from competitive capitalism to monopoly capitalism. Social policy should respond to the needs of accumulation, legitimization, and maintenance of social stability, or help build the working class and its forms of consumption.

The second theory is of political–institutional character and focuses on democratic institutions or the expansion of rights. The focus on democratic institutions takes into account that governments have an effect on the distribution of resources and results, and that public social welfare policies have redistribution effects. This approach (1) relates the institutions and formal procedures of democracy (electoral participation, especially competitive elections) to social policy growth; (2) highlights the effects of the party system and competition among political parties; (3) understands that demands and popular protests influence the creation of social policies; and (4) shares the neo-Marxist view that the issue of class is the fundamental axis of power and politics in industrialized capitalist democracies and this fact affects the creation of public policies, including social ones.

The third theory is of institutional and historical character centered on the state. The social organizational structure of the states and the political effects of other established policies shape public policy. One of the sub theories of this concept does not interpret states as mere administrative mechanisms instrumented by groups interested in formatting the policies; this sub current considers the state as actors and structures. The attention falls on the historical sequence of the construction of the institutional structures of the state, which affects the formulation of social policy and has an effect on the political parties, the formation of class, and political culture. Another sub theory examines the political consequences of the policies already put in place, noting that the causes that lead to public policies do not necessarily influence their subsequent development.

Public policies[3] are the products of past actions and decisions, and the institutions, once formed, acquire a development and virtually autonomous movement.

The final theory is one of transnational context. The way in which the economy, the geopolitical context, and the international culture developed contributed to shape national social policies during the 20th century. Within this theory there are three subgroups of thought, theorists who (1) link public social policy strategies to the world economy, (2) relate social policies to geopolitics and understand their creation as a resource of international competition, and (3) note that a pattern of social policies has spread in countries with different levels of development, particularly after 1920 and following structures used first in Europe and the Americas.

The research focuses on the third sub theory, called international modeling. Social policies come about because rulers and government personnel have access to a cultural standard and institutional features and to encouragement from intergovernmental organizations. Modifications to public social policy are then related not only to domestic political and economic factors but also to international standards and to encouragement from international institutions.

This sub theory is also related to Policy Diffusion and Policy Transfer theories. Policy Transfer is "a process in which knowledge about policies, administrative arrangements, and institutions in one time and/or place is used in the development of policies, administrative arrangements, and institutions in another time and/or place" (Dolowitz & Marsh, 1996, p. 344). Policy Diffusion is a particular way in which policies spread among people and regions, for example, how policy formulations are widespread among people and groups through interaction in meetings, conferences, and other networks. "States or other entities are more likely to adopt a given policy when their officials interact with officials in states who have already adopted a given policy" (Newmark, 2002, p. 7).

International modeling has not been sufficiently explored in studies on social policy. For instance, Hammoud (2008) does not offer a profound analysis of this idea when dealing with the domestic determinants of changes to the model of the welfare state in European nations, even when taking into account the pressure the European Union faces from national political actors when attempting to converge policies. Mauriel (2009, p. 60) does not concentrate on this theoretical perspective when discussing how social protection reforms in Brazil faced a favorable international scenario "for the growth and strengthening of market mechanisms." The same occurs in Ugá (2004) when treating the poverty category structure as part of a social, political, and cultural order. It is important to explore some strategies to establish relationships between conceptions of current international modeling, especially theories of transfer or policy diffusion, and the policy on poverty in Brazil.

The Brazilian System of Social Protection and International Diffusion

In the final decades of the 20th century, especially from 1980 to 1990, the neoliberal perspective guided reforms of social programs in countries with governments of different ideological orientations and with various backgrounds of social policy and welfare state. There is now a kind of "revival" of the neoliberal wave, or a new impetus, born of the crisis in the financial system that began in the 2000s and worsened after 2006 in the United States and much of Europe.

