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Working Paper No. 757

Expanding Social Protection in Developing Countries: A Gender Perspective*

by

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ABSTRACT

This paper discusses social protection initiatives in the context of developing countries and explores the opportunities they present for promoting a gender-equality agenda and women's empowerment. The paper begins with a brief introduction on the emergence of social protection (SP) and how it is linked to economic and social policy. Next, it reviews the context, concepts, and definitions relevant to SP policies and identifies gender-specific social and economic risks and corresponding SP instruments, drawing on country-level experiences. The thrust of the paper is to explore how SP instruments can help or hinder the process of altering rigid gendered roles, and offers a critical evaluation of SP interventions from the standpoint of women's inclusion in economic life. Conditional cash transfers and employment guarantee programs are discussed in detail. An extensive annotated bibliography accompanies this paper as a resource for researchers and practitioners.

Keywords: Social Protection; Social Assistance; Gender; Women; Public Works Programs; Conditional Cash Transfers; Development; Employment Guarantee Programs; Social Protection Floor Initiative; Developing Countries

JEL Classifications: J13, J16, J18, O1, O11, O15, O19

1. INTRODUCTION

Social protection has emerged as a strategic component in the policy agenda of developing countries. The challenges sought to be addressed by currently discussed social protection frameworks are not novel. Yet, a shift in focus is in evidence. In the past, especially in the context of many developing countries, social protection schemes were introduced as a “safety net” in periods of heightened risks due to rapid deterioration of living standards of households and individuals in (or near) poverty. Such cases of heightened risks and vulnerabilities have included, for instance, the aftermaths of environmental stresses and natural disasters, sudden food and fuel price spikes, episodic financial and economic crises, and the damaging social and economic consequences of structural adjustment policies and austerity programs.

Gradually, though, it became clear that stop-gap safety net interventions had short-lived impacts because, over time, it was shown that as soon as they were removed, the underlying issues that had locked people in vulnerable positions to begin with were still left intact. Equally important, the recent global crisis—set off by the subprime mortgage debacle in the United States in late 2007—highlighted that countries with well-integrated social protection systems were better prepared to have timely and effective responses. From its more restricted one-off protective function, the focus of social protection policies has by now shifted to that of investing in longer-term, integrated large-scale population coverage interventions.

Given the renewed interest in social protection, epitomized in the 2009 Social Protection Floor Initiative (ILO 2009), this paper focuses on gender dimensions with a view to contribute to ongoing debates on locally adapted social protection dialogue initiatives. The paper is organized into two main sections, which can be read in conjunction with each other or separately. The first part offers a general background on the emergence of social protection and on how it is linked to economic and social policy. The second part intends to facilitate gender awareness and examines opportunities that are presented from the standpoint of empowerment and promotion of equality for women. Particular attention is paid to two social protection instruments that have gained currency over the last decade, namely, conditional cash transfers and employment guarantee programs.

2. SOCIAL PROTECTION: CONTEXT, CONCEPTS, AND DEFINITIONS

Over the years, the objectives, targets, and meaning of Social Protection (hereafter, SP) have evolved substantially (see Annex 1; Kabeer 2008b; Barrientos and Hulme 2008; Holmes and Jones 2010). The call in recent times is for expansion (Social Protection Floor Initiative) and coherent integration of SP policy within the framework of an inclusive growth agenda. Inclusive growth entails ensuring that everyone can *participate* in the economic growth process and that benefits of growth are *shared equitably* across social classes. Such an objective, in its genuine policy expression, ought to be rooted in the notion that production, distribution of income, and redistributive mechanisms must be coherently integrated: economic participation without equitable benefit sharing makes growth unjust. On the other hand, sharing the benefits of growth through social assistance without promoting fair and full economic participation for all citizens renders growth biased, favoring some groups while leaving others behind. The aim, therefore, in many respects, is to explore synergies and integrate in a coherent and consistent manner policy instruments and objectives of Social Protection with Productive Inclusion. Before we move on to gender issues, SP policy will be framed in the larger context of economic and social policy. Important definitions and concepts will be clarified as they are encountered along the way.

2.1. Economic Policy, Social Policy, and Social Protection

The overarching goals of economic and social policy have traditionally been the growth of output (and its counterpart, income) and improvement in citizens' standard of living. High growth rates enlarge the overall availability of material goods that fulfill basic needs and other conveniences of life. While the pace of growth for each country depends on a host of nationally and internationally circumscribed conditions, the distribution of its rewards among different segments of the population is influenced by the quality and quantity of productive inputs, their efficient use and sectoral allocation, and ultimately, the rewards assigned to those who participate in production (owners and managers of various productive resources and workers). Production—and hence creation of goods and services valuable for society—on the one hand, and distribution of income on the other form the basis of a society's evolution of equally shared benefits. Social policy interventions contribute to wellbeing and social cohesion by ensuring a wider sharing of prosperity through redistributive actions. To a large degree, then, reduction of income poverty and multiple inequalities, including their gendered forms and dimensions,

reflect the *joint impact* of effective economic and social policies. Social protection interventions are part of social policy.

2.1.1. *Improving Living Standards: Economic Growth and Social Policy*

Pathways to economic development have varied across time and countries considerably. Yet, the principal aim of economic policy has always been to create conditions that facilitate investment and structural shifts of resources into higher-productivity economic activities (Chang 2002). For the vast majority, much of the observed improvement in material wellbeing and poverty reduction has occurred through the reallocation of *labor* from less to more productive activities and sectors, expressed in improvements in agricultural production and considerable creation of better-paying jobs in other sectors of the economy. However, uneven outcomes have always been in evidence, manifested in divergent growth rates (and per capita income) between countries, dual economic structures within countries (one progressing rapidly—the other lagging behind), and also in periodic, albeit systemic, cyclical growth patterns which put downward pressure in overall economic activity. Job creation fully mirrored these uneven patterns. As a consequence, at the national level, even prior to but especially in the post-1930s Great Depression era, a host of state-led stabilization measures and redistributive actions were deemed necessary. The key policy levers, enabled by publically administered “tax and spend” as well as deficit financing, have centered on countercyclical policies, provisioning of public goods and services, income protection systems, and active labor market policies, which have been introduced by countries in a variety of combinations. Essentially, the intention was to remedy unintended but structurally adverse consequences of uneven growth patterns. Social policy interventions, in particular, modified earned incomes and, as a result, increased the space of commodities and capabilities of lower-income households.

The range, therefore, of functions and obligations the state had to fulfill in leading its citizens toward shared and stable prosperity included economic policies to promote dynamic markets’ use of resources and social policies to promote societal cohesion by reducing inequalities and poverty that market-oriented production processes could not achieve on their own.

2.1.2. *The Economic Content of Social Policy*

What must be emphasized is that social policy performed a social but also an economic function.

Alongside earned incomes that power consumption expenditures and profits that are key to driving up investment, government spending on infrastructure, social services, and income maintenance programs was relied upon as a constituent part of aggregate demand. In fact, it was understood to be instrumental to the stability and healthy expansion of private sector growth. This is a very important point in regards to social protection: What may appear at first sight as a “cost” (especially when fiscal space is limited) is, literally speaking, an investment; it places a floor to economic downturns and propels economic activity toward growth in times of prosperity. It does so—not euphemistically—and not only from a human capital/human development perspective, but also from an empirically tested economic growth standpoint, generating what is referred to as “backward and forward” feedback loops. When public spending is directed to physical and social infrastructure, purchases of necessary inputs stimulate production in a variety of sectors (i.e., construction materials) which, in turn, signals demand for added production to their suppliers (i.e., cement factories), and so on and so forth. The received wage incomes, including those that provide social services, also fuel demand for consumption goods, further increasing demand for labor and wages to those employed by businesses, and stimulate more production and consumption. The latter “multiplier” effects are found to be particularly strong in their capacity to create jobs whenever public investments are channeled to the naturally more labor-intensive sectors of services, such as education and health (Antonopoulos 2009, Antonopoulos and Kim 2011). Social sector and social protection spending has particularly strong economic and employment generation content.

2.1.3 The Emerging Centrality of Social Protection

Dominant views on how to get an economy on a growth path have seen many revisions in the last century, with a major shift in ideas occurring in the 1970s in the US and England, which favored a minimal role of government spending. With this shift, the focus and range of desirable economic and social policies changed as well: the role of the state in planning industrial and agricultural policy as well as the ability to control financial capital flows was minimized. Financial and trade liberalization was thought to improve production efficiency and institutional agreements at the international and national level established new rules of conduct. A discussion on the merits of diverse development strategies is beyond our scope and we cannot do justice to such an important topic in the space available here. For the purposes of this paper, it suffices to note two stark trends.

