

**Anti-Poverty Social Policies in Chile and Concerns for Social
Justice in Neo-Liberal Times: A View from Below**

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I, Daniela Giambruno Leal, confirm that the work presented in this thesis is my own. Where information has been derived from other sources, I confirm that this has been indicated in the thesis.

*In memory of my loved father,
Bruno Andres Giambruno Rojas (1949–2019)*

*To my mother who systematically, actively, and generously
accompanied and helped me during all these years...*

ABSTRACT

This research explores and identifies the citizenship implications of the contemporary expansion of social assistance policies in Chile, which emerged under the stratified and highly segregated welfare regime established during the 1980s' "neo-liberal transformation". Notwithstanding the negative impacts produced by neo-liberal reforms on social citizenship and welfare rights identified in both developed and developing countries, little scholarly attention has been given to the implications of the rise of social assistance policies on the citizenship status of the poor in Latin America. This issue is highly relevant considering the conditions of welfare exclusion suffered by people living in poverty under the welfare regimes that prevailed in the region prior to the 1980s. Consequently, this research explores the quality of the welfare inclusion of the poor in order to identify to what extent the expansion of social assistance policies has provided conditions of social recognition of the poor as subjects of rights. In order to do this, it follows a qualitative, case study approach, including interviews with welfare beneficiaries participating in two different anti-poverty programmes, along with professionals engaged in the local implementation of both programmes. These social programmes represent two different lenses through which the lived experiences of two different generations of welfare beneficiaries can be analysed and compared with the aim of identifying the terms and conditions of inclusion prevailing in the welfare field in the country, their impacts in terms of distribution and recognition, and the type of welfare citizenship being experienced and forged among current welfare beneficiaries in Chile.

IMPACT STATEMENT

This research utilises an original sociological approach to investigate the citizenship implications of social assistance policies among low-income groups in Chile, which allows for the exploration of recent theorisations about social recognition in the field of social justice, as well as social policy discussions about contemporary welfare reforms and their implications in matters of social citizenship, poverty and inequality. The research involves a context-specific case study that provides particularly good conditions to develop this type of research, considering the contemporary trajectory of welfare reforms developed in Chile oriented by neo-liberal principles, as well as by the progress achieved in the country in matters of social assistance expansion and institutionalisation. In terms of the methodological approach, the research employs a complex and diverse qualitative case study methodology through which it explores the lived experiences of a group of welfare beneficiaries from two different generations participating in two different social assistance programmes, along with the experiences of welfare professionals engaged in the local implementation of such programmes. This methodological strategy allows for the analysis of the experiences of welfare beneficiaries as part of an unprecedented process of welfare inclusion of the poor developed in Chile and several other Latin American countries during the last decades. The research scrutinises the quality of this welfare inclusion by examining the terms and conditions of inclusion of specific social assistance programmes, as well as the general welfare architecture shaping the magnitude and logic of social assistance in the country. As demonstrated by this research, only through such examinations is it possible to grasp the citizenship implications of the recent expansion of social assistance policies in Chile, and the way in which this has provided conditions of social recognition of the poor as subjects of rights.

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LIST OF ACRONYMS AND ABBREVIATIONS

AUGE	Universal Plan of Explicit Health Guarantees <i>Plan Universal de Garantías Explícitas en Salud</i>
AFPs	Administrators of Pension Funds <i>Administradoras de Fondos de Pensiones</i>
CAS	Socio-Economic Characterization File <i>Ficha de Caracterización Socio-económica</i>
CASEN	National Survey of Socio-Economic Characterization <i>Encuesta Nacional de Caracterización Socio-económica</i>
CCTs	Conditional Cash Transfers Programmes
CEPAL	Economic Commission for Latin America and The Caribbean
CONADI	National Corporation of indigenous Development <i>Corporación Nacional de Desarrollo Indígena</i>
ECEC	Early Childhood Education and Care
FONADIS	Disability's National Fund <i>Fondo Nacional de la Discapacidad</i>
FONASA	National Fund of Health <i>Fondo Nacional de Salud</i>
FOSIS	The Solidarity and Social Investment Fund <i>Fondo de Solidaridad e Inversión Social</i>
ILO	International Labour Organisation
INJUV	The Youth's National Institute <i>Instituto Nacional de la Juventud</i>
ISI	Import Substitution Industrialisation Industrialización por sustitución de Importaciones
IVA	Added Value Tax Impuesto al Valor Agregado
ISAPRE	Health Insurance Institutions <i>Instituciones de Salud Previsional</i>
JUNJI	National Council of Kindergartens <i>Junta Nacional de Jardines Infantiles</i>
MIDEPAN	Ministry of Planning and Cooperation <i>Ministerio de Planificación y Cooperación</i>
MIDES	Ministry of Social Development <i>Ministerio de Desarrollo Social</i>
OECD	Organisation for Economic Co-operation and Development

PNAC	National Programme for Supplemental Nutrition <i>Programa Nacional de Alimentación Complementaria</i>
PEM	Minimum Employment Program <i>Programa de Empleo Mínimo</i>
SAPs	Structural Adjustment Policies
SENAMA	Older Adults' National Service <i>Servicio Nacional del Adulto Mayor</i>
SERNAM	The Woman's National Service <i>Servicio Nacional de la Mujer</i>
SUF	Unique Family Subsidy <i>Subsidio Único Familiar</i>
UN	United Nations

INTRODUCTION

This research concentrates on the contemporary expansion of social assistance policies in Latin America. For most of the 20th century specific policies aimed at the social protection of “the poor” remained residual in the region, which can be explained by both the social insurance model of welfare established across several Latin American countries based on formal labour inclusion, as well as by the structural shortcomings of the economies of the region to provide conditions of formal labour inclusion for the vast majority of the population. The structural adjustment reforms of the 1980s put an end to these “truncated” welfare regimes and replaced them with residual welfare regimes or “subsidiary states”, which emerged in the region under the influence of the neo-liberal doctrine that shaped both economic and social policies. Since then, dual systems of residual public provision and market services have expanded across the region, along with the development of safety-nets targeting “the poor”¹. However, during the 1990s, and particularly from the 2000s onwards, these timid safety nets transformed into large-scale anti-poverty programmes, in many cases under the rubric of conditional cash transfers, providing unprecedented levels of coverage among lower income groups. In countries like Chile, these developments have translated into the building of a more or less established system of social protection, whereby the state provides some minimal guarantees of social inclusion and protection to people in poverty through social assistance programmes and access to non-contributory channels of social security.

In the light of the historical under-development of social assistance policies in the region, the central inquiry of this research is to explore the impacts that the recent welfare inclusion of “the poor” has had on the citizenship status of this group in terms of both social inclusion and recognition. Consequently, the main question to be addressed by this research is: whether and to what extent have social assistance policies contributed to enhancing the citizenship status of “the poor” in Chile? Along with this main research question, two other subsidiary questions are examined: 1) to what extent have social assistance policies helped to provide welfare beneficiaries with better living conditions and opportunities? and 2) to what extent has the expansion of social assistance provision contributed to promote the recognition of the poor

¹ In Spanish “the poor” is translated as “*los pobres*”, an expression that does not only refer to the socio-economic conditions of this group, but also to the symbolic implications associated with the inferior social status enjoyed by this group among Latin American societies. Based on the material and symbolic implications of the term, this thesis will talk about the poor in inverted commas in order to show awareness of the negative connotations associated to this collective category in the specific context of Chile.

as subject of rights? While there is ample evidence about the lack of redistributive impact of current anti-poverty policies in Latin America due to their focus on alleviating poverty rather than addressing the structural factors that produce it, the question about social recognition has remained less attended. There has been much discussion about the cultural and moral implications of these policies for the social standing of lower-income groups; however, much of the discussion has concentrated on the stigmatising treatment received by “the poor” and welfare beneficiaries under neo-liberal policies and reforms in circumstances where liberal welfare regimes in general, and social assistance policies targeting “the poor” in particular, have quite often shown a detrimental treatment of welfare subjects that has placed them as subjects of help but not of rights. In fact, one of the most discussed issues regarding anti-poverty social policies and social assistance, in general, has been their minimal contribution to social citizenship in the light of the different rules of entitlement and administrative treatment applied to those groups depending on social assistance. However, considering the unprecedented expansion of social assistance policies in the region, it is worth asking about the citizenship implications of this development in terms of social inclusion and recognition of “the poor” as subjects of rights, which in turn requires consideration of the terms of inclusion established by these policies, as well as the impacts produced by the selection and participation in welfare programmes on the social standing of welfare beneficiaries.

In order to research these issues, the study focused on the case of Chile, one of the pioneer countries in matters of social security development in the region, which until the mid-1970s had a “social state” characterised by a “stratified universalism”, although with modest social assistance programmes for the poor and informal workers. Chile was also a pioneer in the introduction of drastic neo-liberal reform under a dictatorial regime that involved a complete reconfiguration of its welfare regime through the privatisation of social services and social security, along with the development of residual social services and assistance for groups living in poverty. When the country returned to democracy in 1990, there was significant investment in the welfare field; however, it maintained the dual and residual structure established during the Chilean “neo-liberal transformation”, although it significantly expanded the offer of social assistance and non-contributory social security. This social policy development strengthened during the 2000s when the country began to adopt a social protection approach that sought to provide minimum guarantees of social inclusion and protection of “the poor” and “the vulnerable” from a rights-based approach. As such, considering the contemporary welfare trajectory followed in the country, it is relevant to

research to what extent this recent social policy development has contributed to providing better conditions of inclusion and recognition of the poor as a subject of rights in Chile.

The research followed a qualitative case study approach with the main unit of analysis being the experiences of participation in social assistance programmes of welfare beneficiaries from two different generations. In doing this, the research aimed to explore the “lived experiences of welfare” from a generational perspective in order to identify with more clarity the conditions of inclusion and recognition provided by current social assistance policies in the case of two different groups of welfare beneficiaries – adults of working age, and older adults. As older adults developed their life-trajectories during a period of under-development of social assistance policies, their inclusion in this research helped to distinguish the impacts produced by the current expansion of social assistance policies on the citizenship status of “the poor” in Chilean society. In addition, via the selection of two different anti-poverty programmes targeting adults of working age and older adults, the research was able to compare the conditions of welfare inclusion provided by two different social assistance programmes that although similar in regard to their components, differ in their approach to poverty in accordance with their target populations. Finally, the research included interviews with welfare professionals considered as key informants for this study, who, as a result of their mediating positions in the welfare field, provided valuable insights about the conditions of inclusion and recognition established by the current orientation and implementation of anti-poverty social policies in Chile, as well as beneficiaries’ dispositions in the welfare field. As can be observed, the main social categories included in this research are welfare beneficiaries and professionals. Specifically, on welfare beneficiaries, the main criteria of selection were their socio-economic, gender, and generational status, all features that were relevant for the purposes of this research, as it is going to be explained in the methods section of this thesis. In this sense, this research did not extend to consider the particular experiences of indigenous minorities in Chile, a significant issue whose complexity was not possible to be covered by this study².

² For more details about research on indigenous groups in Chile the reader can review the work of Patricia Richards (2013,2004) focused on democracy, indigenous rights and gender; José Bengoa (2004) centred on the history of indigenous people in Chile; and Rodrigo Valenzuela Fernandez (2004) concentrated on the analysis of inequality, citizenship and indigenous groups.

Apart from this introduction, the rest of the thesis is organised as follows. Part I corresponds to the literature review informing this research, which has been organised in three different chapters. **Chapter I** provides the specification of the “Chilean case”, and the object of inquiry of this research based on the analysis of the welfare trajectory followed in the country since the “neo-liberal transformation” until the establishment of the current system of social protection. **Chapter II** analyses the contemporary welfare inclusion of “the poor” in the region in the light of the welfare architectures in place prior to structural reforms. In addition, it analyses the expansion of social assistance in the region with regard to the residual and segregated welfare regimes that emerged from these structural reforms. Under these conditions, the quality of the recent welfare inclusion of “the poor” is discussed, considering the implications of social assistance policies in terms of citizenship and social recognition. **Chapter III** provides an historical analysis of the welfare architectures developed across Latin American countries, and in particular in Chile, since the 19th century until the 1980s structural reforms in order to identify the factors shaping the conditions of welfare exclusion suffered by “the poor” and informal sectors prior to this period.

The second part of this research is made up of four empirical chapters preceded by a section introducing the methodological approach and design followed by this research. **Chapter IV** analyses the experiences of welfare beneficiaries of working age participating in the first anti-poverty programme selected as a case study of this research, the “Programa Familias” (“Families Programme”). Based on the interviews conducted with 12 female beneficiaries from this programme, the chapter explores and analyses the conditions of inclusion provided by the programme and its implications in terms of social recognition, in the light of its approach towards poverty and how it constructs beneficiaries’ needs. The same analysis is developed in **Chapter V** dedicated to the experiences of 13 older-adult welfare beneficiaries participating in the second anti-poverty programme selected as a case study for this research, the “Programa Vinculos” (“Bonds Programme”). **Chapter VI** analyses the experiences of the group of 25 welfare beneficiaries interviewed for this research in order to explore to what extent they regarded their welfare entitlements as their right, and whether they felt entitled to claim for welfare support. Finally, **Chapter VII** examines the experiences of the group of 25 welfare professionals interviewed for this research in their status as key informants. Through the analysis of professionals’ experiences of implementation of anti-poverty programmes at the local level, the chapter provides a grounded approach towards the terms and rules of incorporation and participation applied to beneficiaries in the welfare field. This final analytical

chapter is followed by a concluding section, which gives an account of the main findings and implications of this research.

PART I

CHAPTER I

The Chilean Case: Neo-liberalism, Social Policy Reform, and the Welfare Inclusion of “the Poor”

Introduction

The purpose of this chapter is to introduce the case study of this research, which corresponds to the citizenship implications of the contemporary expansion of social assistance policies in Chile. The chapter aims to provide the context of the study including analysis of the recent welfare trajectory followed in Chile, particularly in matters of social protection and social assistance; as well as the outcomes associated, specifically in matters of poverty and social inequality. It will then analyse the shortcomings of current social policies in matters of decommodification and redistribution in the context of the “residual” welfare regimes or “subsidiary states” in place in Latin America since the 1980s’ neo-liberal reforms. These shortcomings can be explained by the neglect of social rights encouraged by the neo-liberal doctrine, which in turn has shaped and constrained the contemporary development of social policy in the region. As such, the current expansion of social assistance policies in Latin America constitutes a direct expression of the neo-liberal doctrine, and the liberal welfare regimes settled under its influence, which itself resulted in the diminishing of social citizenship and the neglect of universal social policies. Yet, as argued by this research, the recent expansion of social assistance policies in countries like Chile still has important citizenship implications in terms of social inclusion and recognition, considering how the sectors living in poverty in the region remained traditionally excluded from the formal channels of social protection. As a result, it is mainly under today’s neo-liberal welfare regimes that “the poor” (*los pobres*) are accessing and experiencing a kind of “welfare citizenship” in Latin America – a term that describes how the “universalist” and “ideal” nature of citizenship, and in particular social citizenship, materialises in the context of different capitalist welfare regimes. In the light of this, it is worth considering the quality of the recent welfare inclusion of groups living in poverty in Chile, as well as the citizenship implications associated with this process. Looking beyond decommodification and social distribution, this research considers the effects of this inclusion from the perspective of social recognition, and explores the way in which people’s experiences in the welfare field have contributed to a sense of entitlement among welfare beneficiaries.

1. The “Chilean Neo-liberal Transformation”, Welfare Reform and Poverty

It is not possible to understand the contemporary development of social assistance policies in Chile without making reference to the socio-political and economic conditions that shaped their emergence as well as the subsequent evolution of social policies in the country since 1990 onwards. In 1990 the country returned to democracy after 17 years of military rule and was faced with the urgent task of managing not only the human and political consequences of Augusto Pinochet’s dictatorship (1973–1989) but also the “social costs” of the structural reforms carried out during the authoritarian regime. It is therefore important to consider how, apart from brutal repression, Pinochet’s dictatorship was characterised by the severe retreat of the state in matters of welfare and social development, which led to a drastic fall in public social expenditure, decreasing from 24.8% to 14.3% of GDP between 1971–1981 (Arellano, 1988:45–46; in Silva, 1993:477). According to Arellano (2009/1985), such a decrease in social expenditure was due to both ‘the anti-inflationary policies’ that included the drastic reduction of public expenditure, as well as to ‘the long-term development strategy’ implemented by the military regime that was dependent on the private sector and the reduction of the state to its minimum expression (Arellano, 2009/1985:415). Overall, both trends signalled a ‘radical break’ with the previous model of state-led industrialisation in place in the country since the 1930s until the 1973 military coup, along with the introduction of ‘an orthodox version of the market economy’ (Silva, 1993:475) or what has become known in Chile as “the neo-liberal transformation”.

In the context of Latin America, the term “neo-liberalism” is primarily associated with the ‘economic experiences’ carried out by the south-cone dictatorships during the 1970s and 1980s, and concomitantly with the policies of economic liberalisation promoted by international financial agencies through the so-called “Washington Consensus” at the end of the 1980s (Garretón, 2012:29). The Washington Consensus was a programme of economic adjustment specially designed for developing economies that faced international payment crises (Morandé, 2016), as was the case of several Latin American countries during the 1980s.³ It promoted the adoption of a series of measures of economic restructuring aimed at ‘curbing inflation, decreasing fiscal deficits, liberalizing the economy and privatizing state enterprises’

³ The set of policies defined by the “consensus” were formulated by the British economist John Williamson in 1989, defining a series of measures to be adopted by developing economies in order to be granted loans and financial aid from those multilateral financial organisations placed in Washington such as the IMF and the World Bank (Morandé, 2016).

(Molyneux, 2008:779). Although the neo-liberal transformation carried out in Chile under the military regime led to the adoption of several of the measures recommended by the Washington Consensus, it is important to highlight that the adoption of these policies happened well before, and independent from, the enactment and widespread adoption of the Washington Consensus in the Latin American region during the 1980s. In the case of Chile, the adoption of neo-liberalism as an economic and political doctrine was associated with the so-called “Chicago Boys”,⁴ a group of young Chilean economists from the University of Chicago that developed their studies under the guidance of leading figures such as Milton Friedman, who became the designers and executors of the economic and political strategy followed by the Pinochet dictatorship (Garretón, 2012; Taylor, 2006; Silva, 1993). According to the Chicago Boys, the adoption of neo-liberal policies in Chile was the only answer to the 1973 economic crisis. For some scholars, such policies constituted a “foundational project” (Garretón, 2012) that extended well beyond the economy to include several spheres of social life such as work, health and education – a whole societal transformation that explains why this period of drastic and radical reform is often depicted as the “Chilean neo-liberal transformation”.

As in several other contexts, the opening and liberalisation of the national economy encouraged by the neo-liberal doctrine in Chile led to the application of a series of austerity measures, including the abolition of price controls, the reduction of public bureaucracy, and significant wage deterioration (Silva, 1993; Taylor, 2006). In fact, between 1972 and 1989 the share of wages in the national product declined from 52.2% to 36.7% (Taylor, 2006:77), which can be primarily explained by the high levels of unemployment left by the economic reforms carried out by the military regime, with an unemployment rate of above 20% on average throughout this period (Silva, 1993:477). Perhaps the best way to illustrate the critical socio-economic conditions of the country during the neo-liberal reforms and consequent economic instability is by looking at the poverty levels during this period – 17% of the Chilean population was living in poverty in 1970, by 1976 this figure was 57% (Mesa-Lago, 2008).

⁴ It was a group of economists benefited from a cooperation agreement signed by the University of Chicago with two Chilean Universities (Universidad de Chile and Universidad Católica de Chile) in 1953. As part of this agreement, the group of economists had the opportunity to enrol in the University of Chicago and learn the neo-liberal doctrine by senior figures such as Milton Friedman (1912–2006) and Arnonld Harberger (1924).

However, the social costs of the neo-liberal transformation developed in Chile under the military regime did not stop there. Highly relevant for this research is to consider the complete re-configuration of the welfare regime of the country during this period. Although no Latin American country developed effective and universal welfare systems prior to neo-liberal reforms (Molyneux, 2008), it is important to specify how Chile along with Argentina, Costa Rica and Uruguay are regarded as “pioneer” countries in matters of social security development in the region (Mesa-Lago, 1986). In fact, as a result of this earlier welfare development, this group of countries were able to protect ‘the vast majority of the population’ through social security entitlements, basic health services and access to primary education (Filgueira, 2005:15). According to Filgueira, these Latin American countries were able to develop the most “universal” social states of the region, although they were highly “stratified” in terms of both social security access and population coverage – these unequal welfare conditions were particularly detrimental for the social inclusion and welfare protection of “the poor”. Indeed, as the social security systems that prevailed among these countries were based on formal labour inclusion, a high number of lower-income groups working in conditions of labour informality remained excluded from the institutions of social protection, a critical situation that was worsened by the lack of development of social assistance policies in Latin America prior to the 1980s (Barrientos and Santibañez, 2009) – an issue analysed in much detail in subsequent chapters. For now, it is important to highlight how the progressive trend of welfare development observed in countries like Chile was severely undermined by the neo-liberal reforms of the 1980s as they drastically cut its universalist aspirations, emphasising, in turn, its stratified organisation.

Apart from the reduction of social expenditure impacting negatively on the functioning as well as on the quality of social services, one of the most salient features of welfare reform in Chile was the increasing participation of the private sector and the introduction of market mechanisms in all of the traditional sectors of social policy (Arellano, 2009/1985). As a result of social security reforms, the previous collective schemes of social security (or pay-as-you-go system) was replaced by individual capital accounts managed by private agents (Ruiz, 2013). As a result, and since then, mandatory social security contributions are financed by workers ‘alone rather than through tripartite financing’ (Staab, 2012:308). In order to administrate workers’ social security savings and to make them profitable, new private institutions were created – the so-called “administrators of pension funds” (AFPs) – to which each Chilean worker must affiliate, charging fees for their services. Along with pension reforms, the system of social security of the country was substantially modified as a result of a series

of health reforms that included, for instance, the dismantling of the “emblematic” National Health Service, one of the first welfare institutions developed in the country, into 26 independent health services – a decentralisation process that also saw primary health centres transferred to municipalities (city councils) for their administration (Larrañaga, 2010). Additionally, a uniform health contribution was made mandatory for waged workers and pensioners, who since then must choose between a public health insurance (FONASA) or a private one (ISAPRES). In practice, the introduction of private institutions providing health insurance plans has reinforced not only socio-economic stratification but has also produced a high degree of segmentation in population risks, something particularly detrimental for specific population categories such as women of childbearing age and older adults (Larrañaga, 2010:12).

Another crucial area of welfare reform was the educational sector. As observed in the case of the health sector, the re-configuration of the education system of the country included a process of decentralisation through which the administration of public schools was transferred from central government to local municipalities. In addition, private institutions were incorporated as providers of educational services based on state subsidies (Ruiz and Boccardo, 2015). As a result, demand subsidies were introduced as the new mechanism to finance both public and subsidised-private schools (with co-payment) following families’ school elections (Ruiz and Boccardo, 2015; Larrañaga, 2010). Additionally, the state system to finance universities was reformed into a system of competition between traditional public universities and new private institutions (Arellano, 2009/1985:415–416). Finally, another major area of welfare reform in Chile was the housing sector. In this case, the neo-liberal orientation of housing reforms included measures such as the liberalisation of the land market, and the introduction of demand subsidies as the main mechanism for access to housing (Larrañaga, 2010:13). In the light of these reforms, the building of state housing was replaced by private enterprises that operate either as outsourcing companies for the public sector or as direct service providers for families receiving public financing. Consequently, the housing reforms increased socio-economic stratification among the population as it established two different channels for housing acquisition: first, subsidies for middle-income groups that supplemented families’ resources; and secondly, basic housing programmes for lower-income groups with low saving capacity, placed in marginal areas (Larrañaga, 2010:13).