International organizations have spread values and guidelines for reformatting the public offering of social goods and services, substituting "post-war Keynesian policies with restrictive spending policies" (Souza, 2007, p. 65). The influence of the international system on national social policies is implemented "through diffusion and institutional learning processes" and also "through impulses, incentives or vetoes." Often the result is an "asymmetric articulation of the international agenda and national public policies" (Draibe, 2007, p. 36). In some countries, including Brazil, following these international stipulations has conditioned the implementation of public policies to comply with fiscal adjustment and the balance between revenues and the budget for spending, restricting in a way government intervention in the economy (Bresser-Pereira, 2004). The main justifications for austerity guidelines and a "smaller government" are excessive centralization and bureaucratization of the state, the state's supposed incompetence in social management or its inability to meet the new socioeconomic demands, and the financial–fiscal crisis. There is another possible interpretation of the imbalance between revenue and spending, a crisis or collapse of the welfare state and it is first and foremost the problem of the tolerable socialization degree of a certain number of goods and services. International organizations delegitimize the welfare state partly for cultural reasons, "the crisis of a development model and a crisis of a given system of social relations" (Draibe & Henrique, 1988, p. 67).

Studies have shown that, until early 2000, policies based on international models were able to give priority to the most impoverished social groups, reduce universality, change social security standards (Brooks, 2004), and reduce social spending, but in general, they failed to dismantle the previously existing public protective standard, the Welfare state model previously established in each country. According to Hammoud (2008, p. 30), data from the European Union showed that, in the first decade of the 21st century, although there were some changes, the major trends remained the same. "The Nordic countries are continuing with the broader, more universal Welfare state, the countries of the continent with a medium Welfare state, and England with the most modest and most linked to the market."

Institutional and historical conditions are still present in social policy systems to change the direction of social spending and undermine the principle of universality based on the condition of citizenship rather than poverty, even after three or four decades of neoliberalism,

Despite these vestiges, the recent economic and fiscal crisis gave international organizations the opportunity to go back to the concept of small government and to encourage changes to the public social protection system that would tend to undermine the Welfare state that had earlier defined extended rights and citizenship through social public policies (Lavalle, 2003). Policies are implemented that focus on target groups and their specific needs instead of on universal policies for all citizens. There is no "virtuous merge among universal programs and focused programs" (Draibe, 2002, p. 8) that could combine the advantage of universal guarantees and the allocation of additional resources and services for specific groups in an attempt to decrease social inequality. International financial organizations focus on target populations, which places a ceiling on social spending in underdeveloped countries and represents a "bargaining chip for the reform of European welfare state regimes—an austerity measure to tackle the fiscal crisis" of the 2000s (Fagnani, 2011, p. 12).

At the end of the 20th century, Brazil formatted and consolidated the current public social policy system based on the Federal Constitution of 1988 and regulatory laws. These legal norms established social policy for statist solidarity—meaning social rights with fundamental rights—public provision and universal public social policy, and cash transfer programs, among other things.

According to Fagnani (2011, p. 12), changes to public social policy in Brazil went through three stages. During the first, the country walked "against the world" and followed "the reverse route of neoliberalism." Social and political movements prompted the introduction of articles on rights and social policies into the new Constitution—with principles of universality and the state's public provision of social services. In Brazil, the 1988 Constitution "institutionalizes the agenda of universalization and access equality in the decade in which on the international scene, the strategies of dismantling of the Social Welfare state are strengthened" (Franzese & Abrucio, 2009, p. 12).

The second stage, from 1990 to 2005, was characterized by the prioritization of lower-income target groups and the regulation of Brazilian social policy. This process revealed the pressure to reduce the reach of constitutional guarantees through complementary law and to reallocate social spending, although there were some political movements against these changes to the Constitution.

Processing laws and amendments to the Constitution required "intensive negotiations within the government and with the opposition coalition" (Melo, 2005, p. 860). There were groups whose political values were compatible with articles of the Constitution, but there were others whose goals were not. Some saw in the Constitution the embodiment "of progressive hopes that inhabited the minds of leaders and political activists located to the left of the ideological spectrum during this period" (Perissinotto, 2010, p. 13), and others had affinity with traditional conservative social policies or were aligned with liberal tendencies for reforms. To block the changes, these groups postponed complementary legislation and restricted the interpretation of regulating laws and constitutional amendments.