First, starting in the 1980s and during the following decades, many developing countries ended up adopting (willingly or not) structural adjustment and austerity policies, typically accompanied by a significantly scaled-back size and role of the state. Protracted economic slowdown and reduced spending on social provisioning soon followed. In recovering countries and those that have, as of late, exhibited strong growth rates (such as India and China), formal and high-paying job creation has been anemic. Instead, throughout the world, the rule has been an expansion of low-paying, informal, and precarious work. Recent developments also show that an extreme emphasis on balanced government budgets, even in the midst of rapid economic deterioration in European countries, has all but eliminated the important functions of countercyclical policy. To date, the job deficit and the unemployment crisis that plague many countries (from South Africa and Tunisia, to Spain and Greece) are not at the center of policy attention despite the fact that roughly 200 million people worldwide are jobless. The working poor, the population still trapped in very low-level productivity work, includes 397 million workers who are living in extreme poverty and an additional 472 million workers who cannot address their basic needs on a regular basis (ILO 2013).

The second trend concerns the global economy. Worldwide integrated production and financial systems have created opportunities for some, but also severe challenges for other segments of the world's population. The recent overcast economic climate in Europe and the US has been accompanied by successes registered in rapidly developing and emerging market economies (Brazil and Turkey, for example) for some time now. This may be modifying trends, but the overall record over the last hundred years is one of growing inequality between and within countries.¹ At the same time, while the fortunes of financial sector activities have increased exponentially, multiple food, fuel, and financial crises spreading contagion across countries have imposed costs that hit the poor and poorest harder (van der Hoeven 2010).² Moreover, coordination and effective natural resource management is not making speedy

¹ It is of interest to note that inequality of growth and incomes between nations has risen over time. In 1960, the average income of the richest 20 countries was 53 times more than that of the poorest 20. By the year 2000, it had risen to 121.

² Recent financial and contagion crises are Mexico in 1985 and 1994, the Asian Financial Crisis of 1997, Russia 1998 and Brazil 1998–99, and the ongoing American and European crisis since 2007 with global repercussions. With deepening interdependence and integration of financial markets, the dangers of fluctuations in commodity (futures) prices are heightened as well. For instance, speculative currency attacks restrict the use of high level reserves in foreign currency on social programs, in order to guard its own currency. The World Bank estimates that due to the financial crisis, between 53 and 79 million people are falling below the poverty line of \$1.25 and \$2.00 per day, respectively (Ravallion 2009). Rising food and fuel prices are believed to have contributed to the increase in the poverty incidence by 100 million people (World Bank 2008).

inroads, and climate change threatens already fragile environments with dire predictions of wrecking further havoc, especially to those whose livelihoods depend on forestry, fishery, and agriculture. The presence of these patterns keeps substantial segments of the world's population in chronic poverty, unable to meet basic needs and highly vulnerable to covariate (i.e., correlated to incidence of floods and droughts), idiosyncratic (i.e., ill-health) and systemic risks (i.e., structural economic characteristics of development paths and social relations that reproduce fundamental inequalities).³

It is in the context of these trends and new vulnerabilities that since the mid- to late 1990s, SP policy has become even more indispensable, calling for renewed energy and resources. The Millennium Development Goals (MDG) first, the recent 2009 Social Protection Floor initiative, and the emphasis on inclusive growth have been particularly instrumental in their attempt to refocus the policy dialogue on these concerns. The need for better alignment of growth with human development, decent job creation, and security for all is being highly prioritized in many parts of the world.

The conclusion drawn, then, is the following: For the vast majority of the poor, income gaps are associated with entrapment in low wages, low-productivity work, informality, and joblessness. SP is a life-line for the poor (preventing destitution), but it cannot serve as a substitute to addressing the undesirable outcomes of labor markets and misguided development strategies. Yet, it must be kept in mind that SP can potentially be a contributing factor to equitable and inclusive growth. It can, in fact, be a part of a coherently articulated distributive and redistributive realignment that mobilizes underutilized domestic labor resources while redirecting access to income and public services in ways that reduce inequalities.

2.2. Definitions and Taxonomy of Instruments

To flesh out the contours of SP initiatives and their objectives—which are essential to our discussion of gender issues—we turn now to some definitions.

Social policy encompasses a host of principles, legislation, institutional arrangements, and concrete actions the state undertakes with the aim to *improve the welfare and living conditions* of the population. Although the delineation of social policy agendas reflect

³ To date, with financial sectors absorbing most of the policy attention and resources, a wage-led/domestic consumption/employment-centered agenda is (very) slowly emerging (United Nations Department of Economic and Social Affairs 2010).

negotiations among social groups and actors, a substantive part of social policy has always involved provisioning of basic physical infrastructure, public goods, and social services, including health and education and active labor market interventions (for protracted unemployment and facilitation of labor market [re]insertion). Added to this function of the state has been the undertaking of a host of initiatives that provide *social protection*.

Social protection systems (also known as social security systems) embody a society's pathways to *safeguard the standard of living* of its citizens. Preventing, mitigating, and helping to overcome adversities that otherwise would increase income volatility—and hence vulnerability to income insecurity or poverty—two predominant forms can be discerned: 1) *social insurance* and 2) *social assistance*. A contributory social insurance addresses old age, unemployment, accident, illness, disability, and survivors of wage-earning persons. Social assistance, financed by tax revenue in general, addresses acute or chronic poverty, vulnerabilities of old age and children, or natural disaster through transfers of cash or in-kind (Gentilini and Omamo 2009).

Social insurance schemes originated in Europe and were first introduced in the 1890s; they were gradually adopted in many other countries throughout the world. They were meant to provide protection for civil servants and those employed in large-scale private sector enterprises against loss of income due to a) old age, b) unemployment, and c) injury or illness. Entitlements of benefits to retirees, those temporarily out of work, or those physically no longer able to work are funded through a pay-as-you-go pulled insurance system, paid out of mandated contributions made by workers who are currently employed, their employers, and the state (via general taxation revenue). In time, health insurance benefits were also added. To date, as only workers in formal employment participate in such insurance schemes, such cash benefits cover solely a small fraction of the world's population; in fact, worldwide comprehensive coverage (a + b + c above) stands at less than 25 percent of those of working age. Considering old age pensions, for example, large scale coverage⁴ of those 65 and older exists mainly in Western Europe and Northern America, but reaches only 30 percent of the elderly in Latin America, 20 percent in Asia, North Africa, and the Middle East, and less than 5 percent in Sub-Saharan Africa. Informal workers do not have access to such formal schemes, with a notable exception being

⁴ “Globally, the theoretical coverage of existing statutory contributory pension schemes should amount to nearly 40 percent of the working-age population (and 50 percent of the economically active population). In practice, however, the effective coverage amounts to no more than 25 percent of working-age men and women” (ILO 2010).

India, which introduced a special package for “irregular” workers in 2008. Also, we must note, some countries have introduced (minimum but stable) universal old age pension schemes—for example, Costa Rica—and other countries provide universal health coverage (such as Sri-Lanka). But the majority of the world’s population lacks such benefits, as they are associated with formal employment status.

Social assistance, on the other hand, encompasses all interventions geared to people living in chronic or deep poverty. Such programs exist in high-income countries as well, but comprise only a small proportion of social protection. With larger segments of people in poverty, *noncontributory* social assistance interventions have been the main focus in the least, low, and middle-income countries. Hence, in the context of developing countries, social assistance programs have traditionally comprised a significant portion of social protection. The existence of divergent regional paths has been well documented in the literature and safety nets have evolved in much more permanent interventions with countries building progressively stronger administrative and institutional capacities and expanded population coverage. Initiatives can be grouped into four broad categories (Cook and Kabeer 2009)⁵:

- 1) Conditional cash transfers directly to mothers or primary caregivers of children and adolescents aim to encourage retention of school children within the education system.
- 2) Employment Guarantee programs and public works programs provide a job and pay wages to unskilled and low-skilled members of poor households who cannot find paid work.
- 3) Subsidies or free access to food, services, and productive inputs with food, education, and health are delivered in the form of vouchers, cash, in-kind rations, fee removal, and grants for inputs and assets for production (i.e., fertilizers, a sewing machine, small animals, etc.).
- 4) Social pensions are cash stipends to the elderly, disabled, orphaned children, or people living with debilitating illnesses, such as HIV/AIDS.