Overall, the above brief account of the major welfare reforms developed in the context of Chile’s neo-liberal transformation allows us to identify the constitution of a new welfare regime

in the country – namely, a “residual welfare regime” based on targeted public action on lower income groups, and under the logic of individual welfare responsabilisation (Larrañaga, 2010:11). According to this new residual and individualising framework, state welfare support in Chile began to concentrate on those groups that were not able to satisfy ‘essential needs’ by themselves (MIDEPLAN, 1991:9). As has been the case in Latin America, it is important to observe how, in Chile, this residual channel of welfare support that was only for those “in need” was justified by the principle of “state subsidiarity” adopted by the military regime (MIDEPLAN, 1991, Silva, 1993) – a principle in line with the neo-liberal doctrine of ruling out state intervention, justifying it only in those cases when individuals or intermediate organisations were not able to work properly⁵ (MIDEPLAN, 1991:9). In the context of Chile, the constitution of a “state of subsidiarity” (*Estado subsidiario*) was regarded as fundamental to secure other key neo-liberal principles such as “individual freedom” (understood as the individual faculty to choose goods and services in the market, including social services and welfare goods) and “equality of opportunities” (defined as ‘absence of discrimination’, particularly from ‘the arbitrary and discretionary power of public bureaucracies’) (MIDEPLAN, 1991:9). In this regard, and as has been observed in several other contexts where neo-liberal reforms have been carried out, the massive process of economic and welfare reform developed in Chile involved strong attacks on the previous “state interventionism”, in particular that exercised through social policy. In the specific case of Chile, neo-liberals argued, for instance, that the high levels of poverty prevailing in the country during the 1980s were the direct result of previous state policies, which apart from being ineffective were ‘aimed exclusively at beneficiating the parties’ small political clienteles to the detriment of the majority of the population’ (Silva, 1993:476). In line with this view, the diagnosis was ‘that previous social policy had beneficiated middle-income groups more than the extremely poor, leading to the “hypertrophy” of state structures’ (Pozo and Vergara, 1990, in Richards, 1995:519). As such, the shortcomings of the previous welfare regime were used to justify the necessity to replace ‘state discretionary power’ with the ‘impersonal nature of the market’ in order to secure “equality of opportunities” (Silva, 1993:476). Under the neo-liberal doctrine, equality of opportunities requires the guarantee of individual freedom from any discrimination, particularly from state intervention, as well as the capacity ‘to compete under identical rules, so that the outcomes achieved ‘depend entirely on’ individuals’ capacities, efforts and labour (Moulian and Vergara, 1980; in Silva, 1993:476).

⁵ In fact, following Milton Friedman (1975), the principle of subsidiary adopted in Chile established that the role of the state ‘was to be limited to such matters as the defence of private property, the definition of the rules of the game in economic activities, and the protection of free-market competition’ (Friedman, 1975; in Silva, 1993:475).

Consequently, the main role assigned to the state after the Chilean neo-liberal reforms was to 'guarantee "equality of opportunities" to which it was necessary that every household could enjoy some minimal welfare conditions in the spheres of housing, education, health and nutrition' (Richards, 1995:519). When minimal welfare conditions were not satisfied through the market, the state was required to intervene in order to secure their provision, mainly through subsidies (Richards, 1995).

At this point, it is possible to appreciate the magnitude of the neo-liberal transformation carried out in Chile, considering both the scale of economic and welfare reform and the huge social costs produced by the structural transformation. In fact, few palliative measures were taken during the reforms, which, under authoritarian and orthodox neo-liberal conditions, concentrated only on extreme poverty – the section of the population that was not just the most affected by the package of reforms, but also the social category that became the new "target group" of Chilean social policy. This is how since 1980 social policy reappeared in Chile under the form of a new "safety-net" targeted on "the extremely poor", including several social assistance programmes for unemployed people, older adults in poverty, people with disabilities without social security protection, and children and pregnant women from families in extreme poverty.⁶ In this context, children from poor families became a priority group for social policy guided by the logic of early investment in human capital in order to secure equality of opportunities (Raczynski and Cominetti, 1994:16). In line with the introduction of this safety-net composed of several targeted social assistance programmes, another significant change in the operation of social policy was its new level of "technification" (Larrañaga, 2010), particularly in regards to the targeting of welfare benefits and the selection of social assistance beneficiaries. Consequently, in 1980 the first instrument of social policy targeting was created in the country – the "socio-economic characterization file" (CAS) – in order to assess households' socio-economic conditions, as well as to identify potential welfare beneficiaries through a scoring system. Another targeting mechanism introduced during this period was the so-called "poverty maps", with the purpose of guiding the process of social policy planning.

⁶The safety-net created during this period included the following main social assistance programmes: "the unemployment insurance" (created in 1974, involving a monetary transfer for unemployed people affiliated to social security); two emergency work programmes (which began in 1975 and 1982 respectively, under the administration of local municipalities); "the family subsidy" (launched in 1981, which distributed monetary transfers to children younger than eight years old from families in extreme poverty and that were not beneficiaries of family allowances, also incorporating pregnant women as beneficiaries since 1982); and finally, "social assistance pensions" (created in 1975 for both older adults from 65 years old, and people with disabilities without access to social security protection) (Raczynski and Serrano, 1985).

Finally, the first national household survey (CASEN) of the country began to operate during the 1980s in order to evaluate the impact of targeting and social spending.

The development of the safety-net and the increasing “technification” of social policy can be considered part of the transformation of the welfare paradigm guiding state social action in Chile as a result of the neo-liberal transformation – namely, from a type of state that ‘distributed benefits’ in accordance with labour affiliation, to one that remains ‘residual’, offering assistance only to “the poor” (Larrañaga, 2010:11). Residual state action through targeted social assistance to some extent did manage to redirect public resources to “the poor”: the share of public social spending among families living in extreme poverty increased from 20% to 33% between 1969 and 1985 (Tironi, 1988; in Richards, 1995:520). In fact, by 1985 the new safety-net, composed mainly of direct monetary transfers for the extremely poor, represented one-third of the total income of the 20% lowest income group in the country (Raczynski and Cominetti, 1994:29) – a significant income contribution that nevertheless did not lead to a substantial improvement in the living conditions of this group during the period. The new social assistance pensions were half of the minimum wage in Chile by 1985, while the non-contributory family allowance was approximately \$8 per child per month (Richards, 1995:521). In the best of cases the safety-net allowed survival but in no case social mobility. Indeed, according to the data provided by the National Statistical Institute (INE), the share of the wealthiest 10% was 37% in 1978, and in 1988 it increased to 47% (Richards, 1995:521). Conversely, while the share of the bottom 50% was 20% in 1978, it decreased to 17% in 1988; this income contraction translated into an abrupt reduction in household consumption among the bottom 40% of the population, whose consumption share fell from 19.4% in 1969 to 12.6% in 1988 (Richards, 1995:521). Overall, a generalised increase in income inequality is one of the most negative legacies of the neo-liberal reforms in Chile, which, in addition to the country’s stratified welfare regime with its residual social assistance policies, leaves space for several critiques concerning the segregated conditions of social integration and wellbeing that have prevailed in Chilean society under the neo-liberal model.

2. “Growth with Equity” and the New Momentum of Social Policy

Among the several social costs left by the neo-liberal transformation carried out in Chile under authoritarian conditions, poverty was the one that captured most of the public attention and action since 1990 when the country began its transition to democracy. To a great extent, the focus given to poverty at the beginning of democratisation was explained by the electoral

campaign carried out by the “*Concertacion*”, the centre-left coalition that defeated Pinochet’s dictatorship in 1989 and that ruled the country without interruption until 2010. The Concertacion’s campaign identified poverty as the ‘country’s main problem’, related to the ‘theme of social justice’, and consequently to the urgent need to deal with ‘the social debt’ left by the military regime (Silva, 1993:478). It was according to these social justice concerns that the new coalition in power sought ‘to make compatible’, under an open market economy, the long-term goals of economic growth with social distribution (Raczynski and Cominetti, 1994:37). In line with this view, the strategy chosen to achieve such goals was the so-called “Growth with Equity”, which in the case of Chile constituted an adaptation of the proposal developed by the Economic Commission for Latin America and the Caribbean (CEPAL) in 1990 denominated “Productive Transformation with Equity”. In the context of Chile, “Growth with Equity” constituted not only the socio-economic strategy chosen by the new coalition in power ‘to lessen the neo-liberal bias institutionalized during dictatorship’ (Sanchez, 2014:63), but more importantly it constituted the Chilean “third way” or “hybrid model” (Olmos and Silva, 2010; Martin, 2009) through which the new democratic governments would try to promote ‘a more equitable form of national development’ (Taylor, 1995:79) – one that would give a crucial role to social policy (Arellano, 2005).

Consequently, since 1990 the most important goal of social policy was “the payment of the social debt” whose worst expression was the almost 40% of the population living in poverty in the country, along with the reduced and insufficient levels of social expenditure to deal with population needs (Raczynski and Serrano, 2005). In the light of these concerns, a series of measures were taken by the first democratic administration, such as increasing social spending, improving the state social network, and providing priority attention to population groups regarded as vulnerable (Sanchez, 2014). Consequently, between 1990 and 2000 the level of social spending increased from 12% to 17% (MIDES, 2014), with increments of 178% in the educational sector and 166% in the health sector (Larrañaga, 2010:14). However, the most impressive achievement during the 1990s was the substantial reduction in the levels of poverty in the country. Indeed, in 1990 39% of people lived in poverty, by 2000 this percentage had declined to 21%. To a large extent, this reduction in poverty was explained by the good rates of economic growth achieved during the decade, which saw an increase of both the labour income and the work opportunities available for lower income groups (Arellano, 2005:411). To a lesser extent, monetary transfers also contributed to improving the income levels of lower income groups during this period, which as a result of their increase in value since 1990 represented 45% of the income available among the poorest 20% of the population

in 2000, almost 10% more than in 1990 (Arellano, 2005:420). However, the role played by social policy on matters of poverty reduction was not only limited to targeted monetary transfers. Indeed, since 1990 there was a substantial development of the “welfare field” in Chile as a result of the proliferation of several institutions and social programmes specially created to deal with poverty and the population’s particular needs (Raczynski, 2008). Since this period, there has been a significant growth and diversification of the programmes offered in Chile, which according to Raczynski encompass 400 social programmes with almost 80 participant institutions (Raczynski, 2008:7). Among the most relevant institutions created during this period was “The Ministry of Planning and Cooperation” (MIDEPLAN), created with the aim of coordinating those public initiatives that sought to eradicate poverty, including the implementation of social policies and programmes targeting priority vulnerable groups (children and young people, older adults, people with disabilities, women, and Indigenous groups). In addition, and in order to carry out such specific social policies and programmes, several public institutions dependent on MIDEPLAN were established, such as “The Solidarity and Social Investment Fund” (FOSIS), “The Woman’s National Service” (SERNAM), “The Youth’s National Institute” (INJUV), “The National Corporation of Indigenous Development” (CONADI) and “The Disability’s National Fund” (FONADIS) (MIDES, 2014). This institutional expansion and diversification of the welfare field in Chile was also accompanied by the emergence of a series of “promotional” social programmes that sought to develop tools, expand capabilities, and strengthen user’s information and voice (Raczynski and Serrano, 2005). This new social policy agenda signalled the introduction of a different approach to poverty and vulnerability in the country, one that would aim to leave behind state “assistentialism” (welfare dependency) in order to encourage the active participation of people in ‘the search for solutions to their own problems’ (Bezerra and Maldonado, 2016:233). It took an “activating approach” that would give relevance to social programmes in the areas of education, entrepreneurship and labour training, and would be implemented with the direct ‘support’ and engagement of NGOs, voluntary institutions and the private sector (MIDES, 2014:18–19).

At this point, it is possible to distinguish the significant progress achieved in the country in matters of welfare and social policy under the “Growth with Equity” strategy. Such positive outcomes, according to Castells (2004), signalled a contemporary shift in the model of development in Chile – namely, from the ‘economically regressive and politically repressive’ model established by the military regime, which Castell denominates the ‘authoritarian-liberal-excluding model’, to the new ‘democratic-liberal-including model’ established by the

subsequent democratic governments (Castells, 2004:137). This model kept continuity in matters of economic opening and free-market policies, but was based on a new 'social and political pact' that sought, as observed above, the substantial reduction of poverty, along with the expansion of social provision and population coverage through health and educational services (Castells, 2004:138). Contemporary efforts for increasing the wellbeing conditions of the Chilean population in the context of the "Growth with Equity strategy", with its combination of free-market policies plus social policies, can be regarded as Chilean 'reformed neo-liberalism' (Taylor, 1995:80). A "reformulation" of the inherited neo-liberal model, which through "the payment of the social debt" and the significant development of the welfare field, has focused on the "re-incorporation" of those groups 'marginalized' by the military regime (Taylor, 1995:80), particularly those groups living in poverty.

This "including orientation" observed in Chile by the 1990s also signalled a much wider trend in Latin America, characterised by the development of a new phase of the neo-liberal turn regarded as "the post-Washington consensus" or "neo-liberalism with a human face" (Molyneux, 2008). Similar to what was observed with the Chilean "Growth with Equity" strategy, this new neo-liberal phase in the region did not involve a substantial alteration of 'the broader outline of macro-economic policy' (Molyneux, 2008:780) but instead the introduction of a series of reforms in matters of state social action and welfare development. Among these reforms, it is possible to find: the gradual rehabilitation of the state in matters of development and planning; the new consensus about the need to deal with the social deficits left by structural reforms, which involved in turn the return of social policy to the regional agenda; and finally, the centrality given to poverty relief as 'the central component' of the new social policies in the region (Molyneux, 2008:780). In this context, the contemporary agenda of social policy being developed in the region incorporated a series of new principles, many of which were already functioning in Chile, such as the targeting of public action on poor groups, decentralisation of social services, investment in social infrastructure and human capital, and new concerns for population vulnerability (Barba, 2009). In addition to the technification of social policy, the new Latin American agenda of social policy also signalled how poverty 'became a global priority' during the 1990s (Barrientos et al., 2008:761), and how since then anti-poverty social policies have become one of the most salient features of "neo-liberalism with a human face" or "inclusive neo-liberalism" through which international development agencies 'recognized the need to protect people from the vagaries of unfettered open-market capitalism' (World Bank, 2000, in Hickey, 2010:1139). These new concerns for social inclusion and protection, particularly of those sectors living in poverty, as discussed in Chapter II, must

be understood in the light of the identification of the main social problem affecting both developed and developing countries under globalisation and neo-liberalism: social exclusion. For now, what is important to mention about this new concern for social exclusion is how, since the 2000s, in the Latin American region it has involved the development of a strategy of social inclusion that seeks to secure the social integration of poor and vulnerable groups through social protection policies – a strategy that in countries like Chile has evolved into a comprehensive “system of social protection” that with more or less success have tried to secure a series of basic or minimal “social guarantees”. New social policy development in the region, notwithstanding the constraints imposed by the welfare regimes settled after structural and neo-liberal reforms, seeks to contribute to the realisation of economic, social and cultural rights, although with a “preferential” concern for “the poor” through the expansion of social assistance and non-contributive social security.

3. Seeking Social Inclusion through Rights-Based Social Protection: The Chilean Route⁷

As discussed in previous sections, the neo-liberal transformation carried out in Chile under Pinochet’s dictatorship implied a drastic restructuring of the system of social security of the country through the introduction of market mechanisms in the main social sectors, along with a high deterioration of public welfare channels which, under the principle of subsidiarity followed by neoliberals, became residual. This welfare dualization, previously analysed, was not significantly challenged during the process of transition to democracy during the 1990s, notwithstanding the improvement of the levels of social spending in the main social sectors (in particular health and education), along with a significant expansion and diversification of welfare institutions and social programmes in charge of dealing with the needs of vulnerable and poor groups. In this sense, the major achievement of the decade was the significant reduction of poverty in the country throughout the action of a series of anti-poverty social policies and favoured by a context of positive rates of economic growth that improved the income levels and labour opportunities available to Chilean population under the “Growth with Equity” strategy (Arellano, 2005).

⁷ This section is concentrated in the analysis of the main social protection policies developed in the country during the period from 2000 to 2018, which is the context of reference of this research.

However, by the end of the 1990s a growing social critique began to emerge in Chile as a result of the “equity failures” of the “Chilean model”, shortcomings that made reference to the levels of inequality in the provision of social services in the country, and how it had contributed to consolidate a “dual welfare system” in Chile characterized by the existence of “poor services for the poor” (Martin, 2000:202). This incipient political debate about social inequality in post-dictatorial Chile was significantly influenced by two critical issues. First, even with the substantial reduction of poverty achieved in the country during the nineties, high levels of income inequality remained persistent during the period. Indeed, between 1990 and 2000 the Chilean Gini coefficient increased from 0.554 to 0.564 (CEPAL records)—an increase in income inequality that was explained by a massive income concentration at the top 10%⁸ of the country’s income distribution which nevertheless that has been regarded as one of the most distinctive features of social inequality in the country (Espinoza, 2012; Ottone and Vergara, 2007; Contreras, 1999). Overall, the evidence pointed to one of the most critical shortcomings of the model of socio-economic development established in Chile since the return to democracy, namely, the fact that improvements in population life’s conditions did not imply ‘substantial alterations in income distribution’ (Espinoza, 2012:23). This is why the critiques raised against “the Chilean model” concentrated significantly on the scarce redistributive impact of the agenda of social policy in the country since 1990, as it gave high priority to the reduction of poverty, but not to social inequality (Garretón, 2002; Larrañaga, 2007; Espinoza, 2012; Barozet et al., 2013; Ruiz, 2013).

In addition to the critiques raised against the levels of income inequality prevailing in the country, the 1998 Human Development Report (PNUD) provided evidence about growing levels of social unrest among Chilean population as a result of the insecurities and inequalities produced by the welfare structure in Chile. As identified by the 1998 UNDP report, there were high levels of “uncertainty” among Chilean population about the chances to access to adequate health and social security protection in case of necessity, as well as “distrust” about the educational and employment opportunities brought by the current strategy of socio-economic development in the country (PNUD, 1998). Population’s unrest which according to the UNDP report was signalling the ‘deficits of the mechanisms’ through which the “Chilean model” tried to secure social integration (PNUD, 1998:124). Overall, deficits explained by the dual conditions of social integration prevailing in Chilean society under a welfare regime

⁸ According to CEPAL records, while the income-share of the 10% of the population at the top of Chilean income distribution in increased from 45.2% to 46.2% between 1990 and 2000, the share of the 10% at the bottom remained stable at 1.2% during the whole period.

characterized by the privatization of social services, and the provision of residual social assistance (Garretón, 2002). Under these stratified welfare conditions, the most critical issue about the “Chilean model” was, following Garretón, ‘the configuration of citizens of first, second, and third-class’; something that in a country with high-income inequality like Chile contributes to ‘widen the scope of social inequality’ (Garretón, 2002:48) since class inequality is reproduced in the sphere of welfare and social citizenship.

It is in the context of the debates about social inequality and the shortcomings of the “Chilean model” to secure better and more equal conditions of social integration, that “social protection policies” began to developed in Chile. In fact, it is associated with the social reforms carried out under the socialist governments of Ricardo Lagos (2000–2006) and Michelle Bachelet (2006–2010), the period when social policy ‘entered an expansionary phase’ (Castiglioni, 2018:60) whose ‘normative hallmark’ was a major role of the state in the sphere of the social (Martin, 2009:200). Nevertheless, the expansion of social protection policies in Chile was not only shaped by the country’s specific contingencies, but also by the growing international consensus about the need to establish better mechanisms of social protection, particularly among the countries of the global south. In fact, in the context of developing countries, the ‘astonishing’ advancement of the ‘concept’ as well as the ‘practice’ of social protection since the mid-1990s has been described by Barrientos and Hulme (2008) as a “quiet revolution” ‘emerging from and responding to, social and economic transformation’ (Barrientos and Hulme, 2008:3–4). Such transformations, as exemplified by the Chilean case, have to do with the critical consequences produced by structural adjustment reforms, globalisation, and economic crisis among developing countries.

In terms of conceptualization, social protection can be defined as ‘public actions taken in response to the levels of uncertainty, risk, and deprivation’ (Conway, De Hann, and Norton, 2000; in Barrientos and Hulme, 2008:3). Consequently, the main goals of social protection are to ensure basic income levels, access to social and public services, and ‘secure decent work for all’ through contributory and non-contributory protections, along with labour market regulation (Cecchini and Martinez, 2012:16). While social insurance schemes encompassing health and unemployment protection are the most characteristic type of contributory social protection, social assistance schemes either universal or means-tested are representative of non-contributory channels of social protection (UN, 2018). Beyond its different components, it is relevant to observe how social protection, understood ‘as a policy instrument’ for the eradication of poverty and the promotion of development, gained international momentum in

the 2000s (UN, 2018:7) across several international development agencies. In fact, through the 19th International Labour Conference developed in 2001, the ILO (International Labour Organisation) stressed the critical role to be played by social security in fostering cohesion and ensuring peace and social inclusion, reaffirming the ‘obligation to extend social security measures to provide a basic income to all in need of such protection and comprehensive medical care’ (ILO, 2001; in UN, 2018:7). By 2003 the World Bank, in turn, acknowledged how social protection constitutes ‘a key instrument for developing’ considering its potential for both reducing vulnerabilities and smoothing out patterns of consumption (UN, 2018:7). Since the 1990s the World Bank was already developing a social protection strategy in order to deal with the negative impacts produced by structural adjustment policies among developing countries (Barrientos and Hulme, 2008:11). Support for social protection that in the case of the World Bank has been shaped by the “social risk management” approach which has sought to ‘assist individuals, households and communities in better managing income risks’ (Holzmann and Jorgensen, 1999:4; in Barrientos and Hulme, 2008:5).

Nevertheless, a major step towards the widespread adoption of social protection policies across developing countries was taken in 2009 when the United Nations launched its “Social Protection Floor” as part of its joint crisis initiatives to deal with the 2008 financial crisis (UN, 2018:7). The “Social Protection Floor” initiative aimed at providing ‘a rights-based, systemic “insurance” against poverty for all at all times’ was endorsed by states members in the 2012’s United Nations Conference, while the ILO ‘adopted the Social Protection Floor recommendation’ (n°202) by the same year (UN, 2018:7). Following these trends, the Economic Commission for Latin America and the Caribbean (CEPAL) began to call for the establishment of a “new social pact” by 2006 focused on the notion of “rights-based social protection” (CEPAL, 2006). The new social pact has encouraged the establishment of “integral” systems of social protection among the countries of the region based on new political agreements concerning the determination of the rights that apply to all citizens, the ways in which they are to be guaranteed, and the mechanisms through which rights can be made feasible (CEPAL, 2006:37). In this sense, “protection as a citizen guarantee” constitutes a distinctive approach that envisions a ‘comprehensive and inclusive social protection’ following the precepts provided by the 1948 “Universal Declaration of Human Rights”, and the 1966 “International Covenant on Economic, Social and Cultural Rights”, among others international instruments (Cecchini and Martinez, 2012: 39). Consequently, social protection “as a citizen guarantee” is focused on ‘the realization of economic, social and cultural rights’ (Cecchini and Martinez, 2012: 39), a focus that implies ‘to re-think’ public and social policies ‘as part of the

obligations' that states have in the fulfilment of the rights associated with social citizenship, particularly in terms of access to assets, income, and services (Cunill, 2010:44).

In Chile, as previously noted, the development of social protection policies began to develop by 2000, being understood as 'an articulated set of policies and programmes' that seek to act in the 'diverse contingencies and risks that households face' in order to 'compensate them' in those cases where there is lack or reduction in labour income as well as to 'guarantee the access to a social minimum in any circumstance' (MIDES, 2014:20). In this sense, the development of social protection policies has constituted the way in which the country has sought to move towards 'a system that guarantees basic social rights' with the aim of gradually securing 'universal access to benefits' in the spheres of education, health, childhood care, unemployment, and pensions (MIDES, 2014:20). In order to achieve that, the policies of social protection developed in Chile include a series of differentiated social benefits –some benefits targeted and some of wider coverage; some contributive and some non-contributive – with all benefits focused on specific social risks associated with a population's life-cycle, but still 'targeted on the most vulnerable population' (MIDES, 2014:20). Consequently, it was according to this new "universalist" aspiration brought by social protection policies in conjunction with the priority given to the most vulnerable sectors of Chilean society that 'the first initiatives contemplating guaranteed minimums' in the country were particularly targeted on 'the poorest families' (MIDES, 2014) as demonstrated by the so-called "Chile Solidario" system.

"Chile Solidario" (*Solidarity Chile*) was formally recognised by Law n° 19.949, which established a system of social protection for families in extreme poverty and began operation in 2002 under the presidency of the Socialist Ricardo Lagos (2000–2006). In terms of its goals, "Chile Solidarity System" was created to promote the social inclusion of families in extreme poverty and bring them into the state social network. This objective was settled as a result of the identification of a 'hard nucleus of poor households' that by 2000 'was marginalized from both the benefits of economic growth and the social policy network' (Larrañaga et al., 2014:1). In fact, the evidence showed that notwithstanding the substantial reduction in poverty achieved in the country between 1990 and 2000 from 38.6% to 20.6%, since 1996 there was a stagnation in the reduction of extreme poverty in Chile that remained at 5.7% without much alteration (MIDEPLAN, 2004). It was in line with these concerns that "Chile Solidario" was created in order to 'reverse the situation of exclusion' suffered by the 225,073 families living in extreme poverty in the country (MIDEPLAN, 2004:10–13). The goals of social inclusion

envisioned by “Chile Solidario” involved a revision of the social offer in place in the country until 2000, and identified the existence of a series of shortcomings related not only with the fragmentation and sectoral approach behind the offer of social programmes and services in Chile but also in regards to ‘the mode of provision’ that did not pay much attention to ‘the costs and barriers faced by poor households attempting to access’ the state welfare offer (Barrientos, 2010:586). In order to deal with these issues, “Chile Solidario” was developed “as a system” with the aim of articulating the social offer in Chile, as well as to develop a personalised approach to work with poor families, which in essence assumed a more ‘pro-active approach to poverty’ (Barrientos, 2010:586).

