

# Welfare and Redistributive Effects of Social Assistance in the Global South

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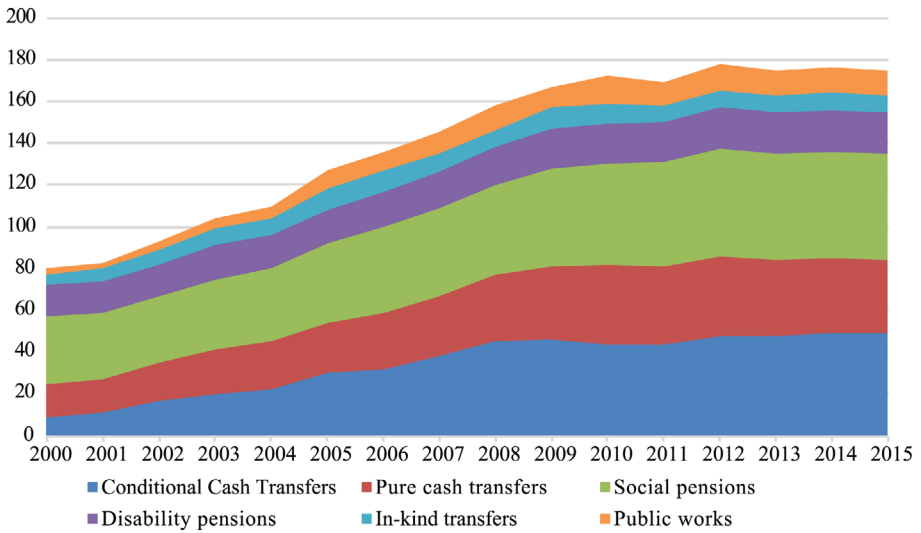
## Introduction

OVER THE PAST TWO DECADES, social assistance emerged as a new paradigm in the fight against poverty and vulnerability in the Global South. It expanded rapidly since the turn of the century, from no more than 80 programs in the year 2000 to about 180 programs currently operating in 130 low- and middle-income countries (Figure 1). With a global reach estimated to be nearly 900 million people worldwide (Barrientos and Niño-Zarazúa 2011), this makes social assistance one of the most important antipoverty policy instruments at the present time.

Social assistance includes tax-financed and donor-funded social welfare programs that are designed to provide income and/or in-kind support to people living in poverty or in situations of vulnerability. Conditional Cash Transfer (CCTs) programs such as Brazil's *Bolsa Família* and Mexico's *Progresa-Oportunidades-Prospera*; social pensions such as South Africa's Old-Age Pension and India's Indira Gandhi National Old Age Pension Scheme; pure cash transfers such as China's (Urban and Rural) DiBao and South Africa's Child Support Grant; and public works and employment guarantee schemes such as Ethiopia's Productive Safety Net Program and India's National Rural Employment Guarantee Scheme are prominent examples of this wave of social assistance in the Global South.<sup>1</sup>

The rise of social assistance reflects important shifts in antipoverty policy design, moving away from food aid and fuel and commodity subsidies toward the implementation of regular and predictable forms of targeted support. These policies emerged in contexts where the distribution of social insurance benefits had remained limited, partly due to the structure of the labor markets in most developing nations. This is often characterized by high levels of informality and a large role for subsistence agriculture in livelihood strategies—particularly in low and lower middle-income countries.<sup>2</sup>

Indeed, contributory old-age and disability pensions, health insurance schemes, occupational injuries benefits, and other contributory schemes that constitute social insurance systems, cover just a fraction of the poorest

**FIGURE 1** Number of social assistance programs by type

SOURCE: Author's calculations, based on Social Assistance, Politics, and Institutions (SAPI) database (UNU-WIDER 2018).

households. In sub-Saharan Africa, for instance, just about 5 percent of population at the first quintile of the income distribution receives social insurance benefits, and this percentage remains low in the Middle East and North Africa (5 percent), Latin America (8.5 percent), South Asia (20 percent), East Asia and Pacific (21 percent), and particularly so among low-income countries (1.6 percent) (Table 1).

The new wave of social assistance has been characterized by what, following Esping-Andersen's (1990) terminology, I refer to as a "partial de-commodification" in the production of social welfare. Partial de-commodification in the sense that despite the observed dynamism and growth of social assistance, the level of social welfare benefits remains limited and they consist of a restricted number of entitlements that, while supporting the poor, do not guarantee a minimum standard of living.