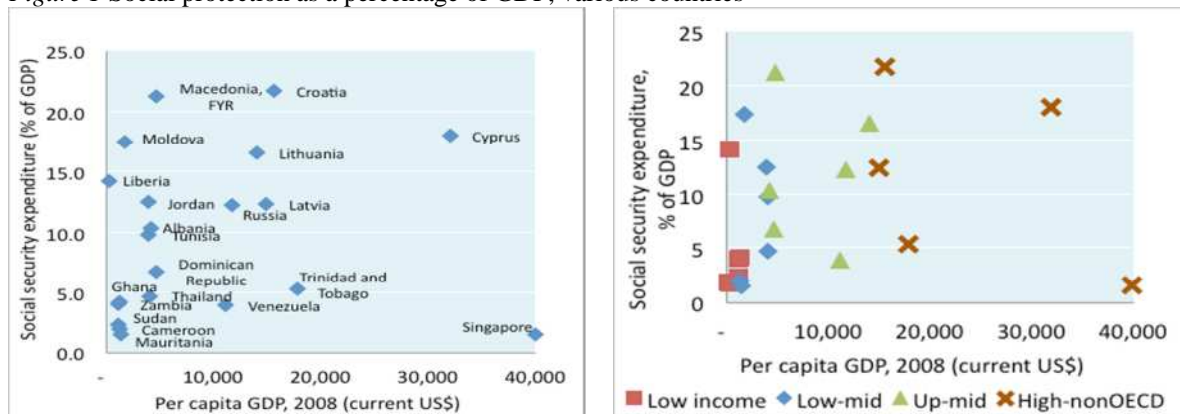
⁵ Existing social protection instruments have been classified according to a variety of criteria. Kabeer (2008b) classifies based on the stage of the life cycle they are meant to address. Devereux and Sabates-Wheeler (2004) identify the instruments based on their functional purposes: preventive, protective, promotive, or transformative instruments. Barrientos and Niño-Zarazúa (2011) simplify the classification based on two types of transfers: income and income-plus. Targeting is another usual method of grouping the instruments—self-selection, means-tested, or universal coverage (UNRISD 2010).

2.3. Affordability

Great concern is often expressed on the degree to which such initiatives are affordable for low-income countries. Yet, data show very powerfully that high levels of SP spending (as a percentage of GDP) are actually compatible and viable in low-income countries; similarly, higher levels of per capital GDP, i.e., middle-income countries, may allocate only small fractions of GDP to such SP programs. As Figure 1 indicates, the amount of spending on social protection as shown (on the vertical axis—referred to as social security at times) is not influenced exclusively by the income group a country belongs to (horizontal axis), which is in fact in line with the introduction of high-level spending on social insurance systems in many European countries at historical junctures that placed them in low levels of economic development.

ILO (2008) provides more evidence on irrelevance of economic prosperity and social protection spending. The study estimated the costs of a comprehensive social protection program, which includes (1) basic old-age and disability pensions (benefits set at the rate of 30 percent of GDP per capita); (2) benefits at the rate of 15 percent of GDP per capita for the first two children below the age of 14; (3) 100 days guaranteed employment at a wage of 30 percent of GDP per capita for 10 percent of the working age population; and (4) essential healthcare based on one health professional per 300 persons. The study examined 12 countries, seven in Africa (Burkina Faso, Cameroon, Ethiopia, Guinea, Kenya, Senegal, and Tanzania) and five in Asia (Bangladesh, India, Nepal, Pakistan, and Vietnam), using projections for the years 2010–30. The fiscal requirements ranged from a maximum of 10 percent of GDP for Burkina Faso to as little as 4 percent in Guinea.

Figure 1 Social protection as a percentage of GDP, various countries



Source: Author's calculations based on World Social Security Report 2010–2011 (ILO), annex, table 25 data; and World Development Indicators 2008 (in current USD). (Refer to World Bank database.)

This general introduction provides a context that allows us to discuss more particularly social protection and social assistance initiatives from a gender perspective, to which we turn next.

3. SOCIAL PROTECTION THROUGH A GENDER LENS: OPPORTUNITIES FOR PROMOTING A GENDER EQUALITY AGENDA

As indicated earlier, SP initiatives in developing countries have focused on social assistance that entail noncontributory transfers, meant to address income poverty and deprivations of basic services. Many countries are in the process of expanding the scope and scale of Social Assistance measures so that—also according to the recommendations of the Social Protection Floor initiative—gradually and progressively a comprehensive SP policy for all citizens is put in place. From a gender equality perspective, this opens valuable space for a consideration of current practices at the domestic and international levels so that women's empowerment concerns may be included in the unfolding current dialogue.

Despite the fact that material deprivations are experienced at a *personal* level, for guidance on choice among possible SP interventions, it is *group* characteristics that serve as important identifiers. Differences—between men and women and among women themselves—in age, gendered roles and responsibilities, geographic location, health and employment status, cast, ethnicity, etc., produce distinct risks and vulnerabilities and hence require diverse interventions. Identifying the predominant group characteristic, sometimes, immediately

recommends an appropriate SP/assistance instrument. For example, income poverty among the elderly, despite controversy regarding the efficacy of universal access or means-tested and other targeting criteria, points directly to old-age social pensions as the appropriate remedial instrument (UNRISD 2010).

What may constitute “best” type of intervention and “most effective” delivery mechanism in addressing many other kinds of *group income deficits* is not always as straightforward and, in fact, is more than a technocratic question that can be answered solely on the basis of existing and otherwise valuable program impact evaluations. It depends, first and foremost, on local adaptability and national decision-making processes and participation of key stakeholders. It also depends largely on ideas about poverty and how it can be reduced, and in our context, on views, interpretations, and ideologies about women’s roles in households, communities, and in the world of work.

3.1. Underpinnings of a Social Protection Framework that Promotes Women’s Empowerment and Gender Equality

Choices, then, of SP instruments depend on the intended vulnerability they are meant to tackle, but also on the lens through which one sees those who live in poverty. From the perspective of women’s economic empowerment, this is a point worth dwelling upon.

Women’s economic and social empowerment is a process and an outcome. As an outcome, it is manifested in the degree of achieved autonomy (legal, material, and physical), equality (in opportunities, rights, and outcomes) and voiced influence (in strategic decisions that affect their lives within and beyond households). As a process, empowerment involves transforming (rupturing) gender-based *inequality-(re)producing relations* so as to enable women’s full participation in economic, social, political, and cultural structures within which they experience their lives.⁶ From this standpoint, the opportunity SP initiatives present lie in that while redressing gender-specific risks, they can promote women’s empowerment, provided they are informed by the objectives of increasing autonomy, equality, and voiced influence. Amartya Sen drew attention in the early 1990s to the critical difference between “protection”-oriented SP interventions and those that lead to “promotion,” the latter referring to initiatives

⁶ How this is to be achieved is a contested terrain but included are: women’s own demands and collective action; changing winds of ideas and ideologies and interests; evolution of economic and social policies; public actions that fulfill domestic and international commitments that promote equal women’s rights; and initiatives that promote a renewed sense of self-esteem (Kabeer 2008a; Molyneux 2007, 2009).

that increase and promote the ability of people to secure a livelihood.⁷ This distinction serves as a pertinent entry point for the purpose of this discussion.

To give a concrete example, consider a few gender-informed alternatives that can potentially promote food security: a family cash-transfer for purchases of necessities—made payable to women as they are the key managers of the household’s well-being; free delivery of staple food (rice, maize, milk, etc.) also rationed directly to female heads of households; and agricultural extension services plus price subsidies of seeds and fertilizers specifically with the aim to increase food sovereignty, dedicated to cooperatives of women farmers. All three initiatives have an identical objective: reduction of food insecurity. Yet, a stark difference is evident in terms of the process through which deprivation is addressed and most importantly from a gender perspective, in the (implicitly) assigned *position* of the beneficiary.

The first addresses income poverty by enabling women beneficiaries to participate in the economy *as consumers, which they otherwise cannot do on their own*. The second, in the case of free rationed food, directly allocates food to those deserving of support because of their *destitution status and inability to cope*. The third approach addresses the income gap through means that enable the beneficiary to *engage productively* in the economy, as a *producer by addressing concerns of social equity*. While all three reduce an identified deprivation, the last one acknowledges it as an outcome of social relations of exclusion, (i.e., women do not receive the same level of agricultural support), which often underpins people’s experiences of chronic poverty and vulnerability. In a seminal paper, Devereux and Sabates-Wheeler (2004) point out that among SP interventions, some are deeply *transformative* in nature precisely because their ambition is to sever existing *socially binding relations* and constraints. On a world scale, the latter intervention, according to a 2011 report of FAO, would reduce the number of hungry people in the world by 12 to 17 percent, or 100 to 150 million people.⁸

The above example does not provide universal guidelines on choices of SP instruments. Country and territorial conditions may necessitate the privileging of one option over the other, but there is also a danger of “path dependency” so to speak. It also leaves open the question of what may be “appropriate” *transformative* instruments for different groups of women, i.e.,

⁷ Devereux and Sabates-Wheeler (2004) introduced in their seminal paper the terminology of “protection-prevention-promotion-transformation” potential of interventions. They provide a useful reference point to examine opportunities and challenges of SP from a gender-equality perspective.