In line with such a pro-active approach to poverty, the strategy of social inclusion implemented by “Chile Solidario” encompassed three main components: “psychosocial support”; “guaranteed monetary transfers”; and “preferential access to the state social offer”. The component of “psychosocial support” was one of the most distinctive elements of the system and consisted of a “personalised accompanying” (*acompañamiento personalizado*) offered to the group of families selected by “Chile Solidario” through the professional work developed by the so-called “family supporters” (*apoyos familiares*). The role of these professionals, mainly social workers, was to encourage the development of those personal and family skills needed to satisfy 53 minimal wellbeing conditions to be achieved by households in extreme poverty in seven areas: identification; health; education; family dynamic; habitability; work; and income (MIDEPLAN, 2004). Minimal wellbeing conditions that were in line with the ethical fundamentals behind “Chile Solidario” which made an explicit reference to a “rights-based approach” associated with ‘egalitarian access to opportunities’ (MIDEPLAN, 2004:13). This reference to rights and opportunities included the definition of ‘those social minimums that should be secured for the whole population’ in the country as it constituted the basis from which to guide the actions of social protection focused on those groups without ‘the autonomous capacity to satisfy their needs’ (MIDEPLAN, 2004:13). In line with this rights-based approach, the psychosocial component of Chile Solidario also sought to strengthen the bond of families with the social network in the country, with the aim that people could make use of the social benefits available to them. In terms of implementation, this psychosocial component was carried out by a specific social programme called “*Programa Puente*” (“Bridge Programme”), which was dependent on FOSIS (the Social Investment and Solidarity Fund) and implemented in conjunction with municipalities in every district of the country for 24 months. Up to 2012, 546,096 families were part of the system “Chile Solidario”, representing 10.7% of the national population (Larrañaga et al., 2014:7). Following the trend observed among other Conditional

Cash Transfers programs (CCTs) in the region, in 90% of the cases the "representatives" of the families selected by "Chile Solidario" corresponded to women (Larrañaga et al., 2014:17).

As identified by Bradshaw, Chant, and Linneker (2018), 'women have become a key target for social safety nets and other welfare programmes', particularly among Conditional Cash Transfers programmes (CCTs) (Bradshaw, Chant, and Linneker, 2018:278). In fact, according to Barrientos (2012), CCTs have become "the preferred" model of social welfare to deal with extreme poverty since the mid-1990s under the recent interest on social protection in the region (Barrientos, 2012:66). By 2011 CCTs were present in 18 Latin American countries, 'covering close to 25 million families' and 'representing 19% of the region population' (CEPAL, 2011, in Reiningger et al., 2018:1). In terms of design, CCTs combine the short-term goal of providing income with the longer-term goal of accumulating human capital to avoid the intergenerational transmission of poverty. Moreover, these programmes distribute cash transfers among poor households to reduce poverty through human capital investments connected with children's education and health development.

Nevertheless, since 'investing in women' has come to be seen as 'one of the most efficient routes to ensuring wider development aims', it is not rare to find how women have become the "main beneficiaries" of CCTs who apart from receiving the transfers are made 'responsible for compliance' with the conditions or co-responsibilities associated with the right functioning of CCTs (Bradshaw, Chant, and Linneker, 2018:278). Something that helps us to understand why in "Chile Solidario", the Chilean version of CCTs, it is women as 'mothers' who constitute the programme's 'central psychosocial, economic, and social actor', who must not only receive the cash transfers but also are 'expected to improve intra-family relations and take the children to school and the health clinic' (Borzutzky, 2012:9). Women inclusion into CCTs, the paradigmatic strategy of social protection of XXI's Latin America, that has helped to reinforce 'traditional gender roles by targeting women in their capacities as mothers only' (Jones and Holmes, 2011:46). Dynamics of welfare inclusion of "the poor" behind the strategies of social protection developed after the "neoliberal turn" in Latin America with critical gender implications, an issue to be discussed in much detail in subsequent chapters.

Nevertheless, the recent development of social protection policies in Chile has not only focused on anti-poverty social programmes. On the contrary, it has encompassed significant reforms in other key areas of the welfare regime in place in the country since the 1980s. This is the case of the health reform carried out in 2004 under the presidency of the socialist

Ricardo Lagos (2000–2006) through which it was established the “Universal Plan of Explicit Guarantees” (AUGE) (“Plan de *Acceso Universal con Garantías Explícitas*”) by the law n° 19.966. The main goal driving this reform was to guarantee to the whole population opportune access to health via a set of high impact pathologies (currently 80) whose treatment represented an excessive cost for families (MIDES, 2014). In this sense, the reform was driven, as expressed by president Lagos, by the need of resolving the ‘deep inequality that characterized Chile’s health attention’, considering families’ financial burden as well as the ‘huge inequalities’ prevailing in matters of quality and speed of population’ health attention (Mesa-Lago, 2008:428).

As analysed in previous sections, after the neoliberal reforms the country’s health system became dual. Under this system, workers could ‘choose between the private or public health insurance’ (either FONASA or ISAPRE) in order to contract their mandatory 7% health contributions (Gideon, 2006:1275). Nevertheless, this right to choose, in practice, translated into higher and middle-income groups frequently affiliated to ISAPRES as they were able to finance the co-payments required by private health insurance institutions (Mesa-Lago, 2008:423). On the other hand, those among the poorer population, highly risky, and inhabitants of rural areas were not able to really exercise their right to choose, remaining in most of the cases affiliated to FONASA, the public health system (Mesa-Lago, 2008). Health stratification that in a high extent was explained by the fact that ISAPRES defined the premiums as well as the coverage of individual health plans based on the ‘risk profile’ of the insured, considering factors such as age, sex, and pre-existing conditions (Staab, 2017:80). As a result of this design, it is not difficult to understand why by 2015 only 16% of the population contributing to health insurance was affiliated to ISAPRES (UNDP, 2017:334). Among those population groups categorized as “risky” by ISAPRES were women who have remained significantly excluded under private health insurance in Chile (Gideon, 2008:77). The exclusion is explained by several factors such as women’s lower wages that impede them to contract ISAPRES’ plans in the same proportion as men, as well as the higher costs to be paid by women under the private system, particularly for those in reproductive age (Gideon, 2008:77). In fact, previous to the AUGE health reform, ISAPRES were selling the so-called “plan without uterus” which ‘excluded services related to pregnancy and birth’ (Gideon, 2008:77).

However, discrimination was not the only problem of the dual health system established in Chile after the neoliberal reforms. Opportune access to health was another critical issue (Mesa-Lago, 2008), particularly under public health insurance where lower-income groups had to wait long periods to receive proper health services and attention. Problems explained by the fact that apart from covering the majority of the population, FONASA had to cover those groups with lower-income and higher-risks, collecting fewer resources from contributions (Mesa-Lago, 2008:425). It is under this scenario that in 2002 the AUGE plan was thought by president Lagos as a way to 'guarantee the right to health' through the definition of a series of "health guarantees" in terms of access, opportunity, quality, and financial protection (Mesa-Lago, 2008:429). According to Dannreuther and Gideon (2008), the "AUGE plan" can be regarded as the first example in Latin America of a social policy reform guided by the logic of guaranteeing economic and social rights to all citizens with the aim of seeking more inclusive forms of social protection (Dannreuther and Gideon, 2008:846). In fact, from the perspective of social guarantees, AUGE was able to secure by law: "opportunity guarantees" (maximum time-waits for people to receive health treatment either in public or private institutions); "quality guarantees" (through the certification of health institutions and professionals); and guarantees of "financial protection" (as a result of the establishment of co-payment limits to be paid by families in private health institutions) (Larrañaga, 2010).

Although the reform 'did not modify the dual public-private structure that characterizes the Chilean health system', it sought to improve equity and health sector responsiveness (Staab, 2008: 77). In fact, the AUGE plan guarantees to all ISAPRE and FONASA affiliates a series of quality services in those pathologies covered by the plan independent from income, gender, and risk profile (Mesa-Lago, 2008:429). Health guarantees which are positive in terms of equity considering that, previous to the reform such services 'would not have been available to all users because of costs issues' (Gideon, 2008:78). In terms of gender equality, however, the impacts of the reform are more problematic considering, as pointed by Gideon, the lack of attention paid to the "gender bias" underlying some of the new protocols of attention defined by the plan to reduce users' waiting times which were based on 'gendered assumptions about women's capacity to undertake unpaid care work' (Gideon, 2008:78). In this sense, the 'emphasis' on reducing the time spent in hospital by patients as well as on increasing home care in the case of chronic and terminal illnesses, contains the 'implicit assumption that once in-home, patients will have someone available to look after them' (Gideon, 2008:78). Something that indicates how the Chilean health system continues to rely on the unpaid provision and preventive curative health carried out by family members, specifically by women,

as is overwhelmingly women who take care of sick or elderly dependants, bearing all the opportunities costs that this work implies (Staab, 2017:85). In addition to the lack of attention given by the reform to reproductive rights and domestic violence, it is possible to conclude that after the AUGE plan, the health system in Chile ‘continues to be a “maternalized system”, that is, one that is still ‘dependent on the assumed domestic, caring role of mothers who are willing and able to exclusively take on a care-giving role’ (Gideon, 2008:76).

Apart from health, another emblematic social policy reform developed in Chile following the logic of social protection and citizenship guarantees was the 2008 social pension reform established under the first administration of the socialist president Michelle Bachelet (2006–2010). The reform was established by Law n° 20.255 through which a system of “solidarity pensions” (*pensiones solidarias*) was created to benefit older adults, people with disability, and persons without enough social security savings (MIDES, 2014). In terms of relevance, this social security reform was a priority in Chile in light of the negative results produced by the individual system of capitalisation established under the military regime. As previously identified, the neoliberal reforms developed in Chile during the 1980s implied a complete dismantling of the past ‘corporatist pay-as-you-go arrangements’, being replaced by a ‘privately administered system of individual capital accounts’ (Staab, 2017:111). Under this system is that AFPs (Pension Funds Administrators) developed: private and for-profit institutions in charge of managing workers’ mandatory contributions (10% of workers’ income). Given that the new pension system established ‘a direct link between’ old-age entitlements and workers’ contributory records, then, lower wages, longer unemployment periods, and formal economic inactivity, translated ‘into lower pension benefits’ (Staab, 2017:111). In fact, by 2000 there was evidence about the low density of social security contributions among the country’s population as a result of the “fragmented” and “accidental” labour inclusion prevailing among Chilean workers, something particularly salient among specific population categories such as women, low-skilled workers, and informal workers (Larrañaga, 2010).

A case in point here is the situation of women under the new private pension system. As pensions’ entitlements became more tied to the salaries and contributions made by affiliates during their whole working lives, women found themselves particularly disadvantaged considering how they ‘tend to have lower rates of labour participation’, and thus, ‘fewer years of contributions’ (De Mesa and Montecinos, 1999:21). As a result, research found that ‘by 2016, women’ pensions, even after the inclusion of additional non-contributive benefits, had pensions that in average were 30% lower than those of men’ (PNUD, 2017:333). Here the

problem is not only the lower density of contributions accumulated by women in their individual capital accounts as a result of their precarious or inexistent participation in the labour market. In addition, women found themselves particularly disadvantaged in the pensions system because of rules that define a younger age of retirement in the case of women (60 years old, while men's retirement age correspond to 65), along with women's higher life expectancy. Therefore, women's contributions are five years fewer than men, and with their accumulated funds they must 'finance a longer retirement period' (De Mesa and Montecinos, 1999:22). Lastly, the situation of women and other groups with precarious life trajectories was even worse under the private pension system considering how for assuring a minimum pension, workers needed to accumulate at least 240 monthly contributions, that is, 20 years.

As a result of the shortcomings identified in the private system of individual capitalization, the new system of "solidarity pensions" established by president Bachelet in 2008 established a series of additional mechanisms of social security protection, including: the "*Pension Básica Solidaria*" (solidarity-basic pension), a non-contributory social pension available for the 60% most vulnerable older adults, including people with disabilities; the "*Aporte Previsional Solidario*" (social support contribution), for people without enough social security savings; and the "*Bono por Hijo*" (bonus per child), for all women 65 or older, which functions as a supplement benefit added to every mother's pension (MIDES, 2014). Through these instruments, this social security reform allowed the introduction of a "solidarity pillar" (*pilar solidario*) into the system of individual capitalisation, transforming the whole system of social security of the country into a "mixed" one that combines an individual-private component with other of public-redistributive character (Larrañaga, 2010). Redistributive measures also had important gender implications. Indeed, in the light of the 'gendered patterns' underlying poverty and labour market participation, the strengthening of the solidary pillar through the expansion and improvement of non-contributory pensions in Chile 'implicitly benefits women who are overrepresented among' the beneficiaries of such pensions (Staab, 2017:115). Overall, it is possible to conclude that, by strengthening the importance of non-contributory and top-up pension benefits, the 2008 reform was able to reduce 'class and gender stratification in access and, to a lesser extent, in benefit levels' (Staab, 2017:117). In fact, the benefits provided by the reform help to decommmodify economic security during old age by reducing dependence on the market among older adults from lower-income groups (in particular for those that belong to the 60% poorest population) (Staab, 2017:117). From the perspective of social citizenship, these are positive outcomes though they operate differently in the case of women. Apart from the fact that the 2008 reform still maintains some rules particularly detrimental for women

(different retirement ages based on sex and actuarial tables that punish women in reproductive age), the reform introduced some measures sensitive to gender difference. This was the case of the “Bonus per Child” which, by targeting mothers, provides recognition of ‘unpaid care work as a basis for entitlement to’ pensions in the case of women, reinforcing, however, ‘different entitlement bases for men and women’ (Staab, 2017:119) under the reformed Chilean pension system.

Along with the 2008 pension reform, the establishment of the Subsystem of Integral Childhood Protection “*Chile Crece Contigo*” (Chile Grows with You) can be regarded as other significant social policy reform developed under the first administration of Michelle Bachelet. In line with a ‘life course narrative that advocated social protection “from the cradle to old age”’ (Staab, 2017:135), “Chile Crece Contigo” was formulated as an inter-sectoral policy focused on early childhood development with the aim of reducing the biopsychosocial gaps between children from different socio-economic backgrounds (Larrañaga, 2010:24). Ambitious goal settled after the work carried out by the Presidential Advisory Council for Child Policy Reform established previous to the design of “Chile Crece Contigo” which identified significant levels of poverty affecting children in Chile, a situation that ‘affected and undermined [their] opportunities for development’, generating a series of inequalities ‘that persist into adulthood’ (Torres et. al, 2017:5). Therefore, one of the main purposes of the reform was to guarantee equal opportunities for children’s development independent of their socio-economic origin. This resulted in the creation of 1.800 new crèches and kindergartens in charge of providing free pre-school education to children between 0 and 4 years old belonging to the 40% most vulnerable households of the country; coverage that since 2011 was extended to the 60% which implied a widening of the targeting from the second to the third socio-economic income quintile.

According to Staab, one of the fundamental drivers behind the enactment of “Chile Crece Contigo” with its new offer of childcare services ‘was the convergence’ of several state institutions ‘around a pro-(female)-employment/anti-(child)-poverty agenda’ (Staab, 2017:147). In this sense, ‘ideas of social investment’ shaped authorities and policy-makers support for the expansion of ECEC (early child education and care) in Chile, being identified as ‘an economically sound policy option that would increase children’s human capital as well as the employability of their mothers’ (Staab, 2017:135). As the expansion of childcare services represented a concrete state offer ‘to partly de-familialize’ care and education among younger children, it had the potential of ‘relieving women of some of their unpaid responsibilities’, as

well as ‘enhancing their ability to engage in paid employment’ (Staab, 2010:619). Nevertheless, here is important to consider that more than a ‘strategy for mobilizing female labour force participation’, ECEC policies are focused on ‘the long-term advantages of proving public support for early childhood education’ (Jenson, 2010:65), a focus that is consistent with the “social investment perspective” shaping the developing of CCT programmes and ECEC services among Latin American countries (Jenson, 2010; Arza and Martinez, 2018). In fact, the “social investment perspective” implies a particular ‘logic for fighting poverty’ that encourages human capital accumulation ‘beginning with pre-school children’; ‘assuring the future’ through ‘social spending designed to break with the intergenerational’ transmission of poverty; and support for child-centred interventions as they ‘enrich our common future’ (Jenson, 2010:61).

It was following the emphasis on children’s earlier development brought by the “social investment perspective” that the establishment of the Subsystem of Integral Childhood Protection “*Chile Crece Contigo*” contemplated a set of different components. The first one was the creation of the programme “*Apoyo al Desarrollo Biosicosocial*” (Biopsychosocial Development Support Programme) which acts as the ‘gateway’ of “Chile Crece Contigo”, including a series of benefits-oriented on encouraging ‘key child development milestones at pregnancy, childbirth, and well-baby check-ups’ (Torres et al., 2018:6). The programme is implemented by the Ministry of Health in all public health institutions of primary care where more than 80% of Chilean children are treated (Torres et al., 2018:8). In the case of children belonging to the 40% most vulnerable population, “Chile Crece Contigo” provides them with preferential access to the public offer of social services including ‘technical aids for children with disabilities’, ‘guaranteed access’ to anti-poverty programmes, as well as ‘free access to day-care or preschool programmes’ (Torres et al., 2018:8). Here is important to consider that by 2006, ‘only 6% of all children under the age 2, and 24,5% of children aged 2-3 years were enrolled in ECEC institutions’ in Chile (Staab, 2017:140). In addition, there was evidence about that childcare remained ‘both highly maternalized and familiarized’, with different degrees of ‘familiarization’ in accordance with households’ income capacity to buy-in services (Staab, 2017:137). From these trends, increasing the access to day-care services for children between 0 and 1 years old, as well as of kindergartens for those between 2 and 3 years old was settled as ‘priority policy’ for president Bachelet, particularly for children from lower-income households (Staab, 2017:141). Consequently, it was found that, after the establishment of “Chile Crece Contigo”, the offer of ECEC services had grown significantly in the country. In fact, between 2005 and 2009, crèches coverage increased from 539 to 3.259 places, while

the coverage of kindergartens increased from 1.469 to 2.944 during the same period (BCN, 2011). Apart from this significant expansion of ECEC, there is evidence about the positive impacts produced by “Chile Grows with You” on children’s social development, and in the ‘remediation of developmental delays’, among others (Torres et.al, 2018:9).

Nevertheless, the evidence also indicates that notwithstanding the significant increase in the number of crèches and kindergartens during the last years, the widening of this offer has not been correlated with an increase in the rates of female labour participation in the country (Manley and Vasquez, 2013; BCN, 2011; Encina, 2009). Here is important to consider that apart from the fact that Chile shows one of the lower rates of female labour participation in Latin America (Vargas, 2014; Cecchini et al., 2012; Encina, 2008), which in 2015 amounted to 47% (against 71% for the case men (CASEN, 2016), there is a high difference between the rates of labour participation of women from the extreme income groups. Indeed, according to the 2015 CASEN survey, the female rate of participation in the lower 10% of the population corresponded to 26.9% in 2015, while in the case of the highest 10% amounted to 68.6% (CASEN, 2016). In this sense, even when the expansion of ECEC services was regarded as a “win-win policy” supporting children’s development as well as women’ labour participation or “work-family reconciliation”, ‘they may not hold the key to women’s labour force participation’ (Staab, 2017:158). Apart from the fact that labour market regulation policies ‘remained essentially off the agenda’ (Staab, 2017:154) at the time of designing and implementing “Chile Grows with You”, ‘precarious’ opportunities of labour integration along with ‘low-wages’ imply that for a significant number of Chilean women ‘paid work is not necessarily an empowering experience’ nor an activity that secures ‘economic autonomy’ (Staab, 2017:158). In this sense, it is the very structure of the Chilean labour market itself which creates a series of tensions for working mothers produced by the terms and conditions of women’s labour participation prevailing in Chile whose improvement ‘continue to face significant resistance’ (Staab, 2017:154). A critical issue that nevertheless will acquire a little more attention in subsequent social policy reforms.

Finally, in the context of the social protection policies developed under the first administration of Michelle Bachelet (2006-2009), it is possible to find how the Subsystem of Integral Childhood Protection “*Chile Crece Contigo*” was integrated into the new “Inter-Sectoral System of Social Protection” (*Sistema Intersectorial de Proteccion Social*) established in 2009 through Law n° 20.379. This new inter-sectoral system of social protection was defined as a model of management constituted by the actions and social benefits provided by different state

organisms to the population groups with major levels of socio-economic vulnerability (MIDES, 2014). In terms of organisation, the “intersectoral system of social protection” will include two different subsystems: on the one hand, “Chile Crece Contigo” and, in the other hand, the already established “*Chile Solidario system*” which between 2007 and 2009 widened its coverage to work with particular trajectories of risk or vulnerability. Consequently, we found that apart from the “Bridge Program” (*Programa Puente*), the “Chile Solidario System” will encompass three additional anti-poverty programmes: “The Bonds Programme” (targeting vulnerable older adults); “The Street Programme” (working with homeless people); and “The Opening Roads Programme” (focused on children and adolescents who have one of their significant adults in prison).

Nevertheless, under the new right-win administration of Sebastian Piñera (2010-2013), the “Chile Solidario System” began a phase of gradual replacement by the new subsystem of “*Seguridades y Oportunidades*” (“Subsystem of Securities and Opportunities”), initially known as “*Ingreso Etico Familiar*” (*Family Ethical Income*). According to Law n° 20.595, the main focus of “the subsystem of protection and social promotion securities and opportunities” was to provide securities and opportunities, as well as to promote access to better living conditions, to those groups and families living in conditions of extreme poverty in the country (MIDES, 2014). In this sense, the new subsystem was established to gradually replace “Chile Solidario” through the inclusion of a stronger emphasis on employment, an increase in the size of monetary transfers, along with a major role given to conditionalities (Martin, 2016). Here is important to consider that the need to replace “Chile Solidario” was justified by the poor results achieved in matters of “work and income generation” among the households selected by the system (Larrañaga et al., 2014; Vargas, 2014). In fact, official assessments provided evidence about the precarious labour integration of the beneficiaries graduated from *Chile Solidario*, characterised by unprotected and informal labour conditions, associated in turn with very low wages (MIDEPLAN, 2009; in Vargas, 2011). Another critical issue of “Chile Solidario” was the ‘rather small’ size of monetary transfers, which apart from their very ‘narrow’ targeting had a very low impact on beneficiaries’ income (just over a 10% of increase of household income among the lowest income decile) (Brandt, 2012:13). Consequently, one of the main innovations introduced by the “Subsystem of Securities and Opportunities” was the incorporation of a new component into the anti-poverty strategy established since “Chile Solidario” – namely, the component of “socio-labour support”. According to Law n° 20.595 that established the subsystem, the purpose of this component is to improve beneficiaries’ capacities to generate autonomous income, improving their conditions of employability and

participation in the labour sphere. Socio-labour support that came to be added to the component of “psychosocial support” included in the anti-poverty strategy of the country since “Chile Solidario”, which seeks to promote the development of skills and capabilities that allow beneficiaries’ social inclusion and autonomy.

Apart from the new component of socio-labour support, one of the most significant innovations brought by the establishment of the “Subsystem of Securities and Opportunities” was the increase and diversification of cash transfers in the country. The rationality behind such diversification and improvement of monetary transfers was seeking to relieve poverty by both ‘increasing family income, and generating incentives for schooling, sanitary attention, along with educational and labour achievements’ among those groups living in extreme poverty (Arza and Chahbenderian, 2014:37). Following this logic, the conditional and unconditional cash transfers provided by the anti-poverty programmes that form part of the “Subsystem of Securities and Opportunities” are organised according to three pillars, the so-called “*Bonos por Dignidad*” (“Dignity transfers”), “*Bonos por Deberes*” (“Duty transfers”) and “*Bonos por Logros*” (“Achievement transfers”) (MIDES, 2016). The following table specifies each group of cash transfers, considering their target populations, goals, and benefits⁹:

⁹ The table only includes the cash transfers associated with the anti-poverty programmes that form part of the “Subsystem of Securities and Opportunities”.