Indeed, the average transfer amount of social welfare benefits going to the poorest households vary significantly, from about US\$0.93 per capita per day at purchasing power parity in Europe and Central Asia to just about US\$0.42 and US\$0.11 in sub-Saharan Africa and South Asia, respectively (Table 1). There is considerable heterogeneity in the generosity of entitlements by type of programs, as shown in Table 2, with social pensions providing, on average, the most generous benefits at the lowest quintile of the income distribution in East Asia and the Pacific, Europe and Central Asia, Latin America, and sub-Saharan Africa. These levels of benefits are, however, just a small fraction of the amount of welfare benefits that the richest households receive, reflecting high inequalities and a complex

**TABLE 1 Coverage and transfer size of social assistance and social insurance by deciles**

Coverage <sup>a</sup>	Social assistance					Social insurance				
	1st quintile (poorest)	2nd quintile	3rd quintile	4th quintile	5th quintile (richest)	1st quintile (poorest)	2nd quintile	3rd quintile	4th quintile	5th quintile (richest)
East Asia and Pacific	65.93	52.78	39.90	30.97	28.46	21.38	22.84	26.40	33.61	38.74
Europe and Central Asia	46.70	38.78	40.19	48.82	50.66	37.56	43.93	49.05	54.59	49.73
Latin America and Caribbean	62.24	50.46	38.50	25.00	11.53	8.60	21.86	28.15	35.75	37.52
Middle East and North Africa	56.98	56.06	57.02	56.10	48.10	5.00	9.72	13.70	17.81	24.32
South Asia	84.82	75.65	71.17	69.08	70.58	20.16	16.68	13.67	11.85	9.32
Sub-Saharan Africa	11.65	13.98	17.04	17.78	19.45	5.00	2.98	2.93	3.57	5.66
High income	66.22	50.90	45.38	35.39	21.69	34.79	40.20	42.70	44.19	36.47
Upper middle income	65.89	52.21	39.76	32.83	34.43	26.14	28.53	32.59	39.74	44.40
Lower middle income	56.75	65.45	62.00	56.25	43.88	14.18	13.32	11.40	10.65	14.86
Low income	12.72	17.55	21.96	18.81	14.16	1.66	0.96	1.38	2.37	4.96
World	50.17	59.69	54.08	42.93	33.98	12.17	14.65	16.75	24.65	38.02
Transfer size <sup>b</sup>										
East Asia and Pacific	0.22	0.23	0.24	0.26	0.30	0.61	1.47	3.57	6.33	12.25
Europe and Central Asia	0.93	1.08	1.38	2.27	2.64	3.08	5.16	7.21	9.90	13.28
Latin America and Caribbean	0.63	0.81	0.97	1.64	1.57	1.85	3.11	4.16	7.29	17.58
Middle East and North Africa	0.16	0.20	0.24	0.27	0.54	1.09	1.36	1.69	2.28	4.45
South Asia	0.11	0.12	0.15	0.19	0.27	0.12	0.14	0.20	0.32	0.91
Sub-Saharan Africa	0.42	0.64	0.86	1.06	1.79	0.22	0.48	0.64	1.14	4.61
High income	1.32	1.21	1.01	1.10	2.39	4.79	7.39	10.52	13.96	22.14
Upper middle income	0.34	0.37	0.45	0.67	1.61	0.79	2.55	4.92	7.89	13.18
Lower middle income	0.14	0.18	0.22	0.29	0.55	0.13	0.16	0.29	0.65	3.08
Low income	0.11	0.24	0.18	0.29	0.97	0.12	0.20	0.40	0.52	1.07

<sup>a</sup>Coverage measures the percentage of population participating, directly or indirectly, in social assistance and social insurance programs.

<sup>b</sup>Transfer size measures the average transfer amount of social assistance or social insurance programs among beneficiaries in daily per capita US dollars adjusted by purchasing power parity (PPP).

SOURCE: Author's calculations, based on World Bank (2019a).



configuration of social protection systems that continue to rely on markets, and families in particular, to provide protection to the poor and vulnerable (Gough 2004; Wood and Gough 2006).

## Demographic transitions and social assistance

An important empirical observation surrounding the recent evolution of social assistance is that it has taken place against the backdrop of important demographic transitions. Over the past several decades, these transitions resulted in major advances in health sciences and public health innovations that helped developing countries improve child survival and life expectancy at birth (McMichael et al. 2004; Gerland et al. 2014). This incidentally has put pressure on limited and fragile social protection systems to simultaneously respond to the needs of families with children and a growing aging population (Christensen et al. 2009; Cohen 2003). Indeed, as one can see in Figure 1, the largest expansion of social assistance was observed in the area of pure cash transfers—such as family and orphan allowances, social pensions, and CCTs—which by design target families with children and the elderly population.