⁸ This could raise total agricultural production in developing countries by 2.5 to 4 percent, which could in turn reduce the number of hungry people in the world by 12 to 17 percent, or 100 to 150 million people (FAO 2011).

women who are landless or whose livelihoods are not linked to land cultivation, women who are unable to participate as producers because they have too many responsibilities already within their household, including taking care of infants, orphaned children, or disabled persons. We will return to this shortly. The key point here is to recognize that *how* reduction of income and consumption poverty takes place, assigns (intentionally or not) different social roles and hence distinct socioeconomic *positioning* of the intended beneficiary group. Being mindful of these concerns, for poverty reduction and from an inclusive growth perspective, SP policy can ensure that unleashing women’s potential to secure sufficient incomes (consumption) *in their own right* remains a priority. In addition to expanded autonomy and equity, many studies have already documented the importance of women’s contribution to growth and poverty reduction, including a recent one that focused on such impacts should labor force participation of women in Latin America increase to approximately that of men’s participation (IPC-IG 2010). SP policy must be informed by a vision that “sees” women as active economic agents and avoid the tendency of *positioning* women in passive recipient roles. Simply put, much like all members of society, women intrinsically possess the ability to engage in income generating activities as producers and wage earners.

Given that, the social and economic risks and vulnerabilities women face are the result of multiple and overlapping binding constraints they face—which, as we will see, combine with a gendered pattern of unevenly distributed benefits growth yields.⁹ Social protection policies cannot be expected to singularly lead the way toward women’s empowerment. Rather, gender awareness can contribute to the consistency with equality and empowerment principles of social protection. To provide some useful inputs in this direction, the remainder of this paper is informed by two overarching objectives:

- 1) To identify gender-specific social and economic risks and corresponding available SP instruments that can potentially be used—based on country-level experiences.
- 2) To explore if and how available SP instruments potentiate (or not) the loosening up of rigid social roles—so that innovative features can be added to steer them in that direction.

⁹ Kabeer (2008b) proposes a useful typology of constraints that limit women’s opportunities: *gender-specific* are those associated roles assigned according to prevailing norms, custom, and practices; *gender-intensifying* are those among the norms that result in inequalities of distribution of food, health care, and asset ownership; and *gender-imposed* are those that are enacted and reflect inequalities in the public domain.

3.2. Identifying Gender Vulnerabilities, Creating Gender Equitable Opportunities

Unequal distribution of resources and power affect women's rights, opportunities, and outcomes at all stages of their lives. The Convention on the Elimination of All Forms of Discriminations against Women (CEDAW), the Beijing Platform for Action, numerous ILO Declarations and Conventions, including the recent Convention No. 189 on "Decent Work for Domestic Workers," the Paris Declaration, and MDG goal 3 and a number of targets, represent commitments that fully acknowledge the importance of eliminating gender discrimination and inscribed inequalities.¹⁰ The opportunity in social protection is to explore how gender mainstreaming and gender programming can influence the custom tailoring of existing interventions so as to address a host of challenges women face.

3.2.1. Gender Risks and Vulnerabilities: Early Stages of Life

The social protection addresses both life-cycle risks and livelihood risks. For women, the two are intimately intertwined during much of their adult lives. This section will address gender-related risks women face as income earners and as members of poor households. Because gender-differentiated risks begin with the earlier stages of their life, we begin with a brief description that is relevant for the instruments that address vulnerability from infancy to adolescence.¹¹

Gender *roles*, inequalities, and deprivations begin inscribing themselves in early stages of life and get solidified in childhood and adolescence. It is well known that birth to two years of age is a "critical window" for the promotion of good growth, health, and behavioral development. Vulnerability to lack of adequate nutrition, medical attention, physical security, and mental stimulation for both female and male infants of poor households are well documented, but evidence shows they are exacerbated by unequal allocation of resources between boys and girls. At a pre-school age, children are uniformly vulnerable to being unattended when adults are engaged in (paid and unpaid) work or left with unreliable caregivers, running many risks, including sexual abuse, which is a heightened risk for girls all along their

¹⁰ Included are the International Labour Standards (ILS) with direct relevance to poverty alleviation: Minimum wage, 1970 (No. 131), Rural Workers' Organizations, 1975 (No. 141), and Indigenous and Tribal Peoples, 1989 (No. 169), Home Work Convention, 1996 (No. 177), Convention on Decent Work for Domestic Workers (No. 189)—of specific significance for poor women, Declaration of (1998)—to integrate fundamental principles of rights in socioeconomic development (to set a social floor) and the recent Convention No. 189 on "Decent Work for Domestic Workers," and a supporting Recommendation No. 201.

¹¹ In that, we draw inspiration from the life-cycle framework developed by Kabeer (2008a) and Kabeer (2009).

early stages of life. School age children are found not attending school due to user fees, distance required to reach educational facilities, and child labor, mostly as domestic servants for girls and in agriculture, fishing, or industrial trades for boys (UNICEF 2010). Household dissolution due to extreme poverty and when parents are lost to pandemics including HIV/AIDS, cross-border and ethnic conflict, drug trafficking, and extreme cases give rise to the phenomenon of street children or children-headed households, with the children left to attend to themselves and siblings at a tender age. If lucky, children end up under the care of relatives and especially grandmothers who are also poor. In lower-risk circumstances, added higher risks for girls come to the forefront due to domestic chore needs, child marriage, and a premium on boys' education; adolescent girls face particularly heightened risks of school withdrawal due to double burdens of work/school that become unsustainable if they are to fulfill their household duties and early pregnancy. Girls are also exposed to sex trafficking and higher health risk through sexual contact with older males or prostitution, but it is documented that in some contexts, boys suffer from consequences of male prostitution, as well. Prior to entering adulthood, in other words, children, but especially girls, experience income poverty through detrimental allocations of their time between education and work (paid and unpaid), deficits in developing uncompromised physical, mental, and emotional capabilities, and at times violation of their physical integrity. All along, a *gendering* process of their formation is unfolding, which takes place through observation and participation. Positive changes that occur through individual, collective, and policy actions can have profound effects on children and most especially on girls.

SP interventions aiming to close income gaps and reduce unpaid work requirements benefit children indirectly, while other measures—expansion of education and health services—benefit them directly. The summary list below is indicative of well-known domains of currently implemented SP assistance initiatives that can be scaled up, while comprehensive listings of country initiatives can be found elsewhere (Barrientos, Niño-Zarazúa, and Maitrot 2010).

- 1) Free infant immunization combined with free pre/post-natal care and nutrient supplements for lactating mothers and infants¹² (usually a part of the health system but specific SP interventions do exist, i.e., Macedonia, Namibia, Mexico).
- 2) Early childhood development centers for pre-school children (very limited coverage; innovative examples that reach poor households are that of South Africa and Mexico).

¹² National health systems and standards are required, but backlogs are found to be ameliorated by targeting the creation of community health centers and cadres of community-based workers.

- 3) Free school-feeding programs (address nutritional needs and result in successful school retention, i.e., in Kenya, Bangladesh, India, and other countries).
- 4) Removal of health and education fees (Cambodia, Indonesia, Sri Lanka).
- 5) Conditional cash-transfers (encourage use of educational services and upkeep of regular medical appointments, i.e., Mexico, Brazil, and many other countries).
- 6) Social pensions to households with orphaned children (South Africa).

3.2.2. Gender Risks and Vulnerabilities: Working-age and After

Social expectations placed on men and women about their respective productive economic engagement and household responsibilities result in highly differentiated gender-specific risks and vulnerabilities. Emerging patterns of precarious labor markets (as discussed in the first section), food insecurity, inadequacies in access to health services, proper living dwellings or potable water, land for cultivation and assets, and overall deficits in securing a livelihood through (paid and unpaid) work affect everyone. Yet, gendered differences in processes through which deprivations are transmitted and experienced and collective/behavioral coping mechanisms adopted are documented to vary between men and women, and they vary a lot.

Consider the following: When becoming landless, shame has manifested itself in high suicide rates among male peasants in South and Southeast Asia; stresses of protracted unemployment led to a severe drop in men's life expectancy to an average age of 49 years during the first decade of transition in countries of the former Soviet Union due to self-abusive behavior; distress male migration has been at times accompanied by permanent abandonment of women and children, a pattern observed throughout the world; and increased levels of violence against women are sadly, but not exclusively, associated with heightened and sudden idiosyncratic and covariate household poverty stresses.

For women, their vulnerability and stresses are accentuated when pre- and post-natal care, family planning, and reproductive rights are absent; lack of social care services for the disabled, those suffering from protracted illness, and the elderly add to their care obligations. Within households, when resources are scarce, they eat less, spend less on their own basic needs, and devote much of their time to caring for others first. Some risks are all the more pervasive for women and female-headed households including large movement of displaced populations, or when in widowhood, which for women is often accompanied by loss of assets to other family members and loss of dignity through dependence on the good will of others. In their older age,

unless they have access to a pension income, they are destined to live in abject poverty or continue to work despite physical ailments; it is also well documented that they carry disproportionately heavy care responsibilities where middle age adults are absent, lost to cross-border and ethnic conflict, HIV/AIDS or other fatal and severely disabling illness, and distress migration.