Table 1: List of Cash Transfers included in the Subsystem of Securities and Opportunities

PILLARS	TRANSFERS	BASIC FEATURES
“BONO POR DIGNIDAD” (DIGNITY TRANSFERS)	“Bono Base Familiar” (The Basic Family Transfer)	To all beneficiaries receiving the psychosocial and/or labour support components contemplated in the anti-poverty programs that form part of the subsystem of securities and opportunities. The goal of the transfer is to cover the gap between families’ potential income per capita and the extreme poverty line. The benefit lasts for 24 months and its size depends on the total number of subsidies received by beneficiaries. The transfer decreases over time.
	“Bono de Protección” (The Protection Transfer)	The transfer provides a monthly payment to beneficiaries for meeting the requirements for participation established by the subsystem’s anti-poverty programmes. The transfer lasts for 24 months, decreasing over time. The transfer varies from app. \$26.04 to \$17.50 US dollars (2017 values)
“BONO POR DEBERES” (DUTY TRANSFERS)	“Bono por Control Niño Sano” (The Healthy Child Control Transfer)	Transfer targeting families with children younger than 6 years old. The transfer is provided under the condition of attending the healthy child controls. The transfer lasts for 24 months. The transfer amounts to app. \$10 US dollars (2017 values)
	“Bono por Asistencia Escolar” (The School Attendance Transfer)	Transfer provided to families with children and adolescents between 6 and 18 years old attending primary and secondary schools. The transfer is provided under the condition of a rate of school attendance equal to or higher than 85%. The transfer lasts for 24 months. The transfers amounts to app. \$10 US dollars (2017 values)
“BONO POR LOGROS” (ACHIEVEMENT TRANSFERS)	“Bono al Trabajo de la Mujer” (The Woman’s Employment Transfer)	Transfer targeted on working women either in formal or informal work, between 25 and 59 years old, and that form part of the 40% most vulnerable of the Chilean population. The transfer is provided to those women that keep up-to-date social security contributions. The amount of the transfer varies according to women’s income. While 2/3 of the transfer goes directly to women beneficiaries, the other 1/3 goes to employees.
	“Bono por Logro Escolar” (The Educational Achievement Transfer)	Transfer provided to families with members younger than 24 years old, enrolled in primary or secondary education (from the 5 th grade to the 12 th grade), and that form part of the 30% of students with the academic best performance. The transfer is provided to the 30% most vulnerable of the population. It is an annual transfer that lasts for 4 years. The amount of the transfers varies according to the level of academic performance: <ul style="list-style-type: none"> - For students among the 15% with the best academic performance, the transfer amounts to app. \$93 US dollars (2017 values). - For students between the 15% and 30% with the best academic performance, the transfer amounts to app. \$56 US dollars (2017 values).
	“Bono por Formalización del Trabajo” (The Work Formalization Transfer)	Transfer provided to beneficiaries of the subsystem of securities and opportunities participating in the social-labour support. The transfer is granted to those beneficiaries that show records of social security contributions for at least 4 months during the process of intervention. The transfer amounts to app. \$318 US dollars (2017 values).
	“Bono por Graduación de 4° medio” (The Secondary School Graduation Transfer)	Transfer provided to beneficiaries of the subsystem of securities and opportunities, participating in the psychosocial support. The transfer is granted to those beneficiaries of 24 years old or older that complete secondary education. The transfer amounts to app. \$80 US dollars (2017 values).

Source: Ministry of Social Development (MIDES, 2016), complemented by the information available on the website of the current multi-services state network “Chile Atiende” <https://www.chileatiende.gob.cl>. Additionally, the studies of Arza and Chahbenderian (2014), and Cecchini et al. (2012) were also consulted.

As identified from the table, the “Dignity transfers” corresponds to two unconditional cash transfers – the “basic family transfer” and the “protection transfer” – both targeted at families and people living in extreme poverty participating in the anti-programmes that form part of the subsystem of securities and opportunities. The “Duty transfers”, in turn, encompass conditional cash transfers associated with children’s school attendance and healthy controls. Lastly, the “Achievement transfers” include conditional cash transfers targeted at the 30% and 40% of the most vulnerable population, encompassing transfers conditional to graduation from primary and secondary school, and transfers for labour formalisation, including the “Subsidy to Woman’s Employment” (“*Subsidio al Empleo de la Mujer*”) targeted at waged and independent female workers with social security contributions, particularly relevant in a Latin American country with one of the lowest rate of female labour participation (Cecchini et al., 2012). In fact, the subsidy to woman’s employment was created to ‘promote’ the incorporation of women into the labour market with the aim that they can ‘sustainable exit poverty’ (Larraín and Henoch, 2016:9). Promotion of women’s inclusion into the labour market especially emphasized during the first administration of Sebastian Piñera, which expressed not only in the establishment of the subsidy to women’s employment but also in the ‘support’ given to ‘female entrepreneurship’, particularly through the programmatic offer provided by SERNAM at the time (Godoy and Raposo, 2020:268-269).

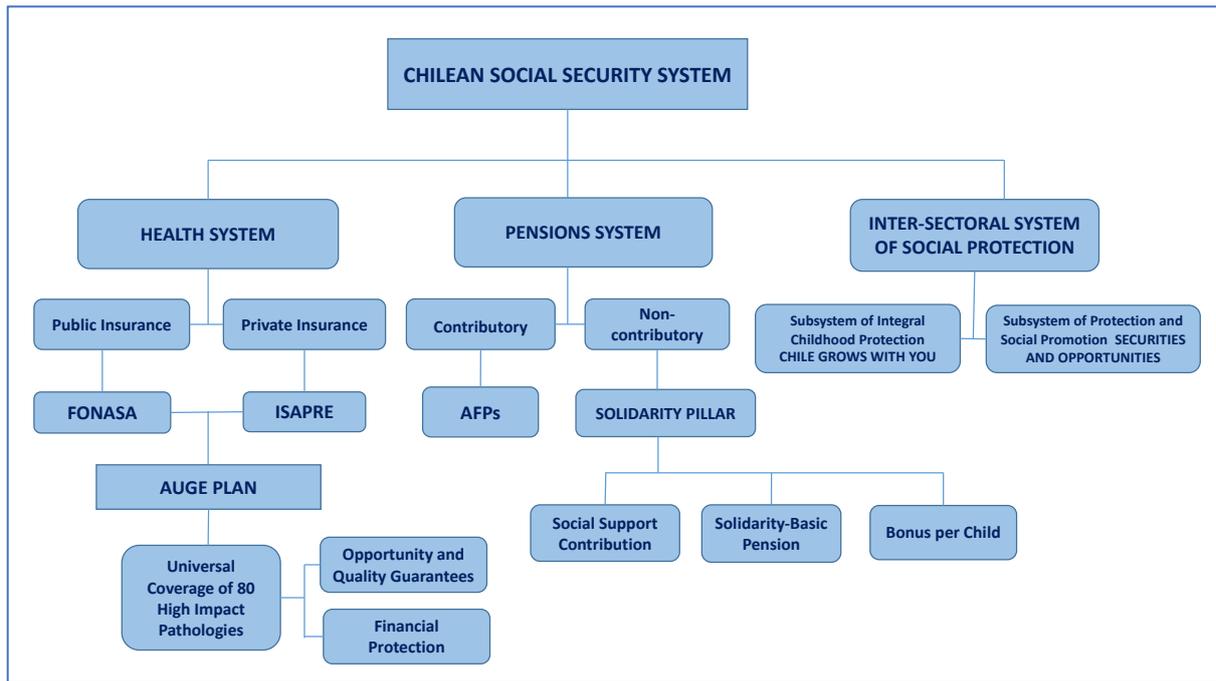
In terms of the target population, the new subsystem of securities and opportunities identifies the same groups included in the system “Chile Solidario” – namely, “families in extreme poverty”, plus “older adults” of 65 years old or older in a situation of poverty, living alone or with another person; “homeless people”; and “children” from families where one of the significant adults is imprisoned. Consequently, in terms of its composition, the new “Subsystem of Securities and Opportunities” includes three of the four anti-poverty programmes that were part of the previous “Chile Solidario” system: the “Bonds Programme” (for older adults); the “Street Programme” (for homeless people); and the “Opening Roads Programme” (for children with one of their significant adults in prison). However, the previous “Bridge Programme”, the articulating programme of “Chile Solidario” targeted on families in extreme poverty, was replaced by the new “Families Programme”. New anti-poverty program that, as was also the case in “Chile Solidario”, shows a high predominance of poor women as the main beneficiaries of the programs in their status as “mothers” and “representatives” of the family group. A critical issue to be analysed in much detail in subsequent chapters.

Finally, in terms of budget, the establishment of the “Subsystem of Securities and Opportunities” with its set of cash transfers involved a significant increase of resources in comparison to “Chile Solidario”. In fact, by 2011 the budget assigned to the “Subsystem of Securities and Opportunities” was US\$134.4 million dollars – an increase in resources of 72% in comparison to “Chile Solidario”, amounting to 0.15% of GDP, and the transfers of the new subsystem were between 2.4% and 4.3% higher than those granted by “Chile Solidario” (Cecchini et al., 2012). In terms of population coverage, the subsystem’s target group was estimated at 130,000 families, 490,000 people, which represented 76% of the population living in extreme poverty in Chile by 2011 (Cecchini et al., 2012).

The return to power of Michelle Bachelet (2014–2018) did not involve major modifications of the intersectoral system of social protection of the country, nor the anti-poverty strategy articulated through the new “Subsystem of Securities and Opportunities”. Nevertheless, the new socialist administration announced its commitment to incorporate the rights-based approach to the subsystem’s anti-poverty programmes (MIDES, 2016), which involved a reformulation and strengthening of the methodological fundamentals behind the strategy, incorporating the recommendations provided by international development agencies such as the Inter-American Development Bank and The World Bank (MIDES, 2017). As a result, the new methodological guidelines of the “Subsystem of Securities and Opportunities” embraced a multidimensional and dynamic comprehension of poverty and vulnerability. Based on that, it will seek to improve the development conditions of citizens, achieve high levels of equity and social inclusion, and broaden social citizenship (MIDESb, 2016:8). From this rights-based approach, the social inclusion of those groups living under conditions of poverty again received high priority in order to reduce the gaps in the exercise of rights; the strengthening of capabilities among individuals, families, and communities; and favouring the labour incorporation of welfare beneficiaries (MIDESb, 2016:10).

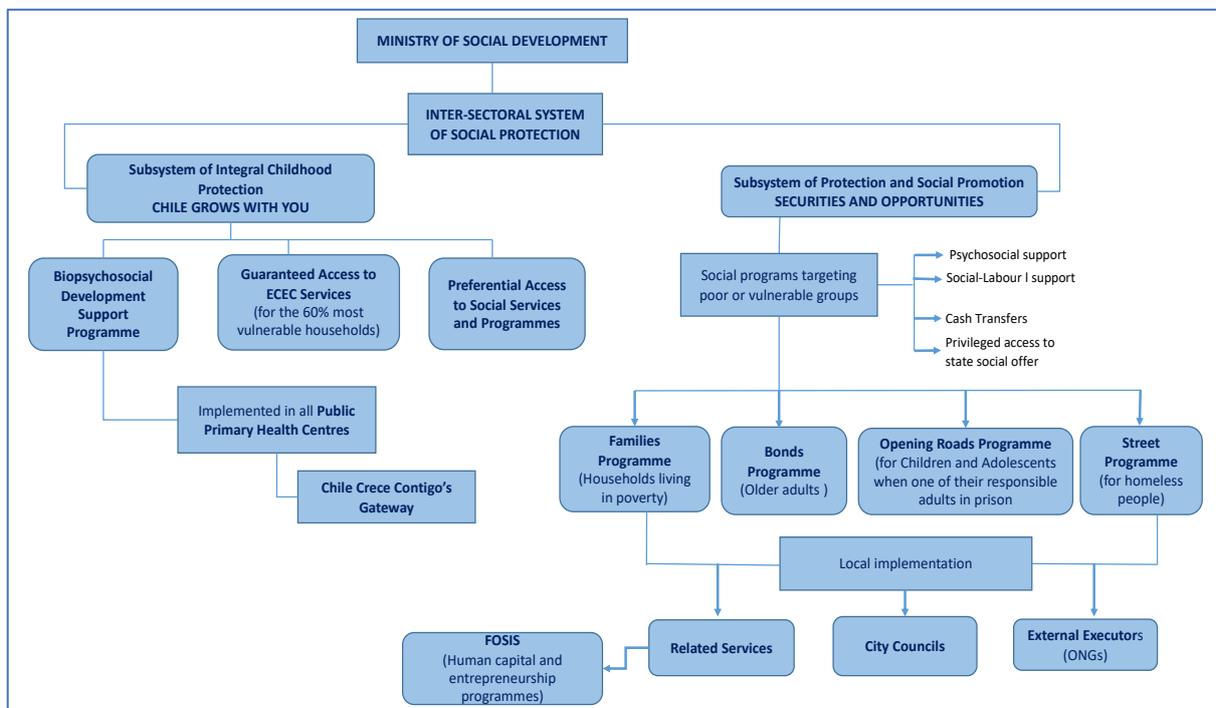
The following diagrammes illustrate the organization and composition of the social security of the country considering the social protection reforms developed during the last decades. While the first diagramme presents the main components of the social security of the country with a particular focus on health and pension’ systems, the second diagramme shows the organization and local implementation of the country’s inter-sectorial system of social protection where the main anti-poverty programs are encompassed:

Diagramme 1: Chilean Social Security System: General Organization and Composition



Source: Author's Elaboration

Diagramme 2: Chilean Inter-sectoral System of Social Protection: Organization, Composition, and Local Implementation.



Source: Author's Elaboration

4. Welfare Citizenship, Maldistribution and (Mis)Recognition

At this point, it is possible to better appreciate the significant expansion, development and institutionalisation of social policy achieved in Chile during the period 1990–2017, the time of interest for this research since it corresponds to the period under which the contemporary system of social protection of the country was established. Over almost three decades the country was able to build a more comprehensive system of social protection that sought to provide guarantees of social protection to the whole population throughout the life cycle (Cecchini et al., 2012), based on a rights-based approach (MIDES, 2016). Considering this social policy development, it is not difficult to understand how Chile sits among the welfare regimes of the region with ‘moderate welfare gaps’ – that is, those countries that exhibit the ‘major potential’ for the establishment of proper welfare states as they show higher levels of labour formalisation as well as better rates of social security coverage, as seen in the population covered by pensions and health insurance (Cecchini, 2016:17–18). Further, Chile has a good record in matters of poverty reduction, due to the dominant place given to the development and diversification of social assistance policies during the last few decades. As a result, while poverty affected 38.6% of the Chilean population in 1990, by 2017 this number decreased to 8.6% (CASEN, 2017) – a substantial reduction that has led Chile to have the second lowest poverty rate in Latin America (CEPAL, 2018).

To some extent, the progress achieved by Chile in matters of social protection and poverty reduction was reflected in the inclusion of the country as one of the members of the Organisation for Economic Co-operation and Development (OECD) in 2010. According to OECD standards, however, the levels of inequality continue to be high in Chile (OECD, 2018:27). In terms of income inequality, Chile ranks 34th of the 38 OECD countries with a GINI index of 0.45 (OECD, 2019), while in the context of Latin America it has the second highest levels of income inequality in the region (CEPAL, 2018). In addition, and based on the methods used by the OECD to measure poverty, which corresponds to the “relative income poverty rate”,¹⁰ the levels of poverty in Chile are significantly higher than those registered by the “poverty line-methods” through which poverty is measured in the country. In fact, in the context of the OECD countries, Chile ranks 30th with a rate of relative income poverty of 0.16 (OCDE, 2019). Here one can see the critical role played by methods when assessing social

¹⁰ According to the OECD, the relative income poverty rate corresponds to the share of the population with an income of less than 50% of the respective national median income, after taxes and transfers, and adjusted for difference in household size (OECD, 2019).

development, and in particular poverty – an issue that has been not exempt from public debate in Chile. Indeed, as a result of the criticisms raised against the poverty-line methods in use since 1987, in 2013 the country introduced a “multidimensional measurement of poverty”, which rather than focusing on basic needs satisfaction, identifies poverty in accordance with five wellbeing dimensions, including health, education, work and social security, housing and environment, and networks and social cohesion. As a result of this change in approach and methods, it was found that the levels of poverty in the country were considerably higher than the 8.6% identified by the poverty line methods – the proportion of the population affected by multidimensional poverty in Chile was found to be 20.7% in 2017 (CASEN, 2017).

Beyond the methods to measure poverty, it is important to note how the problems of inequality in Chile are related to the low redistributive impact of social spending, and in particular monetary transfers. Notwithstanding the fact that cash transfers have considerably increased and diversified in Chile during recent years, social spending per family (measured by direct monetary transfers) is still relatively low compared to OECD standards, representing only 1.8% of GDP while the OECD average is 2.2% (OECD, 2018:28). Between 2013 and 2015 the distribution of monetary transfers in Chile was progressive as 68% of social spending was concentrated on the lowest 40% of households in terms of income distribution (MIDES, 2015:7). However, the redistributive impact of cash transfers has been moderate in Chile since these are considerably low in value (amounting on average to US\$45 dollars per household), resulting in only a minimal increase in the income share of those households placed at the lowest 40% of income distribution (namely, from 14.6% to 16.5%) (MIDES, 2015). This is a moderate redistributive impact that, as can be expected, does not much reduce income inequality, as shown in how after the distribution of monetary transfers the relation between the top and bottom income share deciles (10/10 index) decreased from 27.2% to 16.7% (MIDES, 2015).

Additionally, the country has ‘very scarce redistributive capacity’ in terms of income tax (OCDE, 2018: 34). In fact, as identified by the OECD, the resources generated by income tax in Chile represent a very low proportion of total income as the number of tax-payers is rather small (OECD, 2018: 34) considering that 75% of income earners are exempt from paying income tax as their income is less than US\$874.925 dollars per month (PNUD, 2017:321). At this point, it is important to note that Chile’s tax system is comprised of two main schemes – income taxes, and IVA (valued added tax) – which together amount to 81% of total tax collection in Chile (Larrañaga and Rodriguez, 2014:23). Nevertheless, IVA, which charges 19% on final

consumption goods and services (except for education, health, transport and renting services), represents almost half of the country's tax revenues (PNUD, 2017:321). This tax structure and its exceptions together explain the high significance of general consumption taxes in Chile, and in turn, its negative redistributive implications since IVA can be regarded as a regressive tax because it reduces the consumption capacity of households – which is of course more salient among lower income groups (Larrañaga and Rodríguez, 2014; PNUD, 2017).

However, inequality in Chile is not only a problem of income inequality but also of welfare commodification and social policy stratification. In fact, notwithstanding the significant development of social protection in Chile, which included the establishment of social guarantees in matters of health and social security, along with the provision of social assistance policies and transfers for those groups living in poverty, the de-commodifying effect of these policies has been moderate. The dual welfare regime settled by “the neo-liberal transformation” of the 1980s still prevails in Chile, which is highly unequal concerning the provision and quality of social services (Martin, 2016:206). As such, even though the democratic governments of the country have given priority to the expansion of social spending in the main social sectors (health, education and housing), the access to social services remains highly stratified by social class (PNUD, 2017:38). As a result, the country has a highly segregated welfare structure in which lower income groups have access to free of charge services in public institutions with problems of quality (public education) and efficiency (waiting times in public health services) (PNUD, 2017). In turn, middle-income groups have access to better quality services but through co-payment modalities in education and health institutions receiving state subsidies, while higher income groups have access to services of higher cost and better quality in the private market (PNUD, 2017).

As can be expected, the dynamics of class stratification reproduced by the current welfare regime of the country significantly undermine the citizenship potential associated with the contemporary development of social protection policies in Chile. As acknowledged by the Ministry of Social Development, this is due to the development and expansion of social protection in Chile being a ‘gradual’ process constrained by ‘the principle of subsidiarity’ included in the 1980 political constitution, which has restricted the development of social policy to the limits imposed by a ‘residual welfare regime’ (MIDES, 2016:93). Nevertheless, it is important to consider that there is no theoretical intrinsic relationship between the principle of “subsidiarity” and welfare “residualism”. In fact, in terms of its origins, the principle of

subsidiarity is frequently referred back to the Catholic Encyclical “Quadregesima Anno” (Pius XI, 1931) which formulated the idea that there was

‘no reason to transfer to the collectivity those powers which individuals may themselves exercise, nor to transfer to a higher-ranking collectivity the powers which may be exercised by groups of lower order, and that every collectivity must help the members of society but must neither destroy nor absorb them’ (Ranjault, 1992:49).

According to Spicker (1991), the implications of such original formulation of the principle of subsidiarity have been, on the one hand, ‘partly to treat state intervention as undesirable, at least to the extent that available alternatives are to be preferred’; and, on the other hand, ‘partly to justify a degree of institutional decentralization’ (Spicker, 1991:4). Implications that together can be explained by the ‘organic view of society’ underlying the conceptualization of subsidiarity by which society is understood as ‘a complex series of networks, social interactions, relationships and responsibilities’ (Spicker, 1991:4). In line with this view, the principle of subsidiarity is ‘justified as an expression of the responsibilities that people have for each other’s welfare’; responsibilities that nevertheless depend on ‘the closeness of their relationships’ (Spicker, 1991:4). Following this logic, we have to regard the ‘role of public services’ basically as ‘subsidiary to that of the family, the local community and the private sector’ (Spicker, 1991:4), as they are all entities located in proximity to individuals, and then, it is more responsible for providing social support in case of need. However, although support for the principle of subsidiarity can be seen as a ‘defence’ of individual freedom and personal independence, along with support for residual welfare (Spicker, 1991:4), the principle does not necessarily have to be understood in these negative terms. In fact, “subsidiarity” does not only refer to the idea of intervention ‘at second hand’, namely, ‘action to supplement (and arising from) incapacities and failings by the lower group’ because it is also connected with ‘the idea of necessary support and protection’, which implies ‘supplementary action as soon as the need for it make itself felt’ (Ranjault, 1992:49).

Nevertheless, it can be observed how in the case of Chile the principle of subsidiarity was adopted in its negative sense. As a result of the closest links between political and economic right-wing sectors in Chile, the Catholic conceptualization of subsidiarity supported by the ideologist of the 1980’s political constitution Jaime Guzman (1946-1991) was associated with ‘economic liberty’ as well as with the need to ‘reduce the size of the state’ understood as the best ‘antidote’ to the ‘sins’ produced by other ‘antagonist’ socio-political alternatives such as pure “liberalism” or “socialism” (Hidalgo et.al, 2016:64). Consequently, the adoption of a

“subsidiary state” in Chile implied a ‘restructuring’ of the size and faculties of the state in the country, meaning ‘to abandon the public provision of social services’ (Hidalgo et.al, 2016:65). In fact, the current political constitution of the country enacted under Pinochet’s military regime does not give legal recognition to social rights in Chile. In contrast, what is guaranteed by the country’s constitution is ‘the right to access’ to social goods and services provided by either public or private institutions (Martin, 2009:9). In this sense, rights are regarded mainly as ‘freedoms (of choice) rather than rights of provision by the state’ (Nash, 2011:100; in Vargas and Socías, 2016:191). In this context, state social action or public provision acquires a residual character that constitutes a distinctive element of “liberal welfare regimes” or, in the case of Latin America, is a feature of ‘the subsidiary role of the state’ (CEPAL, 2006:33). Either way, residualism or subsidiarity implies that states’ social responsibilities concentrate only in a few unacceptable risks, providing minimal guarantees of protection to the groups affected by them (CEPAL, 2006:33). As such, social policies oriented to extreme poverty constitute a key component of this type of welfare regime, as guided by a concern for population “needs” rather than citizenship “rights” (CEPAL, 2006:33).

What is at stake in the Chilean case is how even though the country has considerably expanded its welfare architecture and provided some minimal guarantees of social protection, the inclusionary and equalising potential of this social policy development is still severely undermined by the neo-liberal principles behind it. These principles obey the doctrine of “negative liberty” applied in Chile during the 1980s, which neglected the formal recognition of social rights, as well as the development of universal social policies that could contribute to their realisation. This neglect in the context of the classical liberal tradition informing neo-liberalism as a political and economic doctrine, is explained by the fact that rather than equality, and in particular socio-economic equality, the supreme value to protect is an individual’s liberty or freedom (Lister, 2010:224). In line with this view, rights are mainly conceived as protections of individual freedoms, following a conception of “negative liberty” under which to be free means not to be coerced either by being compelled to do something or by having to abstain from doing so, contradicting our individual will (Plant, 2003). This is precisely the negative doctrine behind neo-liberalism in which rights constitute ‘primarily protections against state interference’ (Molyneux and Razavi, 2003:6), which in turn explains the neo-liberal “hostility” (Lister, 2010) towards welfare and social rights. In fact, the critique of classical and neo-liberalism against “the welfare state” has been based on a perception that has regarded it as ‘a threat to freedom’ due to its ‘coercive’ nature since it ‘undermines property rights’ through taxation, and ‘reduces choice through its provision of benefits and services in place of the

market' (Lister, 2010:224–225). Thus, in line with the classical and neo-liberal tradition, it is civil and political rights, rather than social and welfare rights, that are the means through which 'a limited state guarantees the freedom and formal equality of the individual' (Lister, 2010:208) or, in other words, citizens' equality of status (Gaventa and Jones, 2002).