According to Melo (2005), from 1992 to January 2004, 50 amendments to the Constitution were presented. Of these, 26 of them dealt with institutional issues, 22 with federalism, 22 with fiscal control, 11 with social policies, and 11 with the economy. Most of them overlap and cover more than one subject. Twenty-two of the Constitutional amendments cover social policies, but this number increases if we consider two things. "42 of the constitutional amendments approved refer directly to aspects of Brazilian federalism," and of the "total amendments pertaining to federalism, more than half (53%) relate to policies and social rights" (Melo, 2005, pp. 860–2).

Once the constitutional text covered specific policy issues, much of the reform and "initiatives on social policy and poverty reduction" were made possible through the Constitution (Melo, 2005, p. 867). Even when amendments and regulations were not aligned with the general tone of the 1988 Constitution, the overlaying constitutional regulation for social policy promoted a legal standard

Table 1. Brazilian System of Social Public Policy in the Governments of Cardoso, Lula, and Rousseff (1995–2012)

Years	Governments	Stages of public policy
1995–2002	Cardoso	2nd stage (low-income targeted group; social policy legislation)
2003–2010	Lula	2nd stage (low-income targeted group; social policy legislation 3rd stage (low-income targeted group; articulation of reducing poverty policy and economic policy)
2011–2012	Rousseff	3rd stage (low-income targeted group; articulation of reducing poverty policy and economic policy)

Source: Author.

inspired by social democracy. During this stage of the modifications, especially during the Cardoso administration and the beginning of Lula's, social policy was being regulated with a focus on poverty and a cash transfer program.

The third stage of creation of the current social public policy system is from 2006 to the present. According to Fagnani (2011), social policies are articulated to a "macroeconomic strategy, directed to economic growth with income distribution" (p. 13).

This periodization allows an establishment of relationships between the stages of formatting and consolidation of the current Brazilian system of public social policy, and shows how each stage coincides with each administration. See Table 1.

There is a debate about whether there are differences or similarities between the Cardoso and Lula administrations, and how deep they run. Boito (2007) argues that social programs targeting the low-income population in the Cardoso and Lula administrations both neglect universal social policies. Because of this situation, some members of the lower middle class and the upper classes sought education and health services on the market, strengthening the sale of services.

Diniz (2007) understands that the differences between the Cardoso and Lula administrations are in the business sector favored by government policies. In the Cardoso period, state reform broke with the corporatism of the national development era and loosened state intervention in economic and social policies that had facilitated the assurance of international financial capital for the business sector. In the first period of the Lula government, economic policies retained macroeconomic policy and the hegemony of finance capital, but were implemented with objectives for development, and the business sector was linked to productive national capital.

Boito (2005) also notes that in both governments, the prioritization of compensatory policies through cash transfer programs was aligned with the "neoliberal ideological discourse that stigmatizes social rights as privileges" (p. 54). Fagnani (2005, p. 551) notes the alignment of Brazilian social policies with the neoliberal

Table 2. Examples of Brazilian Policies for Poverty Reduction (Cardoso, Lula, and Rousseff Administrations)

Policies and program names	Government
Previdência social (noncontributory program)	All governments (programs required by the Federal Constitution)
Benefício de Prestação Continuada da Assistência Social	
Comunidade Solidária and Comunidade Ativa programs	Cardoso
Bolsa alimentação	
Auxílio Gás	
Bolsa Escola	
Bolsa Alimentação	
Programa de Erradicação do Trabalho Infantil	
Fome Zero programs	Lula
Bolsa Família	
Programa de Aquisic¸a˜o de Alimentos	
Programa Nacional de Fortalecimento da Agricultura Familiar	
Microcre´dito produtivo orientado	
Cisternas de Água	
Brasil sem Miséria programs	Rousseff
Bolsa Família	
Bolsa verde	
Programa de Aquisição de Alimentos	
Ação Brasil Carinhoso	
Programa Água para Todos	
Minha Casa Minha Vida	

Source: Author.

guidelines of institutions such as the IMF, especially during the Cardoso administration, but Draibe (2003) does not agree. According to him, the programs for combating poverty, under the mantle of universal programs, had the potential to "reduce the chances of reproduction of inequality" (p. 11); therefore, the allocation of resources to targeted groups was linked to universal policies, not replaced by them. Table 2 presents examples of Brazilian social policies for poverty reduction.