In Southern and Eastern Africa, which has more than half of the world's population of people living with HIV (20.6 million), the expansion of social pensions and family and orphan allowances has been shaped by the need to respond to the catastrophic effects of the HIV pandemic (UNAIDS 2019; Niño-Zarazúa et al. 2012; Budlender and Lund 2011). Social pensions and family and orphan allowances provide income support to vulnerable groups without inherent conditionalities, based on age and principles of citizenship. However, eligibility remains constrained by poverty targeting and is made available through means tests or proxy means tests (Case and Deaton 1998; Barrientos, Gorman et al. 2003).

Although paradigmatic programs such as South Africa's Old Age Pension and the Child Support Grant are large in scale, similar type of programs remain small, covering just a fraction of the poorest households in sub-Saharan Africa. In other parts of the world, social pensions have become integral part of national social protection systems<sup>3</sup>; however, in most cases, they remain limited, covering just about 1 percent of the world's poorest population (Table 2).

Pure cash transfers have been a favored modality for the distribution of social welfare benefits in Europe and Central Asia, East Asia and the Pacific, as well as in the Middle East and North Africa (MENA) region, with coverage rates in the order of 32.5, 20, and 6 percent of poorest households, respectively. Notable examples of these programs include China's (rural and urban) Dibao program, Vietnam's Child Benefits program, Thailand's Child Support Grant, Tunisia's National Programme of Assistance to Needy Families, Palestinian National Cash Transfer Programme.

In Latin America, the rise of social assistance has been dominated by CCTs, which adopt a multidimensional approach to poverty. They link cash transfers to simultaneous interventions in health, education, and nutrition, placing a strong emphasis on tackling the intergenerational transmission channels of poverty via human capital investment.<sup>4</sup> They require households to send children to school and attend periodic health check-ups in exchange for income that supports household expenditures on food, education, and health care. The explicit conditionalities of cash transfers act in this context as an incentive device, influencing parents' investment decisions in their children by mitigating the opportunity costs of schooling, especially at certain critical school–labor market transitions (Parker, Rubalcava, and Teruel 2007).

Prominent CCTs such as Brazil's *Bolsa Família*, Mexico's *Progres-Oportunidades-Prospera* and Colombia's *Familias en Acción* currently cover about one-fourth of the entire populations of these countries, and in Latin America as a whole, CCTs support over 40 percent of the poorest populations. In other parts of the Global South, including in East Asia, South Asia, and the Middle East and North Africa, CCTs have also been introduced although at a much lower scale (Table 2).

More recently, there has been a gradual shift in middle-income countries, particularly in Latin America, toward the inclusion of noncontributory social health insurance schemes as part of social protection systems, with the aim of expanding access to health services while reducing the catastrophic effects that out-of-pocket health expenses and risk-coping strategies can have on the poor (Gertler and Gruber 2002; Mohanan 2013; Wagstaff 2007). Prominent examples of these social health protection systems are Chile's Social Health Insurance program, Mexico's *Seguro Popular*, and Brazil's *Sistema Único de Saúde*. Social health insurance schemes have emerged in a period of a rapid epidemiologic transitions and the growing threat of noncommunicable diseases, such as cancer, cardiovascular diseases, diabetes, and respiratory diseases that are the result of changes in habits, lifestyles, and a deterioration in the environment in which a growing population live—particularly in urban conglomerations (Terzic and Waldman 2011). Current estimates indicate that over 80 percent of deaths related to diabetes and cardiovascular diseases, 90 percent of deaths caused by respiratory diseases, and nearly 70 percent of cancer-related fatalities occur in developing countries (Fuster, Kelly, and Vedanthan 2011), and these figures are likely to deteriorate over the next few decades without active preventive and curative health policy strategies (Mathers and Loncar 2006). It is against this backdrop of public health threats that the provision of comprehensive health care has become a matter of strategic priority for developing countries.