In terms of conceptualising citizenship, it is important to consider how for the liberal tradition citizenship constitutes mainly a 'status, which entitles individuals to a specific set of individual rights' (Gaventa and Jones, 2002:3). Even though for classical and neo-liberal traditions civil and political rights constitute the core of this status, from the perspective of the "social-liberalism" (Lister, 2010) or "civic liberalism" (Gaventa and Jones, 2002) underlying the influential theorisation developed by T. H. Marshall (1950), social rights represent a key condition for the full realisation of this status. As is well known, Marshall's definition of citizenship regards it as 'a status bestowed on those who are full members of a community'. Consequently, 'all who possess the status [of citizens] are equal with respect to the rights and duties with which the status is endowed' (Marshall, 1950:28–29). In terms of the rights included in this status, Marshall included "civil rights" (rights securing individual freedom), "political rights" ('the right to participate in the exercise of political power' directly or indirectly (vote)), and "social rights", which make reference to:

'...the whole range from the right to a modicum of economic welfare and security to the right to share to the full in the social heritage and to live the life of a civilised being according to the standards prevailing in the society' (Marshall, 1950:11).

By the inclusion of social rights into the citizenship status, Marshall was able to incorporate 'a positive notion of liberty into citizenship' (Gaventa and Jones, 2002:9); a conception that differs from the negative doctrine encouraged by neo-liberalism as it 'refers to 'freedom to' rather than simply 'freedom from' (Lister, 2010:228). In this sense, by developing a notion of citizenship able to combine both 'the theoretical and practical levels' of citizenship through the inclusion of the rights to welfare (Dwyer, 2000:51), Marshall was able to 'go beyond the formal rights of classical liberalism to conceptualize social rights as substantive rights' – that is, 'rights to the conditions, which enable the claiming of other rights' (Gaventa and Jones, 2002:9). Marshall was particularly concerned with the inequalities of class produced by the capitalist order, which in practice neglected the principle of equality on which the legitimacy of liberal-democratic regimes, as well as of civil and political citizenship, rested on. In light of these concerns, of relevance here is the place given by Marshall's theory to welfare institutions and social policies for the realisation of citizenship as an equal status – a central place, indeed,

bearing in mind how the 'incorporation of social rights to the status of citizenship' allows 'the creation of a universal right to a real income which is not proportionate' to claimants' market value (Marshall, 1950:323). In practical terms, what is at stake here is 'the decommodification of labour' that social and welfare rights are supposed to produce, particularly 'by de-coupling' citizens' living standards 'from their market value', so that they find themselves not completely 'depending on selling their labour power in the market' (Lister, 1997:17; in Gaventa and Jones, 2002:9). Following Esping-Andersen's definition (1990), decommodification involves evaluating to what extent social citizenship rights, along with the social policy structures associated with them, can provide 'alternative means of welfare to that of the market' so that, 'distribution is detached from the market mechanism' (Esping-Andersen, 1990:105–106). Nevertheless, as acknowledged by Esping-Andersen, the distributive and decommodifying effect produced by social citizenship is a critical issue in the field of welfare development as it implies choices between different social policy designs, with in turn different consequences for the practical realisation of citizens' equality of status as it is determined by each country's welfare development and architecture.

Overall, what is at stake here is the substantiation of rights, particularly of welfare rights, to assess their contribution to the realisation of "the ideal" that citizenship, as an equality of status, represents. In fact, following Marshall's theorisation, it has to be highlighted how his conceptualisation of citizenship, including social citizenship, must be considered as a normative argument or, in other words, as 'an ideal of what citizenship should be' (Lister, 2005:476) – an ideal that in Marshall's framework requires civil, political and social rights to fulfil the promise of citizenship as equality of status, but where the specific content or definition of this ideal is open to further elaboration. Indeed, to Marshall there is no 'universal principle' that defines, a priori, citizens' rights and duties, because the elaboration of an ideal image of citizenship constitutes a social construction by which societies can measure its own progress and success (Marshall, 1950:312–313). This normative dimension can be regarded as 'citizenship's inclusionary promise' (Lister, 2007) through which the historical development of citizenship has been criticised and also expanded to recognise previous excluded groups or disregarded social categories. As such, citizenship 'as always being understood as a quintessentially universalist concept' through which, as is the case in Marshall's theory, 'all citizens are deemed to be of equal status', and are expected to 'be treated the same, 'enjoying the same' set of rights and obligations (Lister, 2010:217). Nevertheless, in practice the institutionalisation of citizenship has involved a series of differences and exclusions in matters of recognition of and entitlement to citizenship rights in the case of particular social categories

such as women, disabled people, ethnic minorities and “the poor”, among others (Lister, 2010, 2007; Dwyer, 2002; Gaventa and Jones, 2002). Practical inequalities and exclusions have contradicted the universalist and inclusionary promises contained in citizenship as an equality of status, which have been particularly salient in the sphere of welfare and social policy where in several cases a ‘false universalism’ has prevailed that has neglected the particular and differentiated needs of diverse welfare users and claimants (Williams, 2000:339). In fact, it is important to acknowledge how social and welfare rights require that ‘humans, as interdependent social beings, make claims upon each other (...) based on shared experiences and constructions of need’ (Dean, 2013:32). This approach towards social citizenship understands it as ‘a multi-layered process of social negotiation’ that encompasses ‘the recognition and claiming of needs, the acknowledgement of claims as rights and the formulation of rights in specific social contexts’ (Dean, 2013:32).

Understanding that citizenship, and in particular social citizenship, constitutes an ideal based on universalist claims but with diverse practical implications in matters of decommodification, inclusion/exclusion and recognition of people’s needs in accordance with its institutionalisation in specific social contexts and welfare regimes, it is worth considering the citizenship implications of the contemporary expansion of social protection and social assistance policies in Chile, particularly for those groups targeted by these policies – that is, “the poor” (*los pobres*). Hence the focus is on the kind of “welfare citizenship” which these groups have access to and experience under today’s system of social protection in Chile. A more particular and context-specific inquiry that is able to acknowledge that although social rights ‘have not necessarily achieved universal status’, neither in Chile, nor ‘in the most developed welfare regimes’, it does not rule out the existence of a type of “welfare citizenship” that constitutes the way in which social rights ‘have been addressed – however imperfectly – through the development of various capitalist welfare state regimes’ (Dean, 2010:148). In line with this grounded and context-specific approach to citizenship and social rights, it is possible to better identify the complexities involved in the recent development of social policy in the region, particularly concerning the way in which these policies are attempting to somehow guarantee conditions of welfare inclusion for a sector of the population traditionally excluded from formal social protection. Although the expansion of social protection and social assistance policies targeted on sectors living in poverty in the region is symptomatic of the residual welfare regimes or subsidiary states established across Latin America, and therefore are a direct expression of both the erosion of social citizenship and the diminishing of universal social policies after “the neo-liberal turn”, it nevertheless represents a significant development if we consider the under-

development of social assistance policies prior to the 1980s in Latin America, an issue to be fully analysed in subsequent chapters.

Nevertheless, in the light of the welfare exclusion suffered by groups living in poverty or occupied in the informal sector prior to the 1980s, we can distinguish how the current expansion and institutionalisation of social assistance among the countries of the region constitutes, in fact, a significant 'break with the past' (Barrientos and Santibañez, 2009:3). In this sense, what changed is that social protection 'finally reached the poor, rather than merely the urban middle-classes' (Ferreira and Robalino, 2010:27), or organised popular sectors as was indeed the case in Chile (Foxley, Aninat and Arellano, 1977; in Vergara, 1978:30). This recent inclusion of groups living in poverty nevertheless constitutes a direct effect of the neo-liberal welfare reforms of the 1980s – reforms that in the case of Latin America and in particular Chile were justified by the critique raised by "neo-liberals" against the lack of redistributive impact of previous state social policies as they were biased towards middle sectors and the organised working class. Overall, it is a result of both the shortcomings of the previous social-insurance model to secure universal welfare inclusion and protection, as well as of the ad hoc neo-liberal criticisms arguing for a residual or subsidiary state that social assistance policies, particularly those targeted on groups living in poverty, have proliferated in the region. This proliferation of social assistance through targeted social policies that has been seen as particularly effective in reaching poor groups, as well as to promote a more "progressive" and "efficient" distribution of resources among the countries of the region (CEPAL, 2006:36). Yet, the distributive impact as demonstrated in the Chilean case is quite low, and has been unable to significantly alter the high levels of income inequality prevailing in the country.

The above considerations allow us to better identify the critical implications of the recent expansion of social protection, and particularly of social assistance policies in the region. Because even though this development can be seen as progress in terms of more or less securing the welfare inclusion of groups living in poverty, such an inclusion has happened under a residual welfare regime in which the decommodifying effect of social policy is quite minimal as access to welfare rights is determined by class stratification. In fact, what is characteristic of residual or liberal welfare regimes is a minimal decommodifying effect since the state encourages market dependency 'either passively, by guaranteeing only a minimum, or actively, by subsidizing private welfare schemes' (Esping Andersen, 1990:111), an image that corresponds with the situation among the countries of the region in which full "subsidiary states" are in place, as is the case of Chile. Under this type of welfare regime, it is not unusual

to find that the minimal guarantees provided by 'means-tested poor relief' or social assistance policies are not enough, nor are they intended, to secure alternative means of welfare from the market as they work only as 'a security blanket of last resource' in which benefits are low, and additionally are 'attached to stigma' (Esping-Andersen, 1990:106). What is at stake here is the quality of the welfare citizenship to which sectors living in poverty can access and experience under a residual or liberal regime as the one in place in Chile, considering its implications in terms of both social distribution and recognition.

According to Fraser (1995), one of the most critical issues concerning liberal welfare regimes is their affirmative redistributive effects, particularly through their stratified welfare structure, since they end up supporting and shaping class differentiation (Fraser, 1995:85). Indeed, as is often the case among liberal or residual welfare regimes, it is possible to find a dual social policy system organised in accordance with two different welfare channels: "social insurance programmes" for the stable employed; and means-tested programmes targeted at "the 'reserve army' of the unemployed and underemployed" (Fraser, 1995:85). Through this dual organisation, liberal welfare regimes leave 'intact the deep structures that generate class disadvantages' as their focus is only on the divisions 'between the employed and unemployed fractions of the working class (Fraser, 1995:85). This in part helps to explain the low redistributive impact of social policies under this welfare regime along with its high stratifying implications where social assistance policies played a determinant role. Indeed, in most of the cases, as argued by Esping-Andersen, means-tested social assistance policies are 'conspicuously designed for purposes of stratification' under this welfare regime (Esping-Andersen, 1990:108). As such, as these policies expose welfare recipients to punishment and stigmatisation, they can 'promote severe social dualisms', particularly among the different fractions of the working class (Esping Andersen, 1990:108). In the context of liberal or residual welfare regimes, then, it is not rare to find that one of the end results of this stratifying logic of social assistance is that the most disadvantaged class ends up being marked 'as inherently deficient and insatiable', stigmatisation that adds 'the insult of misrecognition to the injury of deprivation' (Fraser, 1995:85–86).

According to Lister, citizenship's promise of inclusion appeals not only to the 'access of formal rights' but also to recognition (Lister, 2007:3), and considers the moral implications of citizenship in terms of subject's formation and identification. Even though this represents a more recent development in terms of the ways in which citizenship has been further analysed and elaborated, it is important to realise, as stated by Morris (2012), that an element of

recognition was already present in Marshall's theory of citizenship. From Morris' perspective, Marshall can be considered a 'precursor to attempts to link rights and recognition' due to the relationship he established between rights and the recognition of citizens' 'equal social standing or status' (Morris, 2012:40). In this sense, the development of citizenship rights, and the constitution of social rights in particular, represented for Marshall the way in which societies could secure citizens' equal social worth. Consequently, considering that one of the fundamental principles behind social citizenship has been to afford 'every member of a society the measure of social recognition that makes him or her a full citizen' (Honneth, 2004:352), Honneth asserted that means-tested social assistance programmes do not 'suffice' because they would not secure to "welfare beneficiaries" 'the chance to participate in an elementary manner in the cooperative context of society by making his or own contribution' (Honneth, 2004:352). This refers to the problems of welfare dependency, and how it can keep beneficiaries outside the circuits of social integration – for instance, from participation in the labour market, one of the most valued spheres of citizens' contribution.

Indeed, part of the injuries of misrecognition and stigmatisation suffered by people living in poverty and/or welfare beneficiaries can be explained by the alleged lack of merits and contributions of these specific social categories to society. In this sense, as illustrated in the debates about welfare dependency and the so-called "underclass" carried out in the context of Western-developed countries, it is possible to observe how "the poor" or "the underclass" have been negatively depicted by their supposed rejection of 'the norms and values of mainstream society' (Morris, 1999:161), particularly in regards to 'the criteria of productive work/or family life form' (Dean and Taylor-Gooby, 1992:29). What is at stake here is the "second-class citizenship" of these disadvantaged social categories, something that has to do not only with material disadvantage but also, and critically, with the processes of misrecognition institutionalised in state social policies, and in the ways in which lower-income groups are represented by mainstream society. Considering the critical implications of means-tested social assistance policies or targeted anti-poverty programmes in terms of social recognition, it seems relevant to research the implications of the recent expansion and institutionalisation of social assistance policies in countries like Chile, particularly in terms of the impacts of these policies on the relative standing of people living in poverty, and overall, in regards to the citizen status of welfare beneficiaries in this country. As analysed above, much of the theoretical discussions and experiences of developed countries point to the shortcomings of social assistance policies in terms of both maldistribution and misrecognition. Nevertheless, what is the situation in the context of developing countries where the expansion

of social assistance policies is a recent phenomenon? This recent social policy trend has developed under the constraints imposed by a neo-liberal welfare regime and led to a change in the status of “the poor” (*los pobres*) in the welfare field – namely, from exclusion to inclusion. It is under these particular conditions and welfare trajectory that this research examines the kind of welfare citizenship that groups living in poverty and targeted by social assistance policies are experiencing in Chile. It is argued that only through the analysis and exploration of welfare beneficiaries’ experiences in the welfare field can we identify both the quality of the process of welfare inclusion of sectors living in poverty, as well as citizenship implications, particularly in terms of social recognition. Following these concerns, it is worth asking: whether and to what extent have social assistance programmes contributed to enhancing the citizenship status of “the poor” in Chile? This question is fully explored and analysed through the course of this investigation.

Conclusion

This chapter has analysed the contemporary development of social assistance policies in Chile in the light of the general social policy trends followed in Latin America since the 1980s onwards. By doing this, it explored the systematic growth and institutionalisation of social assistance policies, and how they aimed at securing some guarantees of social inclusion and protection, particularly targeting groups living in poverty and vulnerability. It was found that there was a significant break with the past as the recent emphasis on the social inclusion of these groups, particularly through welfare inclusion and protection, signals progress in the light of the historical conditions of welfare exclusion suffered by these groups under the welfare regimes that prevailed among the countries of the region prior to the 1980s. However, social policy progress has been limited as it has developed under residual welfare regimes or subsidiary states characterised by high levels of class stratification, and has had low impacts in terms of social redistribution – this was particularly salient in the current social assistance policies in the Chilean case. Nevertheless, as the contemporary expansion of social assistance policies has allowed groups living in poverty to move from welfare exclusion to welfare inclusion, it is worth exploring the particular citizenship implications that this recent social policy development could entail, particularly in terms of social inclusion and recognition. Specifically, as argued by this research, it is important to determine whether the significant expansion and institutionalisation of social assistance policies in countries like Chile has contributed to enhance or diminish the citizenship status of this population group. Following this goal, the next chapter will develop a broader literature review in order to analyse the

historical significance of the contemporary expansion of social assistance policies among developing countries. Based on that, it will then engage with the theoretical discussion about the citizenship implications of social assistance policies, including issues of class and gender stratification with the aim of identifying the impacts of these policies in matters of social distribution and recognition.

CHAPTER II

Welfare Inclusion through Social Assistance Policies: A Chance for Social Recognition?

Introduction

The purpose of this chapter is to explore and analyse the citizenship implications of the contemporary expansion of social assistance policies in Latin America, particularly in terms of social recognition. In order to do so, the first part of the chapter analyses the implications of the recent emphasis given to the social inclusion of “the poor” in the context of the historical and contemporary welfare trajectories followed in the region. It explores the welfare architecture under which the expansion of social assistance policies has taken place, thus highlighting the limits and scope of these policies, determining in turn, the quality of the conditions of welfare inclusion provided to the groups living in poverty among Latin American countries. The next section concentrates on the analysis of social assistance policies in general from an international perspective, considering the goals, historical development and reconfiguration of the policies after neo-liberal reforms. Based on this, the chapter engages with the scholarship regarding the current orientation of welfare programmes and anti-poverty social policies under neo-liberalism, considering how these policies constitute a source of misrecognition for the “welfare poor”. The chapter ends with a discussion about the implications of targeting and selectivity in matters of citizenship and social recognition, distinguishing the particular conditions under which selective social policies can contribute to the recognition of welfare beneficiaries as rights-holders.

1. “Social Exclusion” or the New Concerns for the Social Inclusion of “the Poor”

One of the main concerns of this research is to explore and analyse the citizenship potential of the contemporary expansion and development of social assistance policies in the Latin American region in order to identify the extent to which this recent welfare inclusion of people in poverty in countries like Chile has provided conditions of social recognition of this group as subjects of rights. To do this, it is necessary to identify first how the significant expansion of social assistance policies seeking to secure the social inclusion of “the poor” in Latin America since the 1990s has been driven by a new international concern for the problems of “social exclusion” identified initially among developed countries and then developing countries. Contemporary concerns for social exclusion date back to the 1970s, particularly among

European countries in the debates about “new poverty”, and later on in Latin America as a result of the increase in the levels of poverty and inequality during the 1980s. The term social exclusion has its origins on the publication of “Les Exclus” by the French, Richard Lenoir, in 1974 who used the term to describe the groups not protected by the welfare state among which it was possible to find the aged and the invalid, the mentally and physically handicapped, and the drug users, among others (Saith, 2001). Different from France, the concept of social exclusion in Britain has its roots on critical social policy and, specially, in the conceptualization of poverty developed by Peter Townsend (1928-2009) (Levitas, 2006). By 1979, Townsend argued that poverty should be understood not only as an issue of subsistence as it ‘should incorporate people’s inability to participate in the customary life of society’ (Levitas, 2006:124). From this perspective, it is found that rather than an absolute condition, poverty would be characterized by its “relative character” since it would constitute ‘a situation of social deprivation that is relative to the levels of participation’ prevailing in one specific social context or society (Savari, 2007:123). In this sense, exclusion from such “normal” levels of participation would constitute a direct consequence of poverty, an approach that would help to capture the ‘multi-faceted and processual character’ of poverty (Levitas, 2001:125).

Nevertheless, by the same period, Amartya Sen argued that the relative character of poverty was right when associated with an analysis focused on resources, although the absolute character of poverty was determined by the “capabilities” people have to satisfy an absolute set of basic conditions or functionings (Savari, 2007:23-24). From the perspective of capabilities, poverty is seen as the absence or deprivation of basic capabilities for doing and being (Sen, 1992). In this sense, the notion of capabilities points mostly to ‘individual’s substantial freedoms (...) to achieve the lives they have reason to value’ (Graf and Schweiger, 2013:284); freedoms that nevertheless depends heavily on the societal arrangements that support or not the development of basic capabilities. In fact, what is critical under the capabilities approach is ‘the real or effective (in contrast to formal) opportunities people have to lead life they have reason to value, i.e., to do the things they want to do, and be the person they want to be’ (Robeyns, 2003:545). In this sense, it is an approach of opportunities that requires to be sensitive to ‘the variations in need’ existing among people, as the deprivations of capabilities suffered by different individuals vary in accordance which a series of factors, some of them ‘physical’, and some of them ‘social’ (Nussbaum, 2000:228).

Apart from the links between the emergence of the concept of social exclusion with the discussions about the best way to conceptualize poverty, it is possible to identify different political discourses that shaped public understandings about social exclusion. In the context of the public discourses circulating in Britain and the European Union during the 1990s, Levitas was able to identify three competing understandings of social exclusion. First, a “redistributive discourse” (RED) based on critical social policy where social exclusion was depicted as a problem determined by ‘lack of resources’ including lack of both: ‘money’ and ‘access to collectively provided services’ (Levitas, 2001:125). Second, “the social integration discourse” (SID), the dominant discourse in Europe during the period, under which social exclusion was understood as ‘labour exclusion or lack of paid work’ (Levitas, 2001:125). Finally, the third one was the so-called “the moral underclass” (MUD) which explained social exclusion as the result of ‘the imputed behavioural or moral deficiencies’ of certain problematic social groups (Levitas, 2001:125).

As we can expect, behind the discourses about social exclusion there is an ‘implicit’ reference to its ‘opposite’: “social inclusion” (Lister, 2004:78-79). In the context of contemporary social policies, social inclusion has frequently been used to refer to ‘social integration, primarily through paid work’ (Lister, 2004:79). To Levitas, the emphasis given by European international bodies and national governments to social integration as labour participation is representative of a ‘Durkheimian’ discourse that treat ‘social (...) divisions endemic to capitalism as resulting from an abnormal breakdown in the social cohesion which should be maintained by the division of labour’ (Levitas, 1996:7). “Social cohesion”, in turn, constitutes another term used to refer to social inclusion among international bodies such as the European Union to refer to the need of “compensating” weaker’ members of society ‘for the adverse effects of market integration’ (Silver, 2010:196) from a more “solidaristic” or “republican” view. In fact, it is possible to identify different conceptions of social inclusion in accordance with distinct political traditions as under a “liberal framework”, social inclusion implies to offer equal opportunities and eliminate discriminations without threatening individual freedoms, and from a Republican or Social Democratic conception, social inclusion is associated with notions of social solidarity supporting redistributive policies (Silver, 2010:195-196).

At this point, however, it is relevant to identify how the articulation between the concepts of social inclusion and exclusion has a particular historical trajectory in the Latin American region. In fact, the emphasis given to the social inclusion of people in poverty under the new concerns for social exclusion came to express some “continuity of the social question” in the region (Savarí, 2007), and the debates about marginality during the 1960s pointed precisely to the deficits of social integration that prevailed across Latin American countries during this period. In this sense, concerns and discussions about social exclusion in the region have a much longer history, considering the fact that previous to the structural reforms of the 1970s and 1980s, all the countries of the region ‘failed to secure market and social incorporation simultaneously’ (Franzoni and Sánchez-Ancochea, 2014:279). Deficits of social integration were explained, on the one hand, by the conditions of structural heterogeneity that characterised the economies of the region under the “import substitution industrialisation” (ISI)¹¹ model and included, among other things, high levels of urban informality. On the other hand, but in direct relation to the limits shown by the labour market to incorporate the whole of the economically active population, were the shortcomings of the “Bismarkian” systems of social insurance that prevailed among the countries of the region and created ‘occupationally fragmented schemes’ based on formal employment incorporation that in turn ‘excluded the urban and rural poor’ (Seekings, 2008:25; in Franzoni and Sánchez-Ancochea, 2014:230). Historical and structural problems of social integration among the countries of the region are worth analysing in this research considering how the problematisation of poverty during the 1960s in Latin America emerged in response to the problems of social integration observed in these societies, particularly those categories regarded as “marginal” or in today’s language “excluded”.

Here it is important to note that during the post-war period in Latin America prevailed a ‘conservative’ approach regarding poverty as it was expected that poverty would be ‘resolved gradually’ either through societies’ modernisation or through the ‘gradual incorporation’ of sectors living in poverty to the ‘wage regime’, and then to the institutions of social protection (Barba, 2009:19). In this sense, as pointed out by Roberts, the view that prevailed about

¹¹ Import substitution industrialisation or ISI constituted a regional version of ‘Keynesian economic management’ (Molyneux, 2008) promoted by the UN Economic Commission for Latin America and the Caribbean (CEPAL). In simple terms, the main goal of this development strategy was to replace imports with domestically manufactured goods (Taylor, 2006). The strategy reflected the thought of structuralist theorists of development, a tradition that flourished during the post-war period in the region under the auspices of CEPAL, and that postulated the necessity of active state intervention among developing countries in order to correct ‘widespread market failures and to promote the growth of domestic industries that would form the basis of national development and the creation of a modern nation’ (Taylor, 2006:71).

poverty was one that regarded it as a “transient problem” that eventually would be resolved through the expansion of the opportunities of access to the cities as well as by the self-help strategies developed by the sectors living in poverty to get work and housing (Roberts, 2007:202). More substantially, the imminent reduction of poverty was seen as something achievable to the extent that the countries of the region were able to expand both the number of formal jobs as well as the coverage of the programmes of social security (Roberts, 2007:202). Conservative and transitional views about poverty and the problems of social inclusion in Latin American societies exercised an important influence on the theorisations about marginality, particularly from the perspective of modernisation, and the supposed transit from traditional to modern societies happening in the region. According to this view, and following the thought of Gino Germani (1911–1979), marginality was associated with the problems of social integration experienced by emergent social groups, particularly rural migrants coming to the new urban cities, characteristic of societies in transit (Savarí, 2007:39). From this view, part of the difficulties experienced by these groups was explained by their own cultural traits, as people kept ‘rules, values and practices of the old order’ that were ‘inadequate to the emergent modernity’ (Savarí, 2007:39). From this cultural approach of marginality, then, an emphasis was given to the social and psychological factors that could impact negatively on the social mobility and adaption of the new social groups to urban life (Roberts, 2007:205). In accordance with this functionalist sociological approach about marginality (Ward, 2004), Germani defined poverty as the lack of participation ‘in the roles and benefits to which it is normatively expected that individuals have access to’ (Germani, 1973; in Roberts, 2007:205), including access to civil, political and social rights. Through the gradual access to these rights, it was submitted that “marginals” would become ‘active members of society’, which in turn would allow them to overcome ‘the debilitating effects of poverty’ as well as the consciousness about their marginal status (Roberts, 2007:205). As such, there was high concern for the negative implications of the so-called “culture of poverty”, which according to the American anthropologist Oscar Lewis (1914–1970) had a self-perpetuating and transgenerational character, keeping people outside mainstream culture (Roberts, 2007; Ward, 2004).