3.2.3. *Conditional Cash Transfers*

Conditional cash transfers (CCTs) are cash transfers to targeted households upon fulfilling predetermined behavioral conditions. The largest CCT programs are the *Bolsa Familia* in Brazil (12.5 million households), which was introduced first on a much smaller scale in Brasilia in the mid to late 1990s as *Bolca Escola*, but was renamed and expanded hugely since 2003; and *Oportunidades* in Mexico (6 million), originally named *Progresas* when introduced in 1997. Additionally, there has been a proliferation of smaller scale initiatives in over 40 countries with many still in a pilot phase.

The programs seek to address low levels of utilization of educational and health services for school-aged children and adolescents. This was a particularly pronounced challenge for girls, and it remains a challenge still for some countries. Accordingly, CCTs provide a cash stipend given to mothers or, in their absence, to other qualifying adults that function as primary caretakers of children. Thus, while it closes income (consumption) gaps, it improves school enrollment and retention rates of children and ensures mothers attend required routine medical appointments for their children. With a stated aim to interrupt intergenerational transmission of poverty deprivations (low levels of educational attainment and ill health), evaluations of CCTs programs prove they deliver on their promise. The attractive dual targets—household income and children’s well-being—has invited considerable research and impact assessment evaluation as well as donor support. From a gender-equality point, two features are important: (1) better education and health outcomes for girls, i.e., increased human capital, and (2) women’s empowerment aspects, emanating from a design feature of CCTs that mandates stipendiaries to be the mothers of the children (or a substitute primary caregiver over 15 years of age).

For better outcomes for girls, the rules of operation can include provisions of a graduated scale of cash awards, with higher amounts offered for older age children and for girls in particular. *Oportunidades* does exactly that, and excellent results are reported as the enrollment

of girls has been on the rise. New generations of healthier and more educated women are in the making and this is no small achievement.

A caveat, though, has been identified, in this regard: CCTs may unintentionally create a different intergenerational path of poverty transmission. As girls grow up in a cultural framework where “motherhood” status is recognized and cash rewarded (i.e., through state action for “good-mother” behavior), adolescents may also opt-in for CCTs, despite being better prepared for labor markets. The economic context actually invites such a choice: Domestic labor market structures are highly gendered and so are migration patterns. At the moment, in Mexico, for example, the national average of female labor force participation is 45 percent for women (*18 percent in rural areas*) versus 78 percent for men (*67 percent in rural areas*). If current patterns remain undisturbed, when market conditions are slack, young men *graduating out of Oportunidades* are more likely to be migrating out of their communities in search of work opportunities, while young women would be more likely to stay behind raising children. Incidental information to that effect is in evidence already, but robust experimental and nonexperimental impact assessments have not addressed this issue so far, perhaps due to longitudinal data requirements.

Women’s empowerment through CCTs stems from the fact that cash transfers clearly identify mothers as the direct recipients of the entitlement. Hence, symbolically, it is women’s (transferred) income that reduces household deficits in consumption and poverty. Practically, as it allows for greater income stability, women’s influences over household expenditure decisions are expected to increase. In addition, as control over income by women is found to shift spending allocations toward the wellbeing of children, women’s empowerment in the realm of voiced influence over decisions improves children’s lives beyond what CCTs mandate. Improvements in overall feelings of self-esteem and dignity in the ability to better take care of their children are expected to occur and are indeed counted among the indirect gender-empowerment achievements in many, but not all, research findings and reports of *Oportunidades* and *Bolsa Familia*.

The designation of a mother as a recipient of transfer, however, can limit a woman’s opportunities and functions other than being a caregiver.¹³ Mother’s caring for her children is embedded in feelings of love that can be deeply fulfilling. Concerns though are raised in that a

¹³ Some of the studies in the debates are: Molyneaux (2007, 2009), Bastagli (2009), Jenson (2009), Teixeira (2010), and Arif et al. (2011).

SP policy instrument that is treating a woman via a caregiver's identity over their span of reproductive years is mostly a reflection of ideological norms, which at the end, limits her life chances and options. The following issues deserve particular consideration as they express pertinent concerns to women's empowerment.

Much unease is expressed around the reinforcement of gender stereotypes by official policy. Being a "good mother" is inadvertently equated by CCTs with a full-time dedication of women's time to children's upbringing, which is what grants them primary "caregiver" status, i.e., it is the basis on which receipt of State income support takes place. Besides not being aligned with women's strategic interests, a caveat exists in that some mothers face substantial time constraints (in rural and urban areas) due to other work-related obligations. As they are unable to attend (mandatory) meetings for CCT participants or receive proof of children's school attendance, they are deemed mothers of "lesser" quality and are excluded from the program. This is ill conceived and unfair.

A different criticism centers around the fact that while this intervention is meant to allow the next generation to enter the labor market with better prospects, their mother's involvement in the world of work counts. If they are not being availed of means to become actively and productively engaged, it is as if exercising their economic rights is denied. This is unfair to the "mothers" but also sends the wrong signal to children (both boys and girls). Hence, the argument goes, if the intent is to increase household income, and women's income in particular, a focus should be on expanding livelihood options for "mothers" or unconditional cash transfers for labor supply households, both of which may serve as a preferable means of securing a minimum household income, which in turn would result in higher school attendance of children. Rather than relying exclusively on cash incentives, parents' attitudes toward children's education can be achieved through addressing the issues that keep them from sending kids to school.

Other issues have been raised around the ability of women to actually control the cash-transfer income and make decisions on its allocation. Results are mixed as they naturally depend on pre-existing power and control inequities, and CCTs cannot be held responsible for the pace at which they can be transformed. A more valid point concerns the very conceptualization of "empowerment," measured by most CCT evaluators by changes in patterns of consumption expenditures and improved freedom in mobility, which are both extremely context sensitive and indeed diluted and limited notions of transformative processes.

Next-generation CCT designs and programs should address these gender-specific concerns. Country level experiences with SP provide interesting ideas in this regard. For example:

- CCTs can become a *component* of a package of fully “integrated” interventions, an example of which is *Chile Solidario*, combining income transfers with health, education, employment, housing, and psychosocial counseling so as to simultaneously address different aspects of social exclusion and impoverishment with a clear component on *promoting economic engagement options* for mothers and their graduating daughters. Public service job creation (minimum pay jobs that serve their communities, as discussed later) can be offered to female graduates of CCTs for the first two years of their adult working lives.
- CCTs can be delinked from their “motherhood” focus by *expanding* their scope. Opportunities exist in integrating (or leveraging) existing SP country-level initiatives that can promote women’s economic empowerment whose performance and impacts would be synergistically improved if coordinated and coherently integrated. In Mexico, for example, a variety of such programs can be revamped, including *Programa Hábitat*, *Programa Organización Productiva para Mujeres Indígenas (POPMI)*, *Programa de Empleo Temporal (PET)*, *Programa de la Mujer en el Sector Agrario (PROMUSAG)*, *Programa de Apoyo al Empleo (PAE)*, and *Programa De Estancias Infantiles Para Apoyar A Madres Trabajadoras*.

From the gender perspective, CCTs should be either modified or alternatively be delinked from women’s empowerment agendas. Gender budgeting analyses would have to provide clear guidelines as to whether funding allocations to CCTs fulfill (even partially) women’s equality criterion. Budgetary allocations, women’s machineries, women’s mechanisms, and gender mainstreaming advocacy is at stake, and hence such concerns about CCTs ought to be debated and clarified.

3.3. Women’s World of Work: Inequalities and Systemic Risks

Women’s world of work is a continuum that entails paid formal, paid informal, own-account, unpaid contributing family, unpaid household production, and unpaid care and maintenance work (Antonopoulos 2008). Over the course of their lifetime, girls and women spend time across these domains of work in varying proportions. From a global perspective, regional

variations notwithstanding, results show that women stand at a disadvantage on several grounds.

3.3.1. *Inequalities in the Allocation of Time between Paid and Unpaid Work*

Women have the primary responsibility of household-based production and care provisioning. From maintaining a healthy and sanitary living environment, transforming raw ingredients into consumable products, collecting water or firewood to caring for infants, adults, the elderly, and the sick, the available time women can potentially devote to paid work, civic and community affairs involvement, skill improvement, and personal rest is severely curtailed. This intra-household inequality is a cost, a tax on women's time, and burdens are heavier for women when household incomes are insufficient and public services sparse. When combined with total hours of work (all forms of paid and unpaid) in developing countries, women work longer hours than men, as much as an estimated 40 hours more per week in many countries in Asia and Africa (Antonopoulos 2008; FAO 2010). If time poverty is incorporated into current measurements of income poverty, research has recently concluded that poverty and chronic poverty almost double, with a straightforward recommendation that social service prioritization that reduces unpaid work requirements for households in (and near) poverty is critical for poverty reduction strategies (Antonopoulos, Masterson, and Zacharias 2012).