Despite the positive externalities that a broader and more inclusive provision of health care can generate, irrespective of the desirable

reductions in health inequalities (Wagstaff 2002; Woodward and Kawachi 2000; Adler, Glymour, and Fielding 2016), there are concerns in the public debate about the unintended consequences that social health insurance can generate in the labor market via distortions in the incentive mechanisms that lead to efficiency losses and informality (Levy and Schady 2013; Conti, Ginja, and Narita 2018). This is a contested area that has been examined in few country cases (Azuara and Marinescu 2013), and which requires further examination in future research work.

In parallel to the epidemiologic transitions that developing countries have witnessed over the past two decades, there has been a rapid urbanization process, particularly in sub-Saharan Africa, East Asia, and South Asia, that has seen more than doubling the proportion of the urban population since the 1960s.<sup>5</sup> The rapid urbanization process in growing market-oriented economies with abundant unskilled labor resources has inevitably put pressure on governments to address unemployment among a large unskilled working population.

It is in these contexts that public works have emerged as an important policy response, particularly in South Asia and in some countries of sub-Saharan Africa, where coverage is reaching nearly one-fourth of the poorest population. Public works provide income support in exchange for labor on projects to build infrastructure, such as rural roads, irrigation systems, and school and health clinic facilities. Income is usually offered at levels below the market wage rate to attract the poor, who self-select into program participation. This is reflected in the small contribution to household income, which in South Asia is, on average, less than one-fifth of a US dollar a day (Table 2). Emblematic examples of public works are India's National Rural Employment Guarantee Scheme (NREGS), the world largest social assistance program, covering over 51 million households, and Ethiopia's Productive Safety Net Programme (PSNP), the largest public works in Africa, providing income support to 7.6 million vulnerable households (UNU-WIDER 2018).

The "productivist" approach of public works appeals to many governments that are concerned about welfare dependency and must persuade a small taxpayer base of the benefits of financing policies that target the poor. Public works are relevant for at least two reasons: first, climate shocks have become more frequent and co-occurrent, leaving millions at the risk of hunger every year (Cottrell et al. 2019; Wheeler and von Braun 2013). Public works in that respect are expected to mitigate the adverse effects of variations in the economic conditions that threaten food security, consumption smoothing, and productive assets among the poor. Second, most developing countries do not have effective countercyclical policy instruments to alleviate the impact of macroeconomic crises, which often affect the poor hardest (Stiglitz 1999; Ocampo 2002; Talvi and Végh 2005).

## Welfare and redistribution in social assistance

One of the most distinctive features of social assistance programs is their focus on poverty. There are normative and political economy justifications for a poverty focus in social assistance. From a normative perspective, the literature on welfare economics has shown that policies that focus on the poorest are welfare-enhancing (Arrow 1951; Rawls 1971; Sen 2011; 1970). This is because under the law of diminishing marginal utility, any transfer of income would produce the greatest marginal increase in utility if it is directed to the worst-off. As Rabin (2000, 1281–92) has put it lucidly “a dollar that helps us avoid poverty is more valuable than a dollar that helps us become very rich.”<sup>6</sup> These normative principles have provided a solid ground for a poverty targeting approach when designing and implementing social assistance programs. In fact, recent evidence shows that under budgetary constraints, poverty targeting performs much better than universal programs in terms of welfare gains, even after accounting for the diminishing effects of imperfect targeting due to exclusion and inclusion errors (Hanna and Olken 2018; Grosh and Leite 2009).

From a political economy perspective, collective views about the causes of poverty have also played an important role in persuading political constituencies and actors to support policy interventions that benefit the “deserving” poor (Barrientos and Neff 2010). In Latin America, for instance, the “conditionalities” attached to the poverty focus of CCTs were introduced to ensure public support in the expansion of these programs (Niño-Zarazúa 2020).

The scaling up of social assistance actually coincided with important democratic transitions that have seen many countries moving toward more competitive electoral systems (de Haan and Sturm 2003). More competitive political systems have also meant that political incentives for the opportunistic incumbent to manipulate spending on social assistance have been salient across the Global South (Block 2002). Thus, rigorous targeting mechanisms have been increasingly adopted to constrain political clientelism, although with limited success (Filipovich, Niño-Zarazúa, and Santillán-Hernández 2018; Rawlings and Rubio 2005; Sewall 2008).