However, this conservative and modernising view about the gradual social integration of marginal and poor groups in Latin American societies was significantly challenged by more critical approaches emphasising the structural and economic factors behind the problems of marginality in the region. Here one finds “dependency theory”, which argued that marginality ‘did not represent a problem of lack of integration but rather the expression of the particular

forms of social integration developed under ‘dependent capitalism’ (Savari, 2007:39). From this economic perspective, marginality was not the product of a society in transit but rather the inherent functioning of dependent capitalism, and in this sense, the main discussion among scholars was to determine the role occupied by marginal sectors in the productive structures of the region either as an “industrial reserve army” or as a “surplus population” (Savari, 2007:39–40). Hence, one of the main concerns was the ‘growing separation’ observed between a small blue-collar elite and the large marginal mass (Ward, 2004:184); marginalisation that in turn began to show the inherent limits of the project of ISI to secure wider labour incorporation. In fact, several critics railed against the ISI model during the 1960s and 1970s as a result of its failure to secure the social integration of the rural poor, to avoid the growth of urban poverty, unemployment and under-employment, as well as to reduce wealth and income inequality (Barba, 2009:20). By the 1980s, new critics emerged against ISI, but this time their critiques were based on ‘orthodox perspectives focused on the market’ (Barba, 2009:20). According to this view, the most critical problem with the ISI model was the level of macro-economic disequilibrium produced by ‘excessive state interventionism and protectionism’ (Barba, 2009:20). Pro-market critics prevailed, as already analysed in the Chilean case, and structural reforms and the adoption of neo-liberalism became the new economic doctrine guiding the contemporary strategies of development among Latin American countries.

During the 1980s, and in the context of the “debt crisis”, Latin America adopted a ‘neoliberal approach of outward growth with fiscal discipline’, in the belief that the benefits of economic growth ‘would be distributed gradually among the population’ (Cecchini and Martinez, 2012:26), making direct reference to the well-known ‘trickle-down’ effect or “*chorreo*”. However, three decades later, neoliberalism’s promises still had not been fulfilled, as seen in the region’s lack of ‘substantial improvement’ in matters of economic growth, employment creation, jobs quality, poverty and inequality reduction (Barba, 2011:68). Under these conditions, it is now recognised and accepted that economic growth does not guarantee “virtuous automatism” in matters of poverty reduction (CEPAL, 2006). These have been the conditions that have determined the contemporary concerns for social exclusion in the region, which in turn encouraged the systematic development of anti-poverty social policies aimed specifically at the social inclusion of people in poverty. This concern, as demonstrated above, is not new in the region. It merely highlights the structural problems of social integration prevailing in Latin American societies, and emphasises the excluding trends produced by the neo-liberal model of development, particularly in terms of labour inclusion, employment stability and guaranteed

social protection. Nevertheless, what is new about this widespread concern for social exclusion is precisely the new agenda of social policy that has emerged since the 1990s to somehow tackle it – something that in itself constitutes a significant difference from the past.

2. From Welfare Exclusion to Inclusion through the Expansion of Social Assistance: Recent Trends

In contrast to the substantial debates and theoretical discussion about the conditions of “marginality” suffered by the poor in the context of ISI and under the Bismarkian systems of social insurance, there was significantly less discussion and action in regards to the lack of alternative, non-contributory welfare channels available for the groups excluded from contributory social security during this period. This is one of the most significant shortcomings of ‘the partial model of welfare state’ developed in the region during the period of ISI, which apart from the problems of labour informality impeding the access to social security entitlements, did not provide special attention to particular social categories such as ‘women, the poor, and in general, families’ (CEPAL, 2006:34). Considering the substantial absence of non-contributory benefits and social assistance policies targeted at these social categories as explored in this research, it can be argued that the conditions of marginality experienced by the poor in Latin America under ISI were not only determined by their marginalisation from the formal labour market but also from welfare and social citizenship.

The above can be explained taking into account that under the systems of social security that prevailed in the region prior to the 1980s, formal employment, as argued by Barrientos (2009), ‘acted as a gate keeper to accessing to welfare institutions’ (Barrientos, 2009:89). This pivotal role assigned to formal labour participation has to be understood in the light of the model of “welfare state” followed in the region in which ‘social citizenship should be linked to labour citizenship’ under the paradigm of “the work society” (“*la sociedad del trabajo*”) envisioned by most of Latin American countries during this period (CEPAL, 2006:34). However, as discussed above, this model was always “partial” in the region as it depended heavily on full (formal) employment, something that was not achieved under the ISI model. In practice, this partiality obeyed the “hybrid” character of the welfare regimes that existed prior to structural reforms, which according to Barrientos can be better described as “conservative/informal” (Barrientos, 2009). Following Esping-Andersen’s typology of welfare regimes (1990, 1999), Barrientos asserts that the characteristic form taken by the welfare regimes of the region can be identified as “conservative/informal”, as social policy ‘relied on stratified social insurance and

employment protection supporting families through a male-breadwinner [model]' (Barrientos, 2009:92) – all features that would correspond to the main characteristics of those “conservative welfare regimes” identified by Esping-Andersen among developed countries. Nevertheless, in the Latin American case, this predominant welfare architecture was also “informal” as social protection ‘applied to workers only’, excluding those in informal employment who had to rely ‘mainly on their households and the labour market as the main sources’ of welfare and social protection (Barrientos, 2009:92). They relied only on those two sources because there was not much development of ‘means-tested assistance programs’ (Barrientos, 2009:92) among the countries of the region prior to the 1980s.

Based on this more grounded and specific analysis about the dynamics of social integration prevailing in Latin American societies before structural reforms, it is possible to distinguish the specific implications of such transformations, particularly those related to welfare and social citizenship, and associated with the conditions of social exclusion/inclusion of the poor in the region. In this sense, during the late 1980s and 1990s there was a shift in the characteristic form taken by the welfare regimes of the region moving from its “conservative/informal” modality to a new “liberal/informal” one (Barrientos, 2009). In fact, as happened earlier in Chile, the fundamental welfare and labour market reforms associated with the processes of structural adjustment involved ‘the dismantling’ of employment protections associated with social insurance, being replaced by individual savings plans offered by private providers, along with the offer of private health insurance (Barrientos, 2009:92). These transformations together signalled the gradual adoption of a ‘residual welfare model’ in the region in which ‘the market’ was established as the main ‘axes’ of production and distribution of social welfare (Barba, 2004:51). What is important to highlight here is how due to the hybrid character of the welfare regimes existing prior to structural reforms in the region, changes in welfare provision ‘applied more directly to workers in protected employment, and involved little change for the rest of the population’ (Barrientos, 2009:99) or for those outside the formal labour market. As a result of the “new forms of social assistance” that emerged during the 1990s, there was a modification of the informal component so prevalent in the “old” and “new” welfare regimes of the region (Barrientos, 2009). In fact, the contemporary development and expansion of social assistance policies across Latin American countries has meant the introduction of ‘forms of social protection not grounded on sectoral labour market attachment’ (Barrientos, 2009:99), something that in turn has provided exceptional conditions for the inclusion of people living in poverty in the emerging welfare regimes of the region.

According to Barrientos, one of the most critical factors leading to the recent expansion of social assistance in Latin America has to do with labour informality, which according to the records provided by the International Labour Organization (ILO) indicated that by 2001, one in two workers in the region depended on informal employment, while only one in four regularly contributed to social security (Barrientos, 2012:68). As such, the problems of labour informality so characteristic of the region have worsened since the structural reforms of the 1980s as they led to a growth in the informal economy, encompassing jobs characterised by lack of social protection and lower income levels (Valenzuela, 2005). In fact, based on ILO records, the informal economy accounted for 46.7% of urban employment creation in Latin America by 2003, 3.9% more than in 1990 (Valenzuela, 2005). This high percentage of labour informality in the region remained constant in subsequent years, and by 2010 over half of the workforce in Latin America and the Caribbean were employed in the informal sector, ranging from almost 40% in Chile to close to 75% in Bolivia (Ferreira and Robalino, 2010:8).

Under the above conditions, the expansion of social protection to cover those sectors excluded from social security as a result of their precarious labour inclusion was, as argued by Barrientos, a 'logic[al]' and much-recommended move in terms of social policy development (Barrientos, 2012:68). As illustrated by the Chilean case, the formula followed in the region to expand the coverage of social protection included the growing development of social assistance programmes, along with the inclusion of non-contributory social security channels. In fact, according to the classification developed by Ferreira and Robalino to analyse the "dramatic" development of social assistance in the region during the last decades, two types of social programmes can be regarded as the most characteristic forms taken by social assistance today: non-contributory social insurance, including social pensions and health insurance; and conditional cash transfers programmes (CCTs). Regarding the development of non-contributory schemes of social insurance, social pensions were established in countries including Brazil, Bolivia and Chile, while Colombia and Mexico developed non-contributory health insurance programmes (Ferreira and Robalino, 2010). According to Franzoni and Sanchez-Ancochea, this expansion in the coverage of social security contributed to providing better conditions of 'social incorporation' among the countries of the region, particularly for those population groups depending on the informal sector (Franzoni and Sanchez-Ancochea, 2014:283). In fact, based on ILO records, these authors identified how the percentage of non-wage-earners with access to non-contributory health and/or pensions benefits increased from 28% to 47% between 2000 and 2009, while the access to these benefits among domestic

workers increased from 30% to 40% during the same period (Franzoni and Sanchez-Ancochea, 2014:283).

Apart from the widening of the coverage of social security protection through non-contributory schemes, the contemporary expansion of social assistance in Latin America has been characterised by the establishment of large-scale CCTs programmes since the 1990s. As identified in the previous chapter, CCTs can be regarded as ‘the prevalent model’ of income support in the region (Ferreira and Robalino, 2010:11), providing cash assistance to poor families conditional to the meeting of specific requirements associated with children’s school attendance and health care controls. According to Rawlings (2004), CCTs constitute a significant departure from traditional forms of social assistance in the region as these programmes are based on a methodological design that combines the short-term goal of providing income, with the longer-term goal of accumulating human capital in order to break the intergenerational transmission of poverty. Apart from this “innovative approach”, CCTs differentiate from traditional forms of social assistance particularly due to the market principles through which they operate since these programmes constitute “demand-side” interventions that provide direct support to “the poor” rather than indirect “supply-side” mechanisms such as investment in health centres and schools or the provision of general subsidies (Rawlings, 2004). Here it is important to consider how CCTs have developed precisely in response to the shortcomings of traditional supply-side interventions based on school and health provision ‘to effectively reach the poor’ (Rawlings, 2004:4). In this sense, there was evidence about how these services remained ‘underutilized’ by the poor as a result of the ‘opportunity cost’ associated with the use of health and educational services (i.e. cash spending, difficulties of access), along with ‘the lack of incentives’ for poor families to invest in children’s human capital (Rawlings, 2004:4). As a result, by 2010 large-scale CCTs were established in 15 Latin American countries, absorbing ‘a significant share’ of countries’ social assistance expenditures, with budgets ranging from 0.1% of GDP in Chile and Peru to 0.6% of GDP in Ecuador (Ferreira and Robalino, 2010:20). By the same year, CCTs’ coverage varied from 1.5% of the population (in El Salvador) to 54% (in Bolivia) (Ferreira and Robalino, 2010:20).

The above developments illustrate Latin America’s social assistance “quiet revolution” (Barrientos and Leisering, 2013) through which the region left behind “the disparate collection” of general subsidies and feeding programmes associated with the distribution of scarce resources that on several occasions did not reach the poor to encompass more comprehensive forms of welfare support (Ferreira and Robalino, 2010). A significant

development that made it possible 'to claim' that the majority of "the poor" in countries like Brazil, Chile and Mexico were in receipt of one or more social assistance programmes developed 'with the specific goal of redistributing income and opportunities' to this particular section of the population (Ferreira and Robalino, 2010:24). This is what the contemporary welfare inclusion of people living in poverty looks like, which in turn has important implications in terms of social citizenship. It is therefore important to consider how the expansion in the offer and coverage of social assistance was associated with a better level of institutionalisation, thus representing a significant improvement in terms of state accountability in matters of welfare provision towards poor people. In this sense, as noted by Rawlings in the case of CCTs, the direct administration of both the programmes and the methods of identification and selection of welfare beneficiaries by central governments allowed a more direct relationship between state and recipients that would be not so much mediated by local bureaucracies with their possible discretionary actions. Institutionalisation and formalisation of social assistance is not a minor issue in Latin America, considering how the delivering of social assistance programmes to the sectors living in poverty has been 'historically' associated with different forms of 'political patronage', being perceived by receptors as 'a "favour" handed to them by beneficent politicians rather than as an obligation of the state' (Hunter and Sugiyama, 2012:10). In addition to this trend of institutionalisation of social assistance, it is possible to identify the incorporation of a discourse of rights framing the new generation of anti-poverty programmes and CCTs in the region, making direct reference to the access and provision of minimal social guarantees (Leisering and Barrientos, 2013:60–61). As a result of this institutionalisation and discursive framing, social assistance and cash transfers contributed, following Leisering and Barrientos, to create a perception of benefits as entitlements, which in turn helped to prevent the stigmatising effects associated with participation in social assistance programmes among the countries of the "Global South" (Leisering and Barrientos, 2013:60–61).

Notwithstanding these benefits, several shortcomings can also be identified associated with the recent expansion of social assistance in contemporary Latin America. Perhaps, one of the most critical issues is the level of disconnection existing between the systems of social insurance and social assistance among the welfare regimes of the region. This disconnection that, as argued by Ferreira and Robalino, can be explained by the fact that both systems 'remain separate' since social insurance is contingent on people's labour market status, while only those who are not eligible for social insurance because of lack of social security contributions can access "replacement" benefits associated with social assistance (Ferreira and Robalino, 2010:25). As a result of this disconnection, the whole system of social protection

ends up operating in practice as ‘a tax on formal sector employment coupled with a subsidy on the informal sector’ (Ferreira and Robalino, 2010:25). This functioning introduces a series of distortions in matters of labour relations as it ends up making ‘labour expensive vis-à-vis capital in the formal sector’, and making formal sector employment ‘less attractive’ for certain categories of workers who through informal employment can access a series of subsidies from social assistance programmes (Ferreira and Robalino, 2010:25). As argued by Barrientos, there is a clear ‘need of major integration’ between social insurance and social assistance in the region since even though the current expansion of social assistance has contributed to extending the coverage of social protection to those sectors ‘traditionally’ excluded from social security, this expansion has been guided towards a ‘socially segmented configuration of the components of social protection’ (Barrientos, 2012:77–78). As a consequence of this segmented organisation, it is possible to identify ‘a double set of institutions’ through which social security contributors can access better quality and highly subsidised protection, while those who depend on low-income and informal jobs have access to much more limited social protection through social assistance (Barrientos, 2012:77). In this sense, notwithstanding the fact that the contemporary development of social assistance has contributed to reducing the “truncated” character of social protection in the region, it has been achieved at the expense of an ‘aggravation of the segregation of social protection’ (Barrientos, 2012:77).

As illustrated in the Chilean case, it is precisely the current levels of segregation characterising the systems of social protection in the region that has become an object of concern, particularly in the debates about the redistributive impacts of today’s residual and targeted social policies. As analysed in the previous chapter, even though social policy targeting is supposed to have a short-term redistributive impact, the ‘indefinite extension’ of this redistributive mechanism ‘is not the best option to progress towards more egalitarian societies’ (CEPAL, 2006:36). What is at stake here is the high risk of establishing ‘a segmented regime’ of social protection of differential quality for “the poor” and “the rest” (CEPAL, 2006:36) – a risk that under the liberal orientation of the residual welfare regimes prevailing in the region is very high considering how the stratification orders that emerge from liberal welfare regimes are characterised by ‘a relatively equality of poverty among state welfare recipients’, along with ‘market differentiated welfare among the majorities’ (Esping-Andersen, 1990:111). In the context of Latin America, one of the most critical and discussed issues in regards to this new welfare modality is the degree of reproduction of social class stratification. This has to do with how the segregated welfare model ‘ends up very often consolidating dual models’ according to two schemes of social provision: on the one hand, the market scheme ‘(with and without

state subsidy) for middle and high social sectors'; and the state scheme, 'of low quality and with problems in the selection criteria for choosing among the poorest sectors' (Filgueira et al., 2005:2019). Apart from this class differentiation, it is observed that under this welfare regime there 'is a wide layer of low-middle groups that do not have enough resources for buying services in appropriate quantity and quality in the market, neither are chosen by the targeted-state programmes' (Filgueira et al., 2005:219). Moreover, what seems to emerge from this residual and dual welfare regime is a 'stratified citizenship' (Filgueira, 2005). What is critical to observe here is how the contemporary welfare inclusion of "the poor" in countries like Chile has precisely developed under this segregated welfare model, which leads to the question about the quality of this welfare inclusion, as well as its impact on the citizen status of "the poor" through the expansion of social assistance policies.

3. Social Assistance, Citizenship and (Mis)Recognition

Social Assistance Policies, Gender, and Development

According to Midgley (2019), social assistance can be regarded as 'a distinctive form of social protection' which is characterized by 'the use of means tests to determine eligibility to benefits' (Midgley, 2019:352). Means-tests, in turn, constitute procedures 'used to assess' beneficiaries' entitlement to social benefits in cases where either the income or the assets of individuals, households or groups 'fall below a specified level' (Midgley, 2019:352). In this sense, means-testing can be regarded as a technique 'for identifying people with limited command over resources' (Spicker, 2005:351). In the particular case of anti-poverty policies, the application of 'means tests of eligibility' requires the establishment of 'official poverty thresholds' in order to define 'who is poor and deserving of aid' (Silver, 2015:747). Whether associated with means or income-tested benefits or with the provision of a minimum income to specific sections of the population through categorical targeting — the goal of social assistance is to provide 'social protection for people in need' (Bahle, Pfeifer, and Wendt, 2010:449). Consequently, social assistance policies are targeted on particular categories of people facing a series of 'risks associated with the inability to work', including the cases of the elderly, the disabled, the unemployed (Silver, 2015:747), and the poor.

Although traditionally associated with the satisfaction of needs, and with the use of means-tests, it is important to highlight that, in reality, social assistance 'does not have a fixed or universal meaning' (Gough et.al, 1997:18). Actually, based on comparative research studying

social assistance arrangements across 24 OECD countries, Gough et.al identified by 1992 the existence of 8 different “social assistance regimes” in accordance with three main dimensions: extent (state social expenditure and population coverage), programme structure, and generosity (benefits levels) (Gough et.al, 1997:18). Consequently, the study was able to identify the following social assistance regimes: a) “selective welfare systems” (in Australia and New Zealand) where all benefits are means tested and associated with a wide range of categorical programmes; b) “the public assistance state” (in the USA), encompassing an ‘extensive set of means-tested benefits arranged in a hierarchy of acceptability and stigma’; c) “welfare state with integrated safety nets” (in Britain, Ireland and Canada) with large social support programmes articulated with social insurance, or based on means-tests or categorical targeting; d) “dual social assistance” (in Germany, France, Belgium and Luxemburg) which provides ‘categorical assistance schemes’ for particular groups ‘supplemented with a general safety net’; e) “citizenship-based but residual assistance” (among the Nordic countries (excluding Norway) and The Netherlands) encompassing a ‘simply general scheme’ with relatively high benefits levels but with a substantial role of local authorities based on social work and social care; f) “rudimentary assistance” (in southern Europe and Turkey) encompassing local and discretionary relief provided by municipalities and charitable organisations, along with national categorical assistance for some groups such as the elderly and disabled people; g) “decentralised, discretionary relief” (in Norway, Austria and Switzerland) with localized and discretionary relief, linked to social work and wider kin obligations; and h) “centralized, discretionary assistance” (in Japan) characterized by a long-standing and nationally regulated assistance system linked with a wider concept of family obligation (Gough et.al, 1997:36-37). To some extent, it is possible to observe a similar level of heterogeneity among the social assistance schemes prevailing among developing countries. Apart from the social assistance policies developed in recent decades in Latin America identified in previous sections, it is possible to observe the existence of a diverse range of social assistance schemes among the countries of the Global South including school feeding programmes, cash transfers, fee waivers and public works, among others, with some countries having ‘no fewer than 20 different schemes’ (Midgley, 2019:359). Overall, we found that by 2015, 157 countries had established schemes of social assistance, with a record of 1.9 billion people receiving benefits worldwide (World Bank, 2015; in Midgley, 2019:358).

In terms of relevance, it is possible to observe that social assistance is frequently regarded as ‘a residual part’ of the social security systems predominating among advanced welfare states since its coverage and expenditure rates are considerably lower than other areas of social

policy (Bahle, Pfeifer, and Wendt, 2010:449). Nevertheless, the lower relevance of social assistance is also explained by the distinction that prevailed during the post-war period among Western welfare states between ‘insurance against risks and assistance with current needs’ (Silver, 2015:748). Generally, social assistance benefits have been considered separate from the system of social insurance as the former would not share the latter’s focus on ‘addressing market failures or providing longer-term solutions to risk management’ (Rawlings, 2004:2). Notwithstanding the distinction between social insurance and social assistance policies, social assistance has been of great relevance for the constitution of welfare states considering how these policies have historically constituted the first relevant public social policy ‘that paved the way for welfare state development’ (Bahle, Pfeifer and Wendt, 2010:449). With the introduction of social insurance among developed countries by the late 19th century, the role of social assistance, and in particular of poor-relief measures, transformed significantly since more social groups began to be covered by employment-related insurance and universal benefits, turning social assistance into ‘a residual safety-net’ (Bahle, Pfeifer and Wendt, 2010:450). In fact, for the most part of the 20th century, social assistance programmes targeted on “the poor” ‘shrunk’ to cover discrete social categories such as the aged, the infirm and widows, all population groups that were not expected to participate in the labour market (Silver, 2015:748). Overall, this secondary role assigned to social assistance, particularly in matters of poverty reduction, was highly determined by the fact that under the system of social insurance, it was possible to cover temporary poverty among workers through contributions to insurance funds that would protect workers from destitution in case of job losses or accidents (Silver, 2015).

Nevertheless, beyond the historical separation and differentiation observed between the systems of social insurance and social assistance among developed countries, it is relevant to highlight the implications that this welfare bifurcation has had in terms of social stratification, particularly in the context of the development of the welfare state. Something that implies to identify, for instance, how, in the case of liberal welfare regimes, such separation helped to established a “dual welfare structure” through which “social insurance programmes” were reserved for the stable employed, while “means-tested programmes” were targeted at ‘the “reserve army” of the unemployed and underemployed’ (Fraser, 1995:85). Here is relevant to highlight that one of the main features of liberal welfare regimes is its orientation towards a ‘clientele of low-income, usually working-class, state dependents’ through its components of ‘means-tested social assistance’, along with ‘modest universal transfers or modest social insurance plans’ (Esping-Andersen, 1990:111). A dual welfare regime that apart from its “affirmative redistributive” effects in matters of class inequality has shown critical implications

in matters of gender stratification. In fact, while earnings-related social insurance systems based on 'contributions and standard employment careers' have been usually inadequate to 'the interrupted, low paid, working lives of women'; targeted social assistance has frequently subordinated "poor mothers" 'to demeaning and punitive procedures' when trying to access to welfare benefits (MacGregor, 2014:10). What is at stake here is how through the establishment of this 'two-track' welfare channel (which has been identified not only in countries like the USA but also, in a lesser extent, 'in most Western European countries'), welfare states have tended to be 'constructed in men's image' (Lister,1997:172). In other words, it has meant the enactment of 'individualised, labour-market related insurance programmes' where 'male recipients' are positioned as 'rights-bearers'; along with 'family-based means-tested assistance' programmes that have 'clientise[d] their primarily female recipients' (Lister,1997:172). A gender segregation and discriminatory treatment that implies to acknowledge the way in which gender has shaped the development and organisation of welfare regimes, a critical issue that is particularly evident when we consider the major dependence of women on social assistance and public welfare, a trend that seems to be present across both developed and developing countries.