Over half of all economically active women throughout the world belong to the most vulnerable worker category—own-account and contributing family work. Own account workers stand at the very bottom of the informal work pyramid and face irregular and unpredictable days of work, very low wages, and no social insurance of any kind. For examples, over 70 percent of employed women in Nepal belong to own-account workers, 65.5 in Rwanda, and 62.1 in Azerbaijan. Worldwide, one out of every four (25 percent of all women workers) are unpaid family contributing workers. The rates are alarming in many instances: in Pakistan, 65 percent of all women counted as “employed” are unpaid family workers; in Mozambique, 56.8 percent; and 47.2 percent in Vietnam, as in Table 1.

Table 1 Vulnerable employment for women in selected countries (% of total women’s employment)

Country	Own-account workers	Contributing family workers	Vulnerable Employment
Rwanda	65.5	30.0	95.5
Mozambique	39.1	56.8	95.9
Pakistan	12.8	65.0	77.8
Vietnam	31.3	47.2	78.5
Nepal	70.6	12.9	83.5
Azerbaijan	62.1	0.0	62.1
Georgia	26.7	37.9	64.6
Bolivia	32.5	34.4	66.8
Egypt	14.8	33.9	48.7

Source: KILM 6th edition, ILO 2009.

Note: The data availability years are as follows: Rwanda 1996, Mozambique 2003, Pakistan 2008, Vietnam 2004, Nepal 2001, Azerbaijan 2008, Georgia 2008, Bolivia 2007, and Egypt 2007.

Women have dismal levels of access and control over land, productive agricultural assets, and credit or extension services in rural areas, although they contribute vast amounts of work. In Sub-Saharan Africa and in South and Southeast Asia, for example, more than 50 percent of the female labor force is engaged in food production, but the average sub-Saharan region female-owned land is less than 18 percent—while in India, Nepal, and Thailand, the ratio is less than 10 percent of women farmers (FAO 2010). Where rural women are employed in wage work, they tend to be segregated into lower-paying occupations and are more likely to be in less secure forms of employment, such as seasonal, part-time, or low-wage jobs.

Paid work opportunities and income earnings are lower for women than for men. Labor market segmentation and gender-based wage gaps persist across income groups and occupations in urban and rural areas. Even among landless peasants, while men can find agricultural and non-agricultural day wage labor work more often, women are more likely to work alongside as unpaid “helpers” or find work as domestic workers, receiving no pay or a fraction of the daily rates of their male counterparts. In terms of wage and earned income gaps, there is no parity anywhere in the world and, therefore, as is well known, gender-based wage differentials are a common feature across all countries in urban and rural areas. The ratio of women’s to men’s total earnings range from 84 percent in Sweden to 49 percent in Macedonia. In some cases, such as in Timor-Leste, and in Georgia, Guatemala, Egypt, and Tunisia, to give some examples, women’s earnings are between 45 percent to one-third of what men earn (OECD 2009).

Yet, we must not lose sight of the fact that women alongside men also face the challenge

of global trends of insufficient job creation, precariousness of work conditions, and limited paid work opportunities, which are all systemic problems. Self-employment promotion and building up women's abilities as microentrepreneurs is often proposed as the key to poor women's economic empowerment poverty. Important as it may be, it cannot be hoped to provide in itself the pathway out of poverty either, and in any event, evaluation reports are very mixed on their longer-term sustainability and ability to reach those in deep poverty. On a world scale, less than 3 percent of the population works under an "employer status" and expanded definitions can bring this measure somewhat higher, but their prosperity is subject to the same vagaries: If demand for their labor is insufficient, which depends on solid demand for the output produced, the self-employed suffer, as well as those "working for others" under many different arrangements. Access to credit and inputs and achieving better human capital outcomes for all is important for women's equality, but not a panacea.

In summary, women devote too much of their time to unpaid work and too little to paid forms of work. They endure seasonal unemployment as agricultural workers and unpredictable demand for their labor when engaged in irregular and informal types of work arrangements, they lack social insurance, and they receive lower wages than their male counterparts.

Examples of currently implemented country-level SP initiatives that can potentially be expanded to address income gaps include:

- 1) Social pensions: Cash stipends for elderly persons reach all women over a certain limit (between 60 to 70 years old) who automatically receive a minimum pension. Examples include Botswana, Cape Verde, Lesotho, Timor-Leste, Nepal (2.4 million), Brazil, Philippines (2 million), and India (15 million). Cash stipends for households with disabled persons, people living with HIV/AIDS, or orphaned children in South Africa particularly benefit women and older women as they are the ones mostly responsible for meeting their needs (1.9 million).
- 2) Subsidies to vital inputs for production purposes: targeting women as, for example, the Ultra Poor (Bangladesh Rehabilitation Assistance Committee [BRAC], since 2002) in Bangladesh does, with a mix of asset (US \$300 per household) and cash transfers, skill training, and health and education support, is intended to promote self-employment in an integrated manner; the Starter Pack Program (since 1998/99) in Malawi provides input grants to poor farmers (seed for maize, soybeans, or groundnuts and fertilizer). The original plan for universal coverage of 2.7 million

households was eliminated and then reinstated in 2005. In one year, Malawi, from a food insecure status, graduated to that of being an exporter of maize. A big caveat as mentioned earlier is that differences in social roles necessitate that discriminatory practices must be addressed. FAO (2011) illustrates the gender gap in food security and access to resources for food production. While more than 60 percent of the female labor force is engaged in food production, less than 10 percent of women farmers own land in India, Nepal, and Thailand. In Jamaica, women farmers receive only 5 percent of loans granted by the Agricultural Credit.

- 3) Employment guarantee programs: These provide a job and a wage to unskilled and low-skilled members of poor households who cannot find paid work alternatives. Manual work becomes available based “on demand” by beneficiaries, namely, those who wish to register as workers that yield a benefit to the public on projects that traditionally have been in rural land upgrading, environmental projects, and building and maintaining public physical infrastructure. India, Ethiopia, and South Africa implement relatively large population coverage programs.
- 4) Subsidies or free access of food and services—education and health: These are delivered in the form of vouchers, in kind or fee removal. Some of the examples include the Food and Cash Transfer project (FACT, since 2005) in Malawi, which provides food rations plus an unconditional cash (US \$10) transfer to households, and female-headed households are found to particularly benefit from these initiatives; the Priority Action Program (PAP, since 2000) in Cambodia which is a removal of school fees and provisioning of remedial classes in primary education for the poorest families nationwide (excellent interventions for girls); and free milk programs for lactating mothers and very young children as in Mexico, by design, address women’s needs.

3.3.2. *Employment Guarantee Programs and Gender Issues*

We now turn our attention to employment guarantee programs (EGPs both because such initiatives account for the largest population coverage among all SP instruments, but also because within the space SP policy provides, this instrument uniquely closes income gaps through expansion of *livelihood options* via noncontributory employment security. We will devote considerable space to this, as this approach is relatively new and requires some

clarification. Unlike the otherwise very important microenterprise and microfinance programming mentioned above, it provides *security* of access to paid work. The argument for EGPs, philosophically, mirrors that of unemployment benefits. Those who are in “regular” formal employment face the vulnerability of insufficient incomes due to the risk of potential job loss and unemployment benefits for a predictable period of time (3 to 6 months on average); EGPs guard against such insecurity. Other segments of the population face the opposite risk: For those exposed to extremely high risks of “no paid-job offer at all” or underemployment, access to an employment security benefit for a *predictable* amount of time (3 to 4 months annually) is a good step toward a platform that provides SP for all.

EGPs are, at the most basic level, SP initiatives that offer a minimum (low) wage job to those ready and willing but unable to find paid work. In that, this instrument provides the security of a work entitlement when all else fails, and this is why it is referred as to “employment of last resort.” In other words, EGP is an active labor market policy for high-risk groups who are vulnerable to lack of paid work opportunities.

Countries have introduced such initiatives for diverse reasons and for different lengths of time: in times of economic crises (i.e., China and the USA during 2008, Argentina in 2002, Korea in 1997, etc.); to redress alarming levels of urban youth unemployment (El Salvador); to reduce vulnerability and distress migration of rural agricultural workers during the slow agricultural seasons (India), or to prevent distress sale of small assets and livestock of small landholders (Ethiopia); to partially respond to protracted structural unemployment as in South Africa, where deeply structural social and economic reasons have excluded for over a decade and a half about 25–40 percent of the population from access to any work opportunities altogether. This instrument can serve as risk mitigation for other vulnerable groups, as shortages of jobs are also a problem for own-account workers, those in self-employment, and those in microenterprises. They, too, depend on diversification of sources of income, as their earnings from employment and sales are highly volatile and, in general, suffer from underemployment and unpredictable spells of no employment at all. What needs to be kept in mind is that EGPs are “demand-driven” instruments; they are ready to be activated upon the needs and demand for paid work by beneficiaries themselves, much like unemployment benefits.