## Growing evidence on the impact of social assistance

The expansion of social assistance has been accompanied by an unprecedented and growing body of evidence examining the causal mechanisms through which social assistance, and its various modalities, impact welfare outcomes, poverty and inequality in the developing world.<sup>7</sup>

The vast majority of studies have focused on first- and second-order effects of social assistance programs, mainly in the short and medium

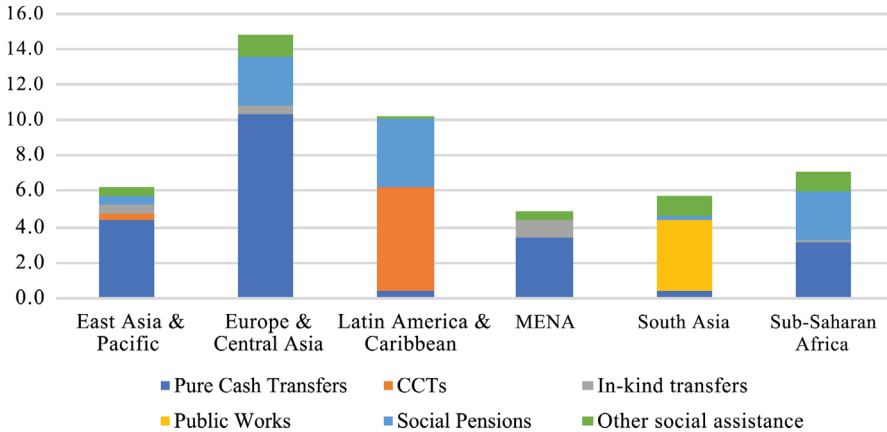


term, and on a wide range of issues including household consumption and poverty (Skoufias and Di Maro 2008; Angelucci and Attanasio 2009; Gertler, Martinez, and Rubio-Codina 2012; Skoufias, Unar, and Gonzalez de Cossio 2013); education and learning (Barrera-Osorio et al. 2011; Benhassine et al. 2015; Baird, McIntosh, and Ozler 2011; Macours, Schady, and Vakis 2012; Filmer and Schady 2011); health care (Fernald, Gertler, and Neufeld 2008; Barham and Maluccio 2009; Attanasio, Oppedisano, and Vera-Hernández 2015; Barber and Gertler 2008; Behrman and Parker 2013); nutrition (Behrman and Hoddinott 2005; Fernald and Hidrobo 2011; Leroy et al. 2008; Miller, Tsoka, and Reichert 2011; Ramírez-Silva et al. 2013), assets protection, and asset accumulation (Covarrubias, Davis, and Winters 2012; Maluccio 2010; Masino and Niño-Zarazúa 2018; Todd, Winters, and Hertz 2010); and employment and labor market outcomes (Asfaw et al. 2014; Barrientos and Villa 2015; Alzúa, Cruces, and Ripani 2013; Ardington, Case, and Hosegood 2009; Attanasio et al. 2010).

Overall, the literature highlights largely positive treatment effects of social assistance on household consumption expenditure and poverty reduction; school enrollment, and attendance—although the evidence on learning outcomes remains ambiguous; health care and anthropometric measures; savings and productive assets such as livestock and agricultural inputs; and in the case of adult labor force participation, and its intensity, studies seems to overwhelmingly reject the proposition that social assistance generates welfare dependency among the poor. The body of evidence; however, varies considerably in terms of the magnitude, direction, and statistical significance of findings across different socioeconomic contexts (Bastagli et al. 2019; Barrientos and Niño-Zarazúa 2010; Malerba and Niño-Zarazúa forthcoming).

Since social assistance programs act as a redistributive mechanism that largely benefits the poor and vulnerable, they are expected to have sizable effects on aggregate welfare including on the poverty incidence and inequality, particularly in contexts where these programs are implemented on national scale (Barrientos 2010; Fiszbein and Schady 2009; Fiszbein, Kanbur, and Yemtsov 2014; Gough et al. 2004). Results of simulation analysis presented in Figures 2 and 3 show that the poverty- and inequality-reducing effects of social assistance vary considerably across world regions, and they largely depend on the design features of programs, their scale, scope, and generosity. In Latin America, for instance, CCTs and social pensions account, respectively, for 6 percent and 4 percent of the poverty headcount reduction at the first quintile of the income distribution, and for 1.3 percent and 0.7 percent of the reduction in the Gini coefficient. In South Asia, public works are the main contributor to poverty (3.8 percent) and inequality (1 percent) reduction, whereas in sub-Saharan Africa, pure cash transfers, such as family and orphan allowances and social pensions, are the main