Neri (2007, 2011) and official data from IPEA (2012) state that the policies with selectivity criteria and cash transfers implemented under Cardoso, Lula, Rousseff's administrations have had positive effects, reducing income inequality and reducing poverty. There was continuity of public policies to combat poverty in the Cardoso, Lula, and Rousseff administrations, regardless of their different party affiliations, ideological positions, priorities, and budget options, and in how they created social public policy in general.

During the Lula and Rousseff administrations, the global economic crisis worsened and the international financial institutions increased their push for economic austerity, a smaller universalist social protection system, and prioritization of the allocation of spending and social services to impoverished groups.

Table 3. Examples of Social Policies for Poverty Reduction in Some Latin American Countries, After the 1990s

Policies and program names	Country
Progresa; Oportunidades	Mexico
Bolsa Bolivariana	Venezuela
Plan Bolivia	Bolivia
Chile Solidário	Chile
Tekopora	Paraguay
Familias en Acción	Colombia
Plan Famílias	Argentina
Programa Juntos	Peru
Bono de Desarrolo Humano	Equador
Red de Proteción Social	Nicaragua
Asignación Famílias	Honduras
Supere´monos	Costa Rica
Mi Familia Progresa	Guatemala
Red Solidaria	El Salvador
Red de Oportunidades	Panama
Programa Solidaridad	Dominican Republic

Source: Author.

At the same time, international organizations regard Brazilian social policies for poverty reduction as models, and data about the positive effect of these policies implemented in Brazil since the early 2000s are diffused internally and internationally (IPEA, 2012; Neri, 2007, 2011).

Besides Brazil, other Latin American countries also implemented similar policies and programs, as is shown in Table 3.

Brazilian leaders and policymakers shared values and institutional arrangements that were spread internationally, and Brazilian public policies for poverty reduction were models diffused internationally.

Conclusion

How do international theories of Policy Diffusion and Transfer contribute to the understanding of social public policies for poverty reduction in Brazil beginning in 1995?

The articulation between Brazilian public social policies to fight poverty and extreme poverty, learning and cultural dissemination, and international institutional incentives is both "positive" (isomorphic) and "negative" (they are based on common concepts but move apart from each other). In the Cardoso and the first Lula administrations, there was a greater degree of incorporation and contagion of international requirements in comparison with Lula's second administration and Rousseff's, when Brazilian cash transfer policies were disseminated and considered successful models.

The negative relationship is observed in the preparation of the 1988 Federal Constitution that, inversely to the neoliberal international environment, consolidated the state's social responsibility and the combination of universality and selectivity of the coverage. The isomorphism is identified in the Cardoso, Lula, and Rousseff administrations, in the accordance with international guidelines regarding policies toward low-income populations and in Brazilian cash transfer policies that the international political community considers a model. In the last two administrations, we observe negative modeling in social and economic policies and growth of public social spending—contrary to recommendations from international financial institutions on austerity with reduction of social policy—and positive modeling due to the centrality of targeted groups and the risk to the universalist perspective or the risk of the weakening of universality conceptions in the framework of public social policy.

In specialized literature there is evidence of the relationship between international culture and institutions and Brazilian social policy concerning poverty.

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Notes

[1]The Bolsa Família program, Fome Zero, and Brasil sem Miséria are part of the "umbrella policies." Data about the positive effects of social policies are found in the document "A década inclusiva," available at http://www.ipea.gov.br/agencia/images/stories/PDFs/comunicado/120925_comunicadodoipea155_v5.pdf

[2]National Counsel of Technological and Scientific Development (CNPq) funds this research.

[3]"As new research is designed, scholars should presume that the causes of policy origins are not necessarily the same as the causes of the subsequent development of policies, in part because policies themselves transform politics. Researchers should likewise be sensitive to precise time periods on national and world scales and attuned to processes unfolding over time. Analysts of states and social policies must, in short, become unequivocally historical in their orientation" (Skocpol & Amenta, 1986, p. 152).

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