EGPs involve a noncontributory transfer of income in the form of (low) wages. Labor is hired in for a specific numbers of days (i.e., a total of 100 days) in work-projects that produce public “asset value”: rural land development, flood control works, access roads and water ponds

in villages, reforestation, environmental cleanup, construction of new roads, maintenance of public structures, for example. *If* designed properly, the benefits for communities are found to be multiple and, depending on the specifics of project selection, they can result in better quality of life, enhanced productivity, and expanded livelihood options that can revitalize local community economies (i.e., creation of small cooperatives and the birth of microenterprises).

Two country experiences deserve special mentioning. The first is the National Rural Employment Guarantee Act (NREGA) in India, which is a *permanent* public work creation program. Introduced to generate employment for members of poor rural households during the agricultural off-season, NREGA in 2005 was voted in as an amendment to the constitution of India, making the state the guarantor of the “right to work.” It provides 100 days of work per year to households located in any of the poor rural districts throughout the country. Work projects so far have been selected with the explicit aim to improve rural infrastructure, increase agricultural productivity, and enhance livelihood options. This is a unique initiative in many regards, including the simultaneous passage of the Right to Information Act, which serves to enhance civil society’s oversight of transparency and accountability in monitoring of the program. The program by now reaches over 50 million households, at a cost of about 1.2 percent of GDP.

The second, the Expanded Public Works Program (EPWP) in South Africa—though much smaller in population coverage—is also not a temporary initiative. Instead, it has a medium- to long-term horizon, and is a labor market policy program. Introduced in 2004 with a five-year target to create a million work opportunities, the program is now in its second phase, aiming to double that target. To alleviate the extraordinary problem of chronic and structural unemployment that has averaged about 25–30 percent in the post-apartheid era, the mandate of EPWP was to utilize public sector budgets to provide short- to medium-term employment opportunities to unskilled, unemployed workers from poor and ultra-poor households. The program remained relatively small during its first phase, but is currently in its second phase which has been scaling-up its ambition to create 2 million additional full-time jobs. As compared to other similar international programs, EPWP is quite innovative in that it provides work opportunities not only in infrastructure, but also in the social sectors of the economy—of particular importance for gender equality, which is the issue we turn to.

A note of clarification: There exists some confusion between previously implemented “social funds” and small pilot initiatives and EGPs. The difficulties with previous such

experiences—especially during structural adjustment—were multiple: On the one hand, they were haphazardly introduced, short lived, and had limited population coverage. In that, they were “project” oriented, introduced not as “demand driven” initiatives but through misplaced, at times, population selection and “targeting” criteria, which is the second difficulty. EGPs are fundamentally designed to expand livelihood options, not to be a substitute to them. As such, they are not best suited to respond to vulnerabilities and risks that arise due to elimination of community-based rights to, for example, water resources and associated crop yield reduction (i.e., depletion of water resources due to large-scale commercial use) or natural resource use and management (i.e., of forests and forest products); neither to fend off against unfair competition that domestic cash crops encounter by highly subsidized production abroad nor the elimination of programs of previously subsidized seeds and fertilizers. Beneficiaries in these instances are not willingly and most likely not happily availing themselves to a job offer. They accept participation in “cash-for-work” or “food-for-work” out of distress, which probably accounts for a second mistake in the literature, which on occasion has categorized EGPs as “conditional cash transfer” programs.

3.3.3. *Gender Equality, Women’s Empowerment, and EGPs*

By creating job opportunities, EGPs also deliver income protection—wages—for all participants, and hence for women. As such, it represents a *productive* SP instrument and recognizes women in their *ability to participate in paid work*. Whether it promotes equality and empowerment for women is an open question. Much insight can be gained by addressing two key issues: (1) how women are ensured to have access to EGP jobs and under what conditions, and (2) the degree to which selected work projects benefit them.¹⁴

Much like women’s participation in the labor market, women are bound to face inequality patterns in public works programs (PWPs) and EGPs, including long standing biases. Entry barriers, job assignment segregation, and other asymmetries women face can be remediated at the design phase. For the most part, PWP and EGP job opportunities have typically been created in construction and maintenance of physical infrastructural assets. From a practical and, therefore, policy point of view, four aspects deserve special mention.

¹⁴ This section draws heavily from previous work (Antonopoulos 2010).

First, women's equitable access to jobs is predicated, on addressing the gender-differentiated supply of labor constraints. Unlike men, women's world of work includes the dedication of a considerable amount of their time to unpaid care work. These tasks include not only household maintenance, sanitation, and food preparation, but also—especially among poor households—collection and transportation of free goods, fuel wood, and water. Their time and space for participation in remunerable work activities, therefore, is constrained to begin with. India's NREGA provides an excellent example in this regard. It mandates that: (1) in all NREGA worksites, task some workers with providing and maintaining crèche, shade, and water for children; (2) time-off is made available for lactating mothers to feed young children; and (3) work projects are within a relatively short distance from women's dwellings with a maximum asset at 5 km. But anecdotal evidence suggests that childcare facilities are not always available and, as a consequence, girl-children's time is being severely strained. This is a very important concern: The ability to enforce rules need to be as good as the rules themselves.

Second, the gendered nature of work assignments may exclude women from some jobs. Construction jobs in infrastructure have traditionally been carried out by men. Responding to this challenge, some PWP and EGP have explicitly included targets for women. For example, during the first phase of EPWP in South Africa, the overall participation target per annum mandated that 55 percent of workers be women, and in India, NREGA mandates a 33 percent participation rate for women.¹⁵ There exists immense variation across programs, yet the existing evidence shows women overwhelmingly wanting to enroll in EG infrastructure projects (Devereux and Solomon 2006) and participation rates in some states in India, such as Rajasthan, are as high as 90 percent.

Third, another critical issue is the underrepresentation of women in semi-skilled categories of public works and their low participation rates as subcontractors and supervisors of projects. In some cases, the shortfalls may be an extension of normative labor practices prevailing in the rest of the economy. Proper assessment of skills can go a long way, but when appropriate training is warranted, it must be made part and parcel of PWP and EGP initiatives. A good example in this regard comes from Peru, where the rural Roads Maintenance program (2003–06) increased female participation from 3.5 to 24 percent by setting a female

¹⁵ EPWP South Africa, influenced by the national labor standards set by the Code of Good Practice, targets also mandates that at least 40 percent of workers are youth and 3 percent of workers are disabled, to be scaled up over time.

participation quota of 10 percent in microenterprises, combined with a gender training program addressed to the different actors and levels of the project. Improved participation in decision-making roles in 284 microenterprises was directly linked to targeted training. The program also found that women could undertake all maintenance activities and had better performance than men in activities like surface presentation, forestry, signalization, and control of tasks (Gutiérrez María 2005).

Skill-enhancing services, adapted to local needs and conditions, can be often leveraged from within local and national government processes and budgetary allocations already in place. From the very beginning, EPWP in South Africa introduced a skill-upgrading component, allocating one day per week for this purpose, resulting in proper accreditation and certification by local authorities. For that, what is needed is coordination across departments (labor and education).

Fourth, equitable wages and equal pay for comparable work must be safeguarded. Again, the need to address gender-based inequities in wages is based on the fear that such programs are likely to mirror practices and outcomes that prevail in the overall economy. By setting identical wage “floors” for men and women, PWPs and EGPs can effectively lead by example. Designing and organizing work projects in ways that enable women workers to secure decent work conditions and equal pay for comparable work is within reach.¹⁶ NREGA, for example, has introduced stipulations requiring women to be paid equal wages. In some cases, maintaining fairness in compensation has been based on time-motion studies. The cost of such studies is minimal and, if properly designed, they ensure that compensation is informed by gender- and age-sensitive productivity norms. The jobs from NREGA often have better pay than other work: Women received the identical amount as men, 85 rupees per day as compared to 47 to 58 rupees they would have received in unskilled agricultural and other casual labor (Nayak and Khera 2009).

Work for pay is important for survival but also, as it has been argued all along, it carries value as a signifier of recognition of the autonomous *social* value of one’s labor.¹⁷ Autonomy

¹⁶ ILO’s international labor standards provide guidance in regards to the issues involved in wages equality. Three ILO conventions to pay particular attention to are the C.100, Equal Remuneration Convention of 1951; the C. 111, Discrimination (Employment and Occupation) Convention of 1958; and C. 156, Workers with Family Responsibilities Convention of 1958.

¹⁷ In that, its value does not rest in the “nature” of women’s duty, love, or obligation for family. Instead, by being remunerated, its value rests in its income earning ability. Of course, being engaged in work tasks out of love carries many rewards for both the provider and the receiver. But the fact that it is women who disproportionately perform

and empowerment do not materialize automatically though, simply because paid work becomes available. Transformation is a complex process. Direct involvement of women workers themselves regarding their work assignment choices and direct receipt of remuneration through biofeedback cards, instead of being handled by other “supervisory” household members (fathers, husbands, and mothers-in-law) is important. Given the unequal power relations in households, when women are directly involved in these processes on an autonomous basis, their “positioning” shifts: in their own eyes, in their families, and in the community.