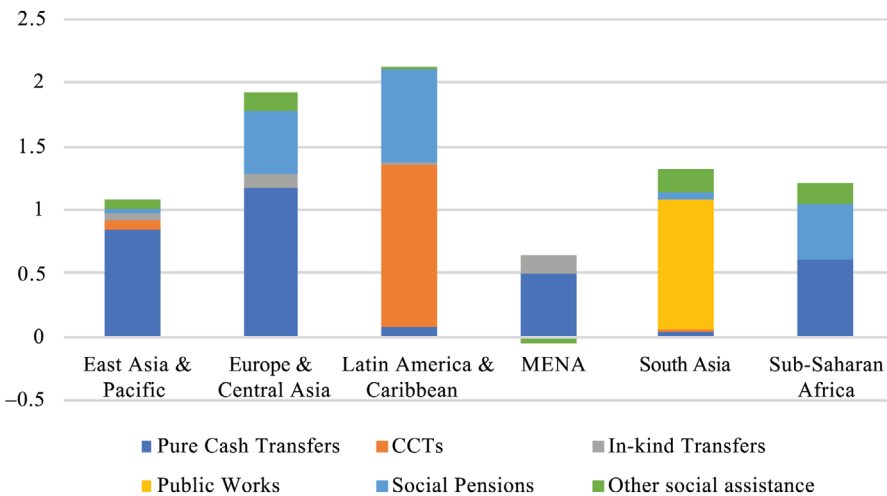
**FIGURE 2 Poverty headcount reduction effects (in percentage) by type of social assistance program**



NOTES: Estimates based on simulated changes in the poverty headcount at the 1st quintile of the income distribution due to social assistance programs. The poverty headcount ratio is measured assuming a pre-transfer welfare distribution.

SOURCE: Author's calculations, based on World Bank (2019a).

**FIGURE 3 Inequality (Gini coefficient) reduction effects by type of social assistance program**



NOTES: Estimates based on simulated percentage changes on the Gini coefficient due to social assistance programs. The Gini coefficient of the population's income distribution is measured assuming a pre-transfer welfare distribution.

SOURCE: Author's calculations, based on World Bank (2019a).

contributors to poverty and inequality reduction among all social assistance programs.

Although current scholarly work and theories have made important strides in advancing our understanding of the first- and second-order effects

of social assistance, there is a smaller knowledge base and less research undertaken on the distributive, and long(er)-term effects of these programs. This is not surprising because of at least two reasons. First, the new wave of social assistance is mostly a recent phenomenon. Even the oldest programs such as Mexico's *Progres-a-Oportunidades-Prospera* and Brazil's *Bolsa Familia* were introduced in the late 1990s and early 2000s, meaning that until very recently, it became feasible to examine their longer term effects.<sup>8</sup> Second, apart from studies conducted mainly in Latin America, most impact analyses have relied on experimental and quasi-experimental research designs that cover the initial phase, often at the pilot stage, of programs (Bastagli et al. 2019; Malerba and Niño-Zarazúa forthcoming). As a result, while the current volume of literature on social assistance continues to grow rapidly, it still faces considerable challenges in terms of external validity and ability to generalize across the heterogeneous populations and diverse socioeconomic contexts in which welfare-benefit programs operate.

Inquiries into how effective social assistance systems have been as a redistributive policy tool, and the extent to which the design features of programs can effectively address the structural roots of poverty and inequality, are widely debated issues in industrialized countries, and are at the core of the current research frontier in the Global South. We have limited knowledge on the redistributive effects of social assistance, especially as between generations, and the potential incentives and distortion mechanisms that these programs can generate in labor markets. Moreover, we know very little about the longer term and gender-specific welfare effects of social assistance, in terms of school and occupational achievements across socioeconomic groups and contexts.

## This collection

The studies that constitute this supplement to *Population and Development Review* came about as result of a UNU-WIDER project "The Economics and Politics of Social Protection" that took an integrated approach to the study of taxation and social protection systems in developing countries. The collection was conceptualized and shaped during discussions in a Symposium organized in Mexico City on February 12–14, 2016, and in the end culminated in eight studies that contribute to the literature on social assistance by addressing some of the vital questions outlined above.

More specifically, the studies by Arza, You, and Niño-Zarazúa; Amaranter and co-authors; and Sari examine redistributive effects of social assistance programs, whereas the studies by Sebastian and co-authors; Canela and Niño-Zarazúa; Neidhöfer and Niño-Zarazúa; and Palacio examine the longer term and gendered welfare effects of social assistance.