As argued by Lister, it is possible to observe how as a result of women's disadvantaged economic position 'as a group', they tend to be 'more reliant on social security than men' (Lister, 2000:29). Higher reliance that seems to be explained not only by the major dependency of women on public services such as social housing but also by the "mediating" role played by women with welfare services as a result of their 'caring responsibilities within the family' (Lister, 2000:29). Nevertheless, the large-scale comparative study developed by Gough et.al about social assistance arrangements among 24 OCDE countries provides, following the authors, 'conflicting evidence' regarding the major predominance of women as the main recipients of social assistance (Gough et.al, 1997:28). In fact, while in Germany '62% of all claimants are women', exceeding the 55% in several other European countries, among the Nordic countries 'the share is slightly below a half' as a result of the wider offer of 'alternative benefits for women and mothers and the better provision for women in old age' (Gough et.al, 1997:28). The particular situation of Nordic countries can be understood if we consider, following Lewis (2000), the fact that 'women have typically gained social citizenship entitlements by virtue of their dependent status within the family as *wives*' the justification being a division of labour perceived to follow 'naturally' from their capacity to motherhood' (Lewis, 2000:39). In this sense, gender does not only shape the distinctions observed between social insurance and social assistance in terms of their benefits and beneficiaries, but also the way in which women

are incorporated into the whole system of social security as a result of their gender status and their roles as wives and mothers.

In the context of the Global South, it is possible to identify that, by 2015, many of the diverse social assistance schemes established among developing countries were targeted at 'women with children' (World Bank, 2015; in Midgley, 2019:359). For some scholars, this trend seems to suggest how the recent expansion of social assistance policies among developing countries would be 'fostering social justice by directing resources at poor women and their families' (Midgley, 2019:368). However, even though 'poor women have benefited from' recent social assistance policies such as categorical child allowance schemes and large-scale anti-poverty programmes, it is recognised that much need to be done in order to guarantee these social assistance policies 'empower women rather than reinforce traditional gender roles' (Midgley, 2019:368). What is at stake here is the "maternalist approach" guiding some social assistance schemes which fail 'to challenge patriarchal norms' (Midgley, 2019:368) because at the same time that these policies target 'women in their capacities as mothers', they neglect or leave in a secondary level the gender inequalities that determine women's poverty (Jones and Holmes, 2011:46).

In the specific context of Latin America, several scholars have analysed the effects that the recent expansion of social assistance policies, including non-contributory social protection measures, has implied for women's living standards and opportunities. A case in point is the recent development of "social pensions" which have reached 'significant number of women in close to 100 countries' (Razavi and Staab, 2018:80). From a gender perspective, it constitutes a relevant social policy development considering women's lesser access to contributory pensions as a result of 'their higher levels of informal and unpaid work' (Razavi and Staab, 2018:80). Although benefits are modest on average, and always lower than contributory pensions, they are significant for women, particularly for those from lower-income groups (Arza and Franzoni, 2018; Razavi and Staab). In terms of their contribution to gender equality, it is possible to find that apart from helping to reduce 'gender gaps in access', social pensions constitute 'women's own entitlement rather than one derived from their husbands' as is the case of widows' pensions (Arza and Franzoni, 2018:414). Additionally, as in some countries, women's social pensions include childcare credits, they seem to constitute a 'recognition of women's unpaid work', a positive effect that nevertheless can contribute to 'symbolically' reinforce 'the role of women as mothers and designated caregivers' as these credits are only directed at women (Arza and Franzoni, 2018:414).

The second case to analyse here is other of the emblematic social assistance policies developed during the last decades among Latin American countries particularly targeted at poor women: conditional cash transfer programmes. As already pointed in this document, CCTs constitute child-related transfers usually ‘directed at women on behalf of their children’ (Razavi and Staab, 2018:79). Granting cash transfers to women has been justified on a rationality that has attributed women a more efficient use of resources than men (Arza and Franzoni, 2018). In addition to the fact that women are made responsible for ensuring that the conditions associated with the granting of cash transfers are fulfilled (Bradshaw, Chant, and Linneker, 2018); it is possible to observe how CCTs have implied an instrumental incorporation of women in their status as mothers and care-givers (Martinez and Voorend, 2008; Arriagada and Mathivet, 2007). Instrumentalization that for Chant indicates how the recent “feminisation” of anti-poverty programmes in the region—making reference to the major participation of women in social assistance programmes— has led in turn to a “feminisation of responsibility and obligation” (Chant, 2008:176), that is, an increase in the reliance on women’s work to deal with poverty in neo-liberal times. In fact, since the 1990s women have received significant attention by development agencies, oriented towards empowering and investing in women as an efficient strategy to relieve poverty at the household and family level (Cornwall, Gideon, and Wilson, 2008). This “efficiency” argument is in line with neo-liberalism but also with neo-conservative conceptions of gender relations in which women tend to be subsumed ‘into the image of the protective mother’: a selfless and sacrificial representation of women that highlights their commitment to household survival and family wellbeing (Cornwall, Gideon, and Wilson, 2008:5). Considering that ‘investing in women’ has come to be seen as ‘one of the most efficient routes to ensuring wider development goals’ (Bradshaw, Chant, and Linneker, 2018:278), it is not rare to find how women have become the “main weapons” to alleviate poverty in the region, something particularly salient in the case of conditional cash transfer programmes.

As analysed in the previous chapter, CCTs, as well as ECEC, constitute both expressions of the “social investment perspective” which encourages a specific ‘logic for fighting poverty’ based on three principals: first, ‘learning as the pillar’ of economic and social development, a principle that is behind the relevance given to human capital development and pre-school education; second, ‘assuring the future more than ameliorating’ present conditions which in the case of anti-poverty policies imply ‘to break the intergenerational transmission of poverty’; and third, focusing on ‘child-centred interventions’ as this is beneficial for the community as a whole (Jenson, 2010:61). It is important to highlight that the social investment perspective was

developed as a 'response' to the consequences produced by neoliberal reforms across the world, representing a 'new social compromise' or 'middle way' between the "universalist" welfare state and the neoliberal model (MacGregor, 2014:12). In terms of its goals, we found how the social investment approach seeks to 'redirect' social policy interventions from '*passive* income maintenance (...) towards *active* labour market programmes', including 'new forms of training' following the logic of 'human capital investments', along with policies seeking to 'harmonize work and family life' (MacGregor, 2014:12-13). It is 'against this backdrop' that investing on children has become 'particularly attractive' on the assumption that significant 'returns' can be expected from children's cognitive development and skill accumulation which in turn are going 'to 'pay off' economically' at both the individual and community level (Staab, 2010:607). Nevertheless, 'as investing in children is concerned with care', it is relevant to highlight the gender implications of these type of social investment policies as is 'largely women' who have to borne 'the social costs' associated with this 'crucial and much neglected social function' (i.e. forgone earnings, financial obligations, career opportunities, among others) (Staab, 2010:608). A critical issue that in the context of Latin America has been widely discussed in relation to the recent expansion of conditional cash transfers programmes.

In fact, even though there is evidence about the ways in which some large-scale CCTs have contributed to enhance 'women's own economic security' and self-esteem through 'increased investment in assets', educational re-enrolment, and job searching, the evidence also points to the way in which CCTs have contributed to naturalize 'responsibilities for children as essentially women's work' (Razavi and Staab, 2018:80). What is problematic here is the fact that although CCTs seem to provide 'public credit' or social recognition 'to mothers and their work' (Arza and Franzoni, 2018:416), they expect specific contributions from women based on 'essentializing maternalist gender stereotypes' which frequently translate into 'increased labour burdens and the perpetuation of female altruism' (Chant and Sweetman, 2012:524). Critical outcomes determined by the fact that in the context of Latin America most of the social policy instruments focused on 'relieving child poverty and investing in children' usually depend on 'the (unpaid or poorly paid) work carried out by mothers or female community volunteers' (Staab, 2010:608). However, it is relevant to consider here how in the context of Latin America, women's welfare incorporation has been historically based on "maternalist assumptions" as women's entitlements have been granted 'by virtue of being a mother' (Molyneux, 2007:5). Consequently, it has been 'primarily in the interest of their children' that women have been entitled to welfare support, a gendered basis of entitlement that has constituted an 'enduring feature of poverty relief' in the region (Molyneux, 2007:5).

From the last, and adding to the recent interest on “investing in children” as part of the “social investment perspective”, it is not rare to find how women are positioned by contemporary conditional cash transfers programmes ‘as a means to secure programmes’ objectives’ (Molyneux, 2006:439). Under these programmes, then, poor constitute merely ‘a *conduit of policy* in the sense that resources channelled through them are expected to translate into greater improvements in the wellbeing of children and the family as a whole’ (Molyneux, 2006:439). Instrumental incorporation of women which even when showing high levels of continuity with the past, came to express contemporary logics of development based on ideas about “smart economics” seeking to ‘use women and girls to fix the world’ (Chant and Sweetman, 2012:523). Since the UN Fourth Conference on women in Beijing in 1995, the “empowerment of women” as well as “gender equality” began to be adopted as a goal by international development agencies with the aim of enabling women ‘to contribute their almost utmost skills and energies to the project of world economic development’ (Chant and Sweetman, 2012:523). This recent enthusiasm for investing in women guided by the logic of “smart economics” constitutes, however, a direct descendant of the ‘efficiency approach to women in development prevalent in the wake of the economic crisis of the 1980s’ (Chant and Sweetman, 2012:517). Indeed, if in the context of the implementation of structural adjustment programmes (SAPs) by the 1980s women constituted ‘the “invisible army” of crisis management’, in subsequent years they acquired major visibility being ‘identified as primary target of poverty relief policies’ including ‘microcredit’ programmes, ‘household transfers, and participatory projects’ through social funds (Molyneux, 2007:19). All actions justified by economic narratives highlighting women’s more ‘efficient and responsible’ use of scarce resources, based on a view of poor women as ‘hard-pressed mothers struggling for the wellbeing and betterment of their families’ (Cornwall, Gideon, and Wilson, 2008:3).

Welfare Reform, Targeting, and Social Citizenship

The gender implications of the current agenda of anti-poverty social policies in the region represent one of the critical factors behind recent discussions about the expansion of targeting as the key principle of social policy and welfare provision since the 1970s and 1980s which has changed the balance between social insurance and social assistance in both developed and developing countries. As a result of the “oil shocks” of the 1970s, welfare states were subject to significant change under conditions of higher unemployment, slower growth and population ageing – all factors that ‘raised fiscal concerns’ about how existing welfare protections were ‘unsustainable’ (Silver, 2015:748). One of the driving factors behind the

widespread adoption of selectivity over universalism was the fiscal constraints of the 1970s, which in turn opened the door for an 'ideological shift' towards targeting regarded as the 'most efficient and commonsensical thing to do' under conditions of "austerity" and globalisation (Mkandawire, 2005:2). According to Spicker, 'targeting is concerned with the allocation and distribution of resources' (Spicker, 2005:356). Even though it is frequently associated with 'poverty' or anti-poverty policies, targeting is a 'much broader concept' directly involved in 'service delivery' since 'any attempt to identify a client group specifically can be referred as "targeting"' (Spicker, 2005:356). Nevertheless, the narrow association that currently exists between targeting and poverty is explained by how this social policy concept came 'into vogue' in the context of 'supply-side economics and structural adjustment programmes' encouraging the development of social policies 'focused on the groups most in need' (Standing, 2007:514). In this sense, we found that 'targeting', as well as 'selectivity', are both representatives of the 'global trend towards "means-testing"' though which it is expected that the distribution of state support is reserved only for those cases where people have 'insufficient 'means' to support themselves' (Standing, 2007:514). Economic arguments about targeting which regard it as more efficient and less wasteful since means-testing would constitute, in fact, 'an efficient way to target resources' (MacGregor, 2004:20). A 'cost-effectiveness' argument in favour of targeting through means-testing that is based on the belief that 'the more accurate a subsidy in fact is in reaching the poor, the less wastage, and the less it costs to achieved the desired objective' (Sen, 1992:11). Nevertheless, the "lessons learned" from the use of targeting in real contexts indicate that 'identifying the poor with the precision suggested in the theoretical models involves extremely high administrative costs' (Mkandawire, 2005:8), to which had to be added how the processes of means-testing used to identify the deserving poor are 'often invasive and stigmatizing' (Mkandawire, 2005:14). What is worst, targeted budgets involve a 'discriminatory treatment' towards vulnerable populations 'as services for the poor are usually poor services' (MacGregor, 2004:21).

But beyond the technicalities associated to targeting, it is important to observe that the shift towards targeting and selective social policies was also guided by the rise of "the new right" and "neo-conservative" governments in several Western-developed countries by the 1980s and 1990s, which stressed core values representative of the "neo-liberal ideological position" such as individual responsibility along with a restricted role of the state (Mkandawire, 2005). As a result, neoliberal reforms such as those introduced early in Chile involved the reduction of social expenditure and benefit levels through the 'tightening of eligibility criteria', 'shortening terms for assistance' and the 'enforcing of conditions in return for public support' (Silver,

2015:748). These welfare reforms signalled a shift away from the principles of solidarity and social citizenship (Mkandawire, 2005) that guided the development and expansion of welfare provision and universal social policies. Here it is relevant to observe how the New-Right and the supporters of neo-liberalism developed a strong critique against social rights that did not just rest on the lack of economic efficiency of welfare policies, but also on the type of citizenship forged under such policies. The latter critique referred to the levels of “passivity” and “dependence” encouraged by welfare institutions, particularly among poor claimants (Kymlicka and Norman, 1994). In this sense, the welfare state’s critics were highlighting the side effects of social citizenship in terms of the detriment of civic and political citizenship. Then, instead of focusing on social rights, proponents of welfare reform sought ‘to re-emphasise the elements of duty and obligation’ that were also contained in Marshall’s theory of citizenship (Lister, 2005:489).

Up to this point, it is possible to approach citizenship from the perspective developed by Isin and Turner (2002) from which citizenship is determined by ‘three fundamental axes’, namely, ‘*extent* (rules and norms of inclusion and exclusion), *content* (rights and responsibilities) and *depth* (thickness or thinness)’ (Isin and Turner, 2002:4). Consequently, while the “extent” of citizenship refers to ‘how the boundaries of membership within a polity and between polities should be defined’, its “extent” is concerned on ‘how the benefits and burdens of membership should be allocated’ (Isin and Turner, 2002:4). Finally, the “depth” of citizenship would refer to the question about ‘how the thickness of identities of members should be apprehended and accommodated’ (Isin and Turner, 2002:4). Notwithstanding the complexity involved in the articulation and contestability of these elements, it is possible to identify how in mainstream debates about citizenship one of the most critical issues has been to determine ‘the balance between rights and obligations and the nature of each’ (Lister, 1997:13). A critical question that depends heavily on the citizenship traditions from which such a balance is determined. In fact, even when the origins of citizenship ‘denoted residence of a city’, and more accurately, ‘the status of free men from the Greek and Roman cities’, the modern concept of citizenship was shaped by the enlightenment principles ‘encapsulated in the French Revolution’ from which two different citizenship traditions emerged (Dean,2002:187). On the one hand, there is the “liberal or contractarian” tradition which gives supremacy to the principle of ‘individual freedom’ to be guaranteed by a ‘national social contract’ through which ‘sovereign power is negotiated between the individual and the state’ (Dean, 2002:187). On the other hand, there is the “republican or solidaristic” tradition which privileges the principle of ‘social solidarity’, subordinating individual’ sovereignty ‘to the need for mutual support and social cohesion’

(Dean, 2002:187). Based on that, it is possible to identify two different approaches towards the relevance of citizens' rights or responsibilities. First, there is the "rights approach" based on the 'liberal political tradition' where 'civil and political rights are the means' by which 'the limited state guarantees the freedom and formal equality of the individual' (Lister, 1997:13). The second approach corresponds to "citizenship as obligation" which is based on the 'more ancient civic republican tradition' where the 'civic duty' of 'political participation', along with the 'expression of the citizens' full potential as a political being' constitute the 'essence' of citizenship (Lister, 1997:13-14).

According to Dean, no one of the citizenship traditions identified above 'were *necessarily* concerned to accommodate the demand for social equality' (Dean, 2002:187). A critical issue that explains why throughout the twentieth-century discussions about whether the state should play a 'broader role in guaranteeing social rights' constituted one of the central citizenship debates (Lister, 1997:13). Although contested, it is possible to identify distinctive interpretations and alternatives elaborated by each of the citizenship traditions identified before in regard to this issue. In this sense, while the liberal/contractarian citizenship tradition 'may admit a concern with formal equality or the universality of individual opportunity', the republican/solidaristic tradition of citizenship is more concerned 'with substantive equality or a universality of social outcomes' (Dean, 2002:187). A concern for substantive equality that in the case of the republican tradition is justified on the fact that 'in order to be able to participate fully in public life' and in the political sphere, citizens need 'to be in a certain socioeconomic position' (King and Waldron, 1988:425-426). From this civic perspective, then, it is not possible to be an "active citizen" or to be a "participant" in "the polis" without a proper and public concern for the conditions of citizens, or, in other words, without considering 'their wealth, their well-being and their social and economic status' (King and Waldron, 1988:426). From the liberal tradition in turn concerns for equality and social rights vary in accordance with the negative or positive liberal doctrines underlying the arguments about this issue (Schuck,2002). Consequently, while liberal doctrines of "negative liberty" emphasize individuals' right to 'pursue their own projects free of state compulsion', doctrines of "positive liberty" consider that 'the state should act affirmatively' to guarantee a series of 'substantive entitlements (i.e. income, health care, and education)' that allow individuals 'to live the dignified, independent lives essential to their freedom' (Berlin, 1969; in Schuck, 2002:132).

Beyond the different approaches towards equality and social rights supported by both the liberal and republican citizenship traditions, it is possible to identify the interdependency that exists between the “civic”, “political”, and “social” elements of citizenship. This interdependence was contained in ‘the unified concept’ of citizenship elaborated by T. H. Marshall (1949) from which citizenship is depicted as ‘a complex relationship of rights’ (Lister, 2005:477). Rights which ‘are not rigid or mutually exclusive as categories’ (King and Waldron, 1988:420) but rather interconnected and interdependent. To Kymlicka and Norman (1994), this identification of citizenship with the possession of civic, political and social rights was representative of the so-called “postwar orthodoxy” through which the dominant understanding of citizenship was based on the conceptualisation developed by Marshall in 1949. As we know, Marshall’s theory of citizenship not only described the historical evolution and differentiation of citizen’s rights in England but also analysed the critical role played by these entitlements to forge ‘a sense of membership’ among individuals (Kymlicka and Norman, 1994:354). As analysed in the previous chapter, the basic premise underlying Marshall’s theory is that citizenship is a ‘status’ granted to the members of a community by which they are regarded as ‘equal to each other’ in terms of their rights and duties (Marshall, 1950:312). Among the three elements or set of rights contained in the conceptualisation of citizenship developed by Marshall, a central place was given to social rights whose characterization encompassed:

‘the whole range, from the right to the modicum of economic welfare security to the right to share to the full in the social heritage and to live the life of a civilized being according to the standards prevailing in the society’ (Marshall, 1950:32).

What is relevant to highlight in Marshall’s theorization of citizenship is how the inclusion of social rights came to reflect its crucial contribution ‘to class abatement’ (Crompton, 1998:72) during the XX century, at least in those countries where these rights developed, albeit with significant historical variations. Notwithstanding that, the important issue to highlight here is how, as a result of this contention or “mitigation” of class inequalities, what is created by the constitution of social citizenship is ‘a universal right to real income which is not proportionate to the market value of the claimant’ (Marshall, 1950:38). In this sense, social citizenship would entail, following Esping-Andersen (1990), ‘a decommodification of the status of individuals vis-à-vis the market’ (Esping-Andersen, 1990:105). Therefore, through this action of decommodification, what social rights granted to people is the access to ‘alternative means of welfare to that of the market’ as the distribution of welfare ‘is detached from the market mechanism’ (Esping-Andersen, 1990:105-106). Nevertheless, as acknowledged by Esping-Andersen, how to achieve and carry out this process of decommodification is a contested

issue in the context of welfare development, as it implies choices between different social policy designs with different consequences and implications about the citizenship status of individuals in society. As we know, much of the discussion about social citizenship has focused on which policies and welfare services qualify as proper social rights and which not, an issue that has concentrated in the debates about universal social policies, and selective and targeted welfare programmes.

Nevertheless, it is important to highlight here that decommodification is by no means the only and main criteria to judge the equalizing effects of social policies and their relative contribution to the realization of social rights. As pointed by feminist scholars, the 'presumed liberating effects' in terms of decommodification produced by social policies and benefits granted by different welfare states 'were largely enjoyed by male breadwinners who were in life-long employment' (Razavi and Staab, 2018:76). As we can expect, it was not the case of women who rather than join the labour market as formal workers remained in their households as 'unpaid domestic caregivers' (Razavi and Staab, 2018:76). What is at stake here is the fact that as a result of the sexual division of labour, 'a large share of women's work' has been not 'commodified' (Razavi and Staab, 2018:76) but rather "familiarised". Thus, apart from decommodification, it is relevant to consider how welfare arrangements and social policies contribute to the realization of social rights considering its degree of "defamiliarization" (Lister, 1997). In other words, 'the degree to which individual adults can uphold a socially acceptable standard of living, independent of family relationships, either through paid work or through social security provisions' (Lister, 1997:173). An important dimension that let us capture how some welfare regimes and systems of social policy contribute to 'reproduce gender roles', while others 'provide women with opportunities to reduce their dependency on both the market and the family' (Pribble, 2006:85). As exemplified by the debates about the impacts produced by the Latin American agenda of social policy on gender relations, the design of social policy matters as it has 'a profound impact on women's material wellbeing', but also 'on the societal formations of a woman's role as a citizen, worker and caregiver' (Pribble, 2006:85).

But beyond the differences associated with the access to and exercise of social citizenship, the belief in the centrality of the state and social rights to secure a status of equality among citizens is precisely what has been profoundly challenged and contested since the "neo-liberal turn". In fact, as identified by Lister (2013), social rights are more and more subject to conditions such as behavioural change, paid-work, selectivity (by the use of means-testing mechanisms) and exclusivity (by nationality). Together, these conditionalities neglect the

universal aspiration of social citizenship conceived by Marshall as an equality of status by separating out 'a group of individuals [...] who are deemed to be less than full members of society' either by what they do or don't do (Lister, 2005:489). It follows that instead of favouring a status of equality among individuals, the methods of selection and targeting characteristic of neo-liberal social policies, along with its stigmatising effects, helps to create, in practice, a different category of citizens.

A clear example of the above trends has been observed by Fraser (1993) in the US during the Reagan (1981–1989) and Bush Administrations (1989–1993). According to Fraser (1993), both presidencies developed a 'neoconservative political imaginary of "welfare"' in which poverty was no longer considered a social problem produced by lack of opportunities but rather a consequence of 'the culture of the poor' (Fraser, 1993:12). Under this ideological stance, 'structural explanations of poverty receded from the political culture [while] moral explanations moved to the centre stage' (Fraser, 1993:12). As a result, 'the ghetto poor' were portrayed negatively in accordance with stigmatising cultural features, supposedly encouraged by the previous welfare services and programmes available to "the poor". In order to tackle this "dependency culture", the Bush and Reagan Administrations re-introduced social divisions in the sphere of welfare that ideologically distinguished between those entitlements regarded as "contributory" (i.e. social insurance), and thereby legitimate, and those regarded as "non-contributory" – that is, a type of institutionalised "charity" 'of dubious legitimacy' (Fraser, 1993:12). As a consequence of this distinction, the second type of "welfare" was no longer considered a "right" but rather a "conditional benefit" to be granted following strict criteria of eligibility, as well as with specific "obligations" or responsibilities to be met by recipients. However, the US was by no means the single case in which dividing practices have been introduced in the sphere of welfare under the impacts of the neo-liberal ideology. In fact, similar trends were observed in the UK after the application of the New Labour agenda during the 1990s. In this case, Macleavy (2006) observed how, under a 'neo-liberal political climate in which levels of social citizenship were being put under continued attack from the New Right', the term "social exclusion" was introduced in the UK, serving as 'a nodal point for contemporary understandings of poverty, inequality, disadvantage and discrimination' (Macleavy, 2006:87). According to Macleavy, this concern contributed to the marginalisation of the 'notions of fairness and justice [through] the construction of a culturally distinct "excluded" minority as the major, legitimate focus of concern for governments' (Macleavy, 2006:87). In turn, this marginalisation contributed to both the "normalisation" of the inequalities existing among 'the "included" majority', as well as to the "rationalisation" of 'the privileges of the rich

and the struggles of the poor (...) through reference to an inclusive, meritocratic society' (Gillies, 2005:837). Under these conditions, it is not difficult to see how this new concern for social exclusion in the UK was accompanied by an explanation of poverty according to individual causes rather than 'structural processes'; making in turn an individual's 'economic contribution to society' (Macleavy, 2006:90) through labour participation the fundamental basis for the development of an active citizenship.