3.3.4. *Ensuring Selected Projects to Reduce Women’s Unpaid Work*

In creating jobs, a main concern of PWPs and EGPs is that public funds are invested in work projects that are socially useful. As many developing countries experience backlogs in basic physical infrastructure, PWP and EGP programs have traditionally focused on closing such gaps, mostly through the use of labor-intensive production methods.¹⁸ Yet, there is space to enlarge the scope of employment-intensive works undertaken. In that, awareness of gender-differentiated priorities can indeed provide guidance and insights to the implementing agencies. Project selection that bridges backlogs in social service delivery benefits community life but also narrows gender-based inequalities in unpaid work. But, in addition, physical infrastructure projects can be leveraged and prioritized with the aim to contribute to reduction in unpaid work. We start with some examples of the latter and then discuss experiences that allow for enlarged PW options that encompass direct service delivery.

Physical infrastructure improve women’s lives by reducing drudgery and their time-taxing burdens in performing tasks related to sanitation, water and firewood collection, daily maintenance of living quarters, accessing free goods from public lands, cooking, etc., such as:

- Construction of more durable housing (Argentina) and ecological latrines (South Africa)
- Construction of small bridges, feeder roads, and paving of internal roads (India)
- Construction of water-harvesting structures and improving traditional structures (India)
- Regeneration of common lands, planting, and reforestation (Ethiopia)

most of the unpaid work tasks that sustain families “naturalizes” this work, and at the end, renders it invisible, expected as a “woman’s work.”

¹⁸ This is a field the International Labour Organization has been instrumental in. Providing technical support, projects use the minimum amount of machines, thus maximizing the labor content of production. ILO has advocated use of such production methods for decades and several countries have undertaken their implementation—primarily in Africa, but also in Asia and Latin America. See: “Employment Intensive Investment Program, ILO.” <http://www.ilo.org/public/english/employment/recon/eip/about/index.htm>, last accessed August 11, 2011.

- Organizing the collection and distribution of water and firewood (India)
- Construction of public-use ovens for meal preparation (Argentina)
- Waste land development; watershed development (Ethiopia and India)

Social infrastructure is an integral part of social inclusion and human development, and it must be developed in conjunction with physical infrastructure. This requires job creation in both sectors. In this regard, there are plenty of “hidden vacancies” waiting to be filled (Antonopoulos 2007). In many ways, they remain hidden because unpaid care is considered a “natural” part of what women do for their households. Important activities as they may be, they remain embedded in the secluded spaces of personal-familial benefits, but unrecognized and undervalued socially.

For our purposes, such hidden vacancies can be identified in areas such as early childhood development, after-school programs, home-based care, and assistance to the elderly and to people with disabilities, and turned into paying jobs for a cadre of PWP and EGP workers. The complementarity of bridging gaps in physical and social infrastructure becomes transparent with a simple example. Encouraging educational attainment requires a suitable physical space for schooling. Yet, school attendance will fail if girls are required to help their families in taking care of the chronically ill at home, as is often the case in households with people living with HIV/AIDS in many parts of the world and in Sub-Saharan Africa in particular. There is compelling evidence that in underserved communities, deficits in income and public services are compensated for by long hours of women’s unpaid work.

There are examples that can provide information on best practices in gender-informed design of public works, including work presented in a recent seminar organized under the auspices of UNDP.¹⁹ South Africa’s Social Sector projects, which are a part of the overall EPWP, provide a distinct example of gender awareness: Early Childhood Development and Community and Home Based Care were identified since the program’s inception as appropriate fields for job creation. In its current phase, phase two, the “Community Work Program” stands as an extension of Social Sector’s phase one, but adds immense value in that it takes a comprehensive community-needs approach. Following a comprehensive assessment of local needs, public service job creation includes community policing patrols, garbage recycling,

¹⁹ Webcast, audio, and all documents are available at Levy Economics Institute of Bard College <http://www.levy.org/pubs/UNDP-Levy/EGS.html>, last accessed August 11, 2011.

teacher aides, sports facilitation, home repairs, and cleaning and maintenance work for households headed by older people and those unable to do so.

Last, but not least, the argument for social sector PWP and EGP works can also be made from an efficiency standpoint. When public job creation takes place *on a large scale*, whether through physical or social sector projects, their impact reaches the entire economy through two channels. To begin with, income earned by PW workers is income spent back in the economy. Secondly, each PW project requires use of PW beneficiary labor as well as other types of labor and physical inputs. When these are demanded and bought for use in PW projects, new demand is injected in the overall system and income is now received by workers and owners of small, medium, and at times large enterprises. They in turn will also demand new goods and services and so on. The positive “multiplier” reverberations show up at the macroeconomic level as growth in employment, output, and ultimately in tax revenues at the province, state, and national levels. Research findings derived through models that link PW’s impact on the overall economy and on individual households show that the impacts on new job creation, new income, and the pro-poor distribution of that income, are stronger when investments are allocated in social services projects than in physical infrastructure. These results have also been verified for the case of developed countries (Antonopoulos et al. 2010; Simonazzi 2009; Warner and Liu 2006).

Though not the only project selection criterion, investing in PWP and EGP *social care* projects delivers multiple policy objectives: while expanding services, it maximizes job growth, distributes newly created income fairly, and promotes gender equality through social co-sharing of care work responsibilities.

4. CONCLUDING REMARKS

Many countries have already embarked on the path the Social Protection Platform initiative envisions: a progressive and gradual expansion of domestic systems with the aim to provide coverage for all. In that, there is wide-spread recognition of the crucial role of adaptation given that initial domestic conditions, funding and institutional capacities, and key national developmental objectives vary. In adopting a gender-equitable perspective, there are important country experiences and South-South cooperation can provide a platform for learning and custom-tailoring diverse instruments according to domestic needs.

A call for avoiding a “one size fits all” approach that resists external expectations and

pressures, which have at times driven style and substance of the instruments of social protection, is being clearly voiced. Valuable lessons that build on gender equality and promote women's empowerment, including those of sophisticated evaluations, deserve to be considered and debated by a wide range of stakeholders. Care must particularly be taken so that home grown agendas embrace the very voices of women who are meant, after all, to benefit from the renewed energy and resources a wider SP agenda proposes.

Most SP initiatives so far do not have clearly stated objectives that address gender risks, nor are they focused on transforming gender inequality relations. Yet, there are powerful exceptions and lessons learned from country-level SP initiatives both in terms of variety of instruments and design elements that provide very useful insights.

There is overwhelming agreement that SP policy is critical in addressing both “life-cycle risks” and “livelihood risks” and that gradually more comprehensive systems are going to be introduced across the world. The issue is how to arrive at a proper combination of instruments that achieve that, and from a gender equality perspective. A useful approach begins with the recognition that gender-informed SP interventions have the potential to nurture *transformative processes* that can contribute to women's empowerment objectives

Life-cycle risks for children, and girls in particular, must address their nutritional, educational, and health risks, and for that a variety of instruments are available with *conditional cash transfers* delivering strong outcomes. The challenge of CCTs from a gender perspective is that in many instances it is presumed to be an intervention that addresses not only children's needs but also women's needs—simply because the cash stipend is received by mothers. Design issues of CCTs must address this concern.

For older age women, undoubtedly old age social pensions are the appropriate vehicle especially when accompanied by in-kind free access to health care benefits. When they care for orphaned children, early childhood development services, free access to medical care, and social pension cash-transfers are necessary instruments that avert extreme hardship and deprivations.

For working-age women, a basic life-cycle risk they face is in the realm of securing a livelihood, which is compounded by reproductive responsibilities. Women in poverty work long hours and contribute to the well-being of their families and communities, but often face multiple inequalities; part of the work they perform is “invisible,” as it is unpaid and presumed to be their duty. This should not be an excuse for social policy “misreading” of women: their social role as *producers* must be fully recognized as their predominant identifier. If motherhood is to be

celebrated, early childhood development centers, childcare, and other interventions that enable women to be equal partners within and beyond the bounds of their homes must be considered as a part of inclusive growth strategies and Social Protection for all agendas.

Responding to income insecurity risks and vulnerability, *employment guarantee programs* have emerged as an instrument that can expand livelihood options. For women, it can serve many purposes. It can provide *protection* in that it transfers income; it can *promote* livelihood options in that they are hired as workers; and it can be *transformative* in that it validates their role as contributing to family income through *earned wages* while receiving equal wages for equal work. The challenge for EGPs is to ensure that unpaid work burdens of participating women are reduced. If EGP design ignores the differentiated social roles and responsibilities of men, women, and children in household production activities, they are certain to put pressure on children's time or result in "triple" days for women in poverty. There is evidence that a combination of the two is taking place already and this, if left unattended, would be of grave concern.

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