Arza examines the recent expansion and dynamics of old-age social pension schemes in 14 Latin American countries and identifies core

program features and policy strategies that affect the effectiveness of these programs. The study highlights two social pension models that have achieved high coverage rates: one characteristic of countries with aging populations and more advanced social security systems and another one characteristic of countries that implemented limited, universal social pension schemes. The study shows that despite the expansion of social pensions in Latin America, these systems remain insufficient in their protection, so the family continues to play a key role in shielding the elderly against both idiosyncratic and systemic risks.

Another study in the collection looks at social pensions and their intersection with the institution of the family, but from a long-term perspective. You and Niño-Zarazúa examine the effects of China's New Rural Pension Scheme on intergenerational transmissions of wealth. They find that, while the social pension has had positive effects on the well-being of the elderly, it also had a detrimental intergenerational redistributive effect, since it has mainly supported better-off families to accumulate wealth while hampering wealth accumulation among the poorest. The authors conclude that in the absence of complementary interventions, the New Rural Pension Scheme is likely to further strengthen intergenerational wealth inequality in China.

The study by Amarante, Colacce, and Tenenbaum also focuses on redistribution in its analysis of the expansion of Uruguay's National Care System, which provides child care services and home-based care for dependent elderly. They find that the redistributive effects of these welfare-benefit programs are limited, partly due to the demographic structure of the country, although the effects would increase with more active female labor force participation. Better child care services for poor children would also increase educational attainment, thus raising future income, which in turn could have an equalizing effect in the long run, although this conditional upon the tax structure.

Education plays a key role in enhancing the welfare effects of social assistance, although this can materialize through intricate channels. The study by Sari in Indonesia looks at the case of decentralization in the provision of educational assistance. She finds that decentralization led to improvements in the quality of education by increasing the provision of educational assistance in marginalized private schools; however, this occurred mainly as an unintended consequence of decentralization. Indeed, decentralization seemed to have facilitated rent-seeking behavior and collusion between village authorities and private schools, which primarily cover the poor school-age population. However, the increased allocation of public resources to private schools led to positive school outcomes among poor pupils, although at the cost of undermining the efficient allocation of public goods.

The literature highlights the crucial part that education plays at securing economic progress and improving income distribution in the medium

and long term (Abdullah, Doucouliagos, and Manning 2015; Gregorio and Lee 2002; Charles and Hurst 2003), although it is often perceived as an unaffordable good by the poor (Banerjee and Duflo 2007). CCTs have been explicitly introduced to address, at least partially, the direct and opportunity costs of schooling and the associated shadow prices of child labor.

The study by Canelas and Niño-Zarazúa investigates the impact of Bolivia's *Bono Juancito Pinto* (BJP), a CCT aimed at improving enrollment, retention, and completion rates of pupils in public schools. The authors provide the first longer term impact estimates of BJP on schooling and child labor decisions. They found evidence that the program increased school enrollment rates but did not change the incidence and intensity of child labor. The results highlight two key issues for policy design. First, sustaining the real value of transfers over time is essential to compensate the opportunity cost of schooling, particularly at critical school-labor market transitions. Second, normative factors and lax legal frameworks that regulate child labor can limit the effectiveness of welfare-benefit programs in the longer term.

Similarly, the study by Neidhöfer and Niño-Zarazúa takes a longer term perspective to examine the impact of *Chile Solidario*—a CCT introduced in Chile with the specific objective of tackling extreme poverty—on educational achievements and labor income of adults who were beneficiaries of the program in childhood. The authors find that individuals who spent their childhood in poverty but received *Chile Solidario* achieved 1.2 more years of schooling and about a 15 percent increase in the average monthly labor income. Although program effects on schooling were similar among women and men in the case of labor income, they were only significant in urban areas and for men and women with no children. This gender dimension seems to indicate that the impact of *Chile Solidario* may be constrained by structural factors that underpin the functioning of labor markets in Chile.

Indeed, gender considerations in the labor market are key to understanding the degree of effectiveness of social assistance programs, especially in societies where patriarchal systems are dominant. Concerns about the roots and consequences of sex-specific preferences in households' investment in children's human capital, and the gender roles that can be reinforced by transfer programs in traditional settings are explicitly analyzed in the studies by Sebastian and co-authors on Lesotho's Child Grants Programme, and Palacio on Ecuador's *Bono de Desarrollo Humano*, respectively.

Sebastian and co-authors investigate gender differences in household child investment behavior arising from participation in the Lesotho Child Grants Programme, a cash transfer program directed to poor households with children. They found that the program had especially positive effects among girls who spend more time at school. As in the Bolivian case, the results also suggest that the cash transfer was insufficient to compensate for the opportunity cost of boys' time in education, given the structure of the rural labor markets in Lesotho. A central policy conclusion from

the analysis is that in order to maximize the potential social impact of the program, it would need to differentiate the level of transfer size according to the perceived cost of schooling by sex and age of the pupils, as it occur in other contexts.<sup>9</sup>

Finally, but not least, the study by Palacio provides an analysis of how program features of Ecuador's *Bono de Desarrollo Humano* may be unintentionally reinforcing traditional gender roles that prevent women from more actively participating in the labor markets. Thus, in contexts in which child care support are limited, CCTs can lead, at best, to women's participation in the informal labor market, which is more "accommodating" to childrearing responsibilities. The findings of the study are relevant as they underscore the need to account for the structure and functioning of labor markets when designing social assistance programs aimed to tackle structural gender inequalities.

### Concluding remarks

Although important strides have been made in the implementation and expansion of social assistance in the Global South, significant policy challenges and knowledge gaps remain. As the studies in this supplement have pointed out, these challenges are linked to aspects of program design, the link between the incentive mechanisms that social assistance and specific policy decisions can generate in school decisions, labor market participation, and other welfare dimensions in the longer term. The findings of these studies indicate that today, social assistance systems not only face the challenge of improving education and health outcomes among children, or protecting vulnerable groups against income shocks, but perhaps more importantly, finding ways to support more transformative and lasting third-order social impacts.

However, this can only be achieved if we improve our understanding of the structures, rules, and social norms that govern markets and institutions in developing countries. As the studies in this collection have convincingly shown, these mediating factors, together with errors in policy design, continue to hamper collective efforts to bring more opportunities to disadvantaged groups including women and children, who are often on the losing-side of antipoverty interventions.

Errors in policy design are normal and can occur regularly, but it is crucial to learn from these mistakes and take decisive actions to fine-tune existing programs and avoid future failures. Research in that context has a fundamental role to play. However, much work is still needed to better understand the long-term welfare and redistributive effects of social assistance and their interplay with labor and insurance markets and tax policies. I trust the studies in this supplement will contribute to the debates around how to improve the effectiveness of social assistance.

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## Notes

1 For a typology, see Barrientos, Niño-Zarazúa, and Maitrot (2010).

2 Informal employment represents about 80–90 percent of total nonagriculture employment in low-income and lower middle-income countries, whereas in lower middle-income and upper middle-income countries, it is in the order of 70–80 percent and 35–60 percent, respectively. Similarly, employment in agriculture, measured as percentage of total employment, remains considerably high, above 60 percent in low-income countries but also in lower middle-income countries (about 40 percent) and upper middle-income countries (about 22 percent) (World Bank 2019b).

3 Relevant cases are India's Indira Gandhi National Old Age Pension Scheme, the Philippines's Social Pension for Indigent Senior Citizens, and Mexico's *70 y Mas* program.

4 In some specific cases, such as *Chile Solidario*, programs combine income support with a wide range of interventions that include health, education, employment, and housing.

5 Although Latin America is the region with the largest urban population in the world (about 80 percent), it is sub-Saharan Africa, East Asia and South Asia that have experienced the fastest growth rate of urban-

ization, from just about 15, 22, and 17 percent of total population living in urban areas in 1960 to about 40, 60, and 34 percent in 2018, respectively (World Bank 2019b).

6 The implicit greater weight given to the income that is channel to the poor also satisfies the Pigou-Dalton Principle, which states that an income transfer from the rich to the poor results in greater equity as long as the transfer does not reverse their position (Dalton 1920).

7 For reviews of the literature on the impact of social assistance programs, see Baird et al. (2013), Barrientos and Niño-Zarazúa (2010), Bastagli et al. (2019), and Malerba and Niño-Zarazúa (forthcoming).

8 A few notable exceptions that have taken a longer term perspective include Araujo, Bosch, and Schady (2018), Baez and Camacho (2011), Barham, Macours, and Maluccio (2013), Behrman, Parker, and Todd (2011), Fernald, Gertler, and Neufeld (2009), Gertler, Martinez, and Rubio-Codina (2012), Hahn et al. (2018), and Handa et al. (2018).

9 In Mexico, for instance, *Progresar Oportunidades-Prospera* program increases the amount of the education grant with school progression, and especially so for girls, with the explicit objective of providing incentives to keep girls at school (Niño-Zarazúa 2020).

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