In the context of Latin America, targeting, along with the mechanisms of classification and categorisation of lower-income populations by current social policies, constituted one of the most contested issues related to the contemporary expansion of social assistance policies and anti-poverty programmes after neo-liberal reforms. From the perspective of Roberts (2007), this expansion of social assistance in Latin America contributed to the institutionalisation of poverty among the countries of the region, in particular through the categorisation of the population in different levels of poverty (i.e. "poor", "homeless") based on technical and impersonal criteria about people's needs (Roberts, 2007:207). Under targeted social policies poverty constitutes a 'quantifiable condition' that in order to be solved requires efficient measurement as well as efficient social policy' implementation and assessment (Roberts, 2007:207). A technical approach towards poverty through targeted social policies that can be seen as the direct result of 'the neo-liberal project' which uses these types of policies only 'to reduce' or 'to compensate' the adverse effects of the structural adjustments but without really constituting social rights (Ivo, 2004:29). It follows that targeting 'as the ruling principle' of social policies, constitutes an 'instrumental and operative' instance in the high selectivity of social spending. As a result of this logic, the treatment of the social question is 'depoliticized', reduced to something 'technical', which transforms '(universal) social rights into programmes and strategic measures' to distinguish, calculate and assign benefits to a group of individuals selected by the countless targeted social programmes (Ivo, 2004:33–34)

What is at stake here is, following Barba, the reduction of "the social" 'to the problems of poverty and social vulnerability' (Barba, 2004:51) in the region after the 1980s economic crisis, and the subsequent Washington Consensus. Consequently, the residual character acquired by public action meant that 'the role of social policy has been restricted to ensure' access to basic (minimal) resources to the poorest groups in order that 'each one can take advantage of the income opportunities proportionated by the market' (Barba, 2004:55). Under this logic, poverty is understood as a problem that can be attributed to 'deficiencies of individual character', an explanation that 'has helped to justify' the use of targeted mechanisms by which

the current social policies of the region operate. As a result of this logic, then, 'it is only legitimate to reassign resources through public means to those that apart from being in extreme poverty, are willing to achieve their wellbeing under market rules' (Barba, 2004:55). In this sense, 'assistance constitutes an individual attribute for those that "morally" have the right or potential to develop' (Ivo, 2004:32). This 'civilizing dimension' of contemporary anti-poverty social policies has been criticised by Latin American scholars, being considered as an integral part of the neo-liberal project by which a 'new market citizenship' is trying to be established among "the poor" (Schild, 2000; Dagnino, 2003). The critical issue here is how this neo-liberal project is based on an understanding of poverty as a problem of lack of skills and opportunities – namely, "individual-agency problems" that stop "the poor" 'from effectively participating in the market and becoming masters of their own destiny' (Schild, 2000:286). Overall, as argued by Dagnino (2007), under neo-liberalism 'to be a citizen is equated with individual integration in the market' (Dagnino, 2007:553). This view of citizenship in the case of Latin America seems to underlie the vast majority 'of "activating" projects' that seek 'to enable' "the poor" to 'acquire citizenship' through micro-enterprise or job training (Dagnino, 2007:553). Such "top-down" strategies in the sphere of welfare and social policy are aimed at creating 'the good [neo-liberal] citizen' – namely, individuals 'responsible for taking care of their own welfare and that of their family with minimal recourse to the state' (Lazar, 2012:341). This model constitutes the neo-liberal version of "active citizenship", closely related with the process of welfare individualisation and responsabilization imposed by welfare reforms in the region. This neo-liberal model of citizenship was behind the strategies of social protection developed in the region, which apart from seeking to secure minimal social guarantees for "the poor" and "the vulnerable", encompassed a clear emphasis on "activating" these social groups. In fact, either through conditional cash transfers that expected people to make human capital investments or through micro-finance programmes that expected beneficiaries to carry out independent labour projects, these programmes clearly appealed to the "agency of the poor" to be active in the fulfilment of their needs – an appeal particularly salient for poor women, the sub-category among "the poor" actually targeted by current social assistance policies as documented in previous sections.

Anti-Poverty Social Policies and (Mis)recognition

Based on the above discussion, it is possible to distinguish more clearly the injustices of distribution and recognition associated with the "neo-liberal orientation" of targeted anti-poverty social policies and welfare programmes. From the perspective of distribution, apart

from the fact that these social policies are lower in coverage and in the scope of benefits in comparison to universal social policies, targeting involves an approach towards poverty that is not representative of people's socio-economic conditions. As pointed out by Latin American scholars, these mechanisms of targeting in the region reduced poverty to something "technical", abstract and "impersonal", establishing arbitrary distinctions between population groups sharing similar socio-economic conditions. As a result of this technical and abstract approach towards poverty, in the case of CCTs welfare selection ends up disregarding specific features associated with the categories targeted by anti-poverty programmes as is the case of poor women. In this sense, it is possible to identify how even though targeted social policies have been justified in terms of short-term distribution towards "the poor", such an approach has important implications in terms of recognition as people's specific socio-economic conditions, as well as gender status, are disregarded and misrepresented by the functioning of social policies. Nevertheless, apart from these critical issues, the international discussion regarding welfare programmes has highlighted the moralising approach towards poverty and welfare beneficiaries prevailing after neo-liberal welfare reforms. This moralising approach as identified by scholars refers to an understanding of poverty based on individual explanations such as "the culture of the poor" or "welfare dependency" that neglects the structural factors and lack of opportunities responsible for people's socio-economic deprivation. Under this understanding, the introduction of individualising and responsabilizing methodologies in anti-poverty programmes and welfare programmes can be seen that have made welfare entitlements and benefits conditional to specific actions or behaviours associated not only with productive work but also with women's unproductive labour. Overall, these conditionalities represent the "activating" policies aimed at tackling poverty, welfare "dependency" and "passivity" among lower income groups needing and depending on social assistance and welfare support.

In light of the above concerns, one can see how social policy targeting is highly consequential not only in terms of social and welfare distribution but also in terms of social recognition. According to Fraser, "injustices of recognition" refer to cultural or symbolic injustices 'rooted in social patterns of representation, interpretation, and communication' (Fraser, 1995:71) that impede the ability of members of particular groups to participate in equal terms in social life. Following this view, recognition is a matter of social status that requires us to 'examine institutionalized patterns of cultural value for their effects on the relative standing of social actors' (Fraser, 2001:24). As such, it is possible to observe how targeting institutionalises different sets of cultural values about "poverty" and "the poor" that are highly consequential for

the representation of people's class positions and gender status, as well as for the interpretation of people's needs. This institutionalisation in turn has significant consequences for social identification and differentiation, considering the processes of classification and categorisation associated with social policy targeting. In fact, as argued by Jenkins (2000), the formulation and implementation of social policy of all kinds' (i.e. by NGOs, states or supra-national bodies) contributes significantly to social categorisation. As Jenkins (2000:19) stated:

[T]he targeting of resources and tributes at a section of the population which is perceived to have particularly urgent or specialized "needs", may call into existence a new social categorization, or strengthen existing categorizations.'

Social policy categorisations are consequential for people's lives, in the sense that they 'may emphasize the entitlement of those in question to receive resources', but equally 'may identify them as socially deficient, or lacking in some fashion, labelling them further as "underserving" or "troublesome"' (Jenkins, 2000:19). This highlights the implications of the process of external identification carried out by 'powerful, authoritative institutions', which have no 'counterpart in the domain of self-identification' (Brubaker and Cooper, 2000:15). Among such institutions the modern state 'has been regarded as 'one of the most important agents of identification and categorization' as it 'seeks to monopolize not only legitimate physical force but also legitimate symbolic force', including 'the power to name, to identify, to categorize, to state what is what and who is who' (Brubaker and Cooper, 2000:15). As Lamont et al. (2014) put it, 'through law and social programs, the state wields immense power in shaping and legitimizing systems of categorization', which is why 'the state is perhaps 'the most important institutional actor, which has considerable effect on the macro patterns of distribution of material and non-material resources, and on the recognition of diverse social groups' (Lamont et al., 2014:585–586).

In light of the above discussion, it is possible to distinguish more clearly the implications that the welfare inclusion of poor groups through social assistance and anti-poverty programmes entail in terms of social recognition. At a moral level, what is at stake in targeting is the identification of the "deserving poor", a process that 'is often invasive and stigmatizing' (Mkandawire, 2005:14). In fact, as a process of social identification and categorisation of "the poor" or of those 'who cannot fend for themselves', targeted social assistance, even when highly technical or sophisticated, can still produce a series of 'effects on [people's] self-respect as well as on the respect accorded them by others' (Sen, 1995:13). This is a critical issue in the discussions about social assistance policies that refer, in Sen's words, to the 'direct costs and losses involved in feeling – and being – stigmatized' when people are targeted and

selected by anti-poverty or social assistance programmes (Sen, 1995:13). In this sense, beyond the specific “contingency” given to these moral issues under the impacts of neo-liberal welfare reforms, the issue highlighted here is the fact that social policy categorisations and classifications have been historically implicated in the processes of “othering the poor” (Lister, 2004). In fact, as argued by Barba (2010), ‘the classification of the poor’ can be regarded as ‘the first instrument of social policy and social police’ designed to distinguish, among the population in poverty, ‘those that assumed the established value system and those that rejected it’ (Barba, 2010:28). In this sense, earlier social policy categorisations such as “the pauper” constituted, since the beginning, ‘a moral divider designed to protect the respectable from the morally undesirable’ (Lister, 2004:104). This division reflects, following Barba, the fact that in modern societies ‘poverty outside work was born stigmatized’ as it was seen as ‘potentially dangerous, criminal, seditious, unworthy’ (Barba, 2010:28). With more or less salience, these are the negative moral connotations associated with social assistance and welfare benefits for “the poor”, which vary, of course, in accordance with particular historical and national contexts.

According to Titmuss (1967/2006), one of the crucial factors behind the rise and establishment of “universalist social services” in the UK was the aim of ‘making services available and accessible to whole population in such ways as would not involve users in any humiliating loss of status, dignity or self-respect’ (Titmuss, 1967/2006:42). Through the emphasis given to citizens’ social rights, it was viewed as possible to prevent ‘any sense of inferiority, pauperism, shame of stigma’ among users of public social services (Titmuss, 1967/2006:42). This emphasis on universal social services as part of citizens’ social rights in the welfare trajectory followed in England was highly relevant considering the country’s pioneer role developing poor-relief policies since the Poor Laws in which the “workhouse” occupied a central place (Bahle, Pfifer and Went, 2010). As observed by Marshall (1949/2006), under the 1834 Poor Law Act, ‘the claims of the poor’ were not treated as an integral part’ of citizens’ rights but rather ‘as an alternative to them’ by which people in need had to forfeit ‘in practice their civil right of personal liberty by internment in the workhouse’, while forfeiting by law any political right they might possess (Marshall, 1949/2006:35). In the context of this discriminatory, humiliating and disciplinary treatment, the stigma associated to poor relief was no other than the expression of, as argued by Marshall, ‘the deep feelings of a people that understood’ that those accepting welfare-relief were crossing the road ‘that separated the community of citizens from the outcast company of the destitute’ (Marshall, 1949/2006:35). It is in contrast to this welfare treatment and its stigmatising implications that universal social policies, and in

particular, social rights were given prevalence over selective or targeted social policies. Nevertheless, as argued by Titmuss, the main problem in terms of social policy design and development is not a choice between universalism or selective social services, which in itself constitutes 'a naïve and oversimplified picture of policy choices' – the real challenge, one regarded as "positive" by Titmuss, is finding the ways of 'providing selective, high quality services' for people living in poverty 'over a large and complex range of welfare', of being able to 'positively discriminat[e]' them based on a group, territorial or 'rights' basis (Titmuss, 1967/2006:46). Overall, the crucial issue here is to determine

'what particular infrastructure of universalist services is needed in order to provide a framework of values and opportunity bases within and around which can be developed socially acceptable selective services aiming to discriminate positively, within the minimum risk of stigma, in favour of those whose needs are the greatest' (Titmuss, 1967/2006:46).

Apart from the complex analysis offered by Titmuss to assess the relative merits of selective social policies in the context of the broader organisation and provision of social services, it is relevant to observe how both Marshall and Titmuss emphasised the implications on social recognition, particularly in the light of the connection between welfare and social citizenship. As identified in the previous chapter, an element of recognition was already present in Marshall's theory of citizenship. This has to do with the relationship Marshall established between rights, particularly social rights, and the recognition of citizens' 'equal social standing or status' (Morris, 2012:40). In this sense, one of the critical issues involved in Marshall's theorisation about citizenship is the way in which the development of citizenship rights, including social rights, could secure citizens' equal social worth. The centrality given by Marshall to social worth, along with its implications for citizenship, was made clear when he analysed the proliferation of egalitarian policies in Britain by the end of the 19th century. According to his view, such proliferation was explained by society's wider acknowledgement of the fact that the 'formal recognition of an equal capacity to enjoy rights' or even the mere existence of 'equal natural rights' were simply not enough as principles of equality and social justice (Marshall, 1950:319). By acknowledging the shortcomings of this "formalist" or "legalist" conception of equality, it was possible to redefine equality in order to understand it 'as the conception of an equal social worth' (Marshall, 1950:319). From this perspective, it follows that even though the relevance of citizens' equal social worth justified the raising of redistributive policies and social rights, the underlying issue here was not socio-economic equality, because in Marshall's theory of citizenship, 'equality of status [was] more important than equality of income' (Marshall, 1950:328).

At this point, it is possible to argue how scholars' discussions and critiques about the new welfare agenda targeting poverty and social exclusion have been mostly concerned with the recognition element of social citizenship. Notwithstanding the constant redistributive critique against the features of welfare reconfiguration such as the diminishing of social rights, the privatisation of social services and the use of means-testing mechanisms, scholars' critiques have widely denounced the moral detriment produced by the new targeted social policies focused on 'abjected' social categories such as the poor, the excluded or the 'underclass' (Rose, 1996). In this sense, what is at stake in these discussions is how, as a result of the targeted and residual character of the new social policies targeting the poor, along with its normative agenda focused on fostering an active citizenship, these policies seem to be helping to construct a different status of citizens characterised not just by economic problems but also by moral failures. For some scholars, this social and symbolic construction represents an integral part of "the new governance of the social" brought about by the neo-liberal turn (Larner, 2000; Rose, 1996). Nevertheless, as argued by Fraser (1995), the policies of social distribution that have characterised liberal-welfare states have shown an affirmative character that more often than not has established clear distinctions between working and non-working citizens. According to Fraser, one of the most critical issues with these affirmative welfare policies is that they end up neglecting 'the universal conception of recognition', or in other words 'the equal moral worth' of individuals (Fraser, 1995:85) due to the stigmatising dynamics that characterise the administration as well as the reception of residual social assistance. These recognition-stigmatising dynamics constitute a critical issue for people living in poverty, considering that even though poverty 'is quintessentially the product of socio-economic injustice' and a problem of social redistribution, 'nonrecognition, misrecognition and disrespect' constitute typical experiences for those categorised as poor (Lister, 2004:37).

In terms of asserting the equal moral worth of people, social recognition is a critical issue for the case of people living in poverty and depending on welfare, considering the moral implications involved in the design and implementation of social policies that aim to tackle poverty and social exclusion. According to Lister, the assertion of recognition in these cases should imply first and foremost 'a sense of equality of status and respect', which is 'critical to the recognition of the full citizenship' of those groups living in poverty (Lister, 2004:41). Social rights have a critical role to play here, as they developed precisely to afford 'every member of society the measure of social recognition that makes him or her a full citizen' (Honneth, 2004:352). From Honneth's perspective, welfare institutions and social rights developed to help secure 'a minimum of social esteem and economic welfare independent of actual

achievement' (Honneth, 2003:149). Nevertheless, even when social esteem or social worth is somehow secured by welfare, it is also dependant on individual achievement, which refers to individuals' involvement in some kind of activity valued by society as has been traditionally the case of waged work. It follows that in terms of asserting social recognition, 'programmes of minimal economic safeguarding do not suffice' because they do not allow individuals to participate in 'the process of social cooperation' by which citizens might be able to gain social esteem according to their social contributions (Honneth, 2004:352).

Honneth's theory of recognition explored further the link between recognition and citizenship, highlighting the crucial role played by social welfare and social rights to accord each individual a proper measure of social esteem or worth in order to satisfy an individual's expectations of recognition brought about by the capitalist order. Under this order, following Honneth, social esteem began to be subjected to the 'achievement principle', which not just 'meritocracized' (Honneth, 2003:141) the conception of honour that characterised pre-modern societies, but also helped to institutionalise relations of recognition in which individuals learn to recognise 'themselves as subjects possessing abilities and talents that are valuable for societies' (Honneth, 2003:142). Based on the principle of achievement, the social recognition of individuals as full citizens has critically depended on citizens' social contributions since the development of modern-capitalist societies. This is especially salient when considering how distributional struggles associated, for instance, with the expansion of social rights constitute 'a specific kind of struggle for recognition in which dispute is about the appropriate evaluation of individuals' or groups' social contributions' (Honneth, 2004:352). This principle is critical to the recognition of "the welfare poor" as a subject of rights considering how the old and new debates about "welfare dependency" and the "underclass" portray a group characterised by the rejection of 'the norms and values of mainstream society', and highlight features such as 'state dependency, denial of the work ethic, the failure of morality, and the rejection of family norms' (Morris, 1996:161). This social category 'is always negatively defined' in the light of 'the criteria of productive work/or family life form' from which, for one reason or another, the 'residuum' or 'underclass' is excluded (Dean and Taylor-Gooby, 1992:29–30).

Overall, notwithstanding the relevance of the universal appeal of Marshall's theory of citizenship, the historic development of citizenship, particularly social citizenship, has gone hand in hand with several social exclusions and status differentiations. Such inequalities in the sphere of welfare, beyond their implications in matters of material deprivation, came to reflect the lack of social recognition suffered by particular social categories, such as women

and people living in poverty, which are based on the under-evaluation of their contributions to society. From this perspective, it is possible to observe how the welfare exclusion suffered by groups living in poverty in Latin America under the social insurance model constituted an injustice of recognition since this exclusion was justified on people's lack of social security contributions, which in turn were based on the predominance given to citizens' formal labour integration. In this sense, apart from neglecting the structural factors impeding all the population to integrate into the formal labour market, the values guiding the social insurance model did not provide equal social recognition to other crucial social activities, such as women's unproductive work and people's informal productive work. In the light of this, it is possible to argue that even when neo-liberal welfare reforms have involved an overall reconfiguration of social citizenship in terms of its scope and normative content, the contemporary expansion of social assistance policies and targeted anti-poverty programmes in Latin America might represent not only a chance of welfare inclusion (in differing degrees according to a country's welfare development), but more importantly, the possibility to be recognised as a subject of rights, despite the precariousness of this status under neo-liberal principles. This recognition depends on a series of critical factors. First, on how the processes of targeting and selection are carried out by social assistance policies, particularly in terms of inflicting or not any humiliating effect that could impact negatively on the social standing of welfare beneficiaries. Secondly, and highly relevant for what is being discussed here, it will depend also on the general welfare infrastructure under which social assistance policies have developed, a less attended issue by current scholars who have tended to study social assistance or anti-poverty programmes in isolation in circumstances where the general orientation and scope of these policies is determined to a high extent by the welfare regimes on which they are inserted. Thirdly, it will depend on the extent to which social assistance policies properly appreciate people's social contributions. These three issues are empirically explored throughout this research.

Conclusion

This chapter analysed the trajectory of welfare inclusion of the poor through the recent expansion of social assistance policies in Latin America in the light of the previous conditions of welfare exclusion that prevailed among the countries of the region prior to the 1980s' structural reforms. In doing this, it distinguished both the magnitude of the contemporary development of social assistance policies as well as its shortcomings, associated in particular to the type of welfare architecture under which these policies emerged. In addition, the chapter

engaged with the recent scholarship about the orientation of anti-poverty social policies and welfare programmes under the impact of neo-liberal welfare reforms, distinguishing their critical implications for “the poor” and welfare beneficiaries in terms of social recognition. In line with this, it analysed and explored the relations between different types of social policies, universal and selective, with citizenship and social recognition, and examined how social assistance policies can contribute to the social recognition of people in poverty as subjects of rights.

CHAPTER III

Welfare, Citizenship and “the Poor”: The Latin American Trajectory

Introduction

The purpose of this chapter is to develop a more specific analysis of the welfare trajectory followed in Latin America with a particular concern for the development, or under-development, of social assistance policies. This task acknowledges that although it is possible to identify common trends in the sphere of welfare and social citizenship, such as those discussed in previous chapters, the historical development of welfare and social policies in the region has showed an important level of diversity. As such, even though this research is concerned with the contemporary expansion of social assistance policies in the region through the study of the Chilean case, it is noted that this case is not representative of the whole region but rather is only one of the several welfare trajectories developed in Latin America. Consequently, apart from analysing the commonalities and differences associated with the historical development of social citizenship and welfare regimes among the countries of the region, the chapter also analyses the specific trajectory followed in Chile. By doing this, it is possible better to appreciate the factors explaining the conditions of welfare exclusion suffered by groups living in poverty in accordance with the historical configuration of the welfare architectures of the region, as well as to analyse the way in which one specific country, Chile, dealt with poverty and “the poor” under specific social and welfare conditions.

1. The Dynamics of Inclusion/Exclusion of Latin American Welfare Citizenship: An Historical Review

In order to research the citizenship implications of the contemporary development of social assistance policies in the region, this research has taken as one of its main references the theoretical definition developed by the English sociologist T.H. Marshall concerning the historical and normative configuration of citizenship. This theory of citizenship, although useful for the purposes of this research, has nevertheless been subject to substantial criticism as a result of ‘its evolutionism and lack of comparative scope’ (Molyneux, 2000:24). Here it is worth noting that Marshall’s theory of citizenship is mostly based on the ‘historical progression’ of citizens’ rights attributed to the British experience (Lister, 2010:207). In this sense, apart from the ‘anglocentric view’ underlying Marshall’s conceptualisation, his theory does not give much attention to ‘group differences’ in access to citizenship status, which thereby underplays ‘the

political struggles to achieve each set of rights' (Lister, 2010:207). Critics point to the fact that apart from being 'contested', citizenship is a 'contextualized' concept since it is subject to interpretation and articulation 'in specific national social cultural complexes' (Lister et al., 2007:1; in Lister, 2010:195).

In the light of the above reservations and specifications about the conceptualisation of citizenship as developed by Marshall, Perez and Sojo (2002) called for 'an adjustment' of the concept 'to the Latin American reality' considering how 'the sequence of implementation and exercise' of citizens' rights in the region did not follow the 'pattern' depicted by Marshall's theory (Perez and Sojo, 2002:21–22; in Barba, 2004:59). According to these scholars, it is possible to identify how under the period of ISI 'there was a primacy of social citizenship (although limited) over civil and political citizenship', while human, civil and political rights 'began to acquire supremacy' during the end of the 1980s when several Latin American countries were in the process of transition to democracy (Perez and Sojo, 2002:21–22; in Barba, 2004:59). The earlier primacy of social rights over civil and political rights did not mean a full realisation of these rights. In fact, even though Roberts asserts that Latin American governments have shown historically more willingness to 'extend the social benefits of citizenship' (Roberts, 1996:38) – something that for Garretón (1999) would express the "social democratic ethos" that has predominated in the region – it needs to be recognised, however, that the development of social rights in Latin America has been a 'slow, discontinued and incomplete' process (Castro, 1999:53). As identified above, this has to do with the fact that, different from European countries, Latin America was not able to develop proper (universal) welfare states (Barba, 2004; Filgueira, 2005; Molyneux, 2008; Ottone and Vergara, 2007). Notwithstanding this, Filgueira observed that by the last decades of the 19th century, but more strongly since the beginning of the 20th century, the states of the region began to develop different systems of social policies that encompassed subsidies, services and transfers, resembling a type of 'social safety net' (Filgueira, 2005:9). From Filgueira's perspective, these systems of social policies can be regarded as Latin American "social states" (Filgueira 2005, 2015) whose primary areas of social development were concentrated on health and education services, transfers and pensions, and subsidies and price controls.

As identified above, the expansion of the systems of social protection in place in the region corresponds to the period when most of the Latin American countries began to adopt a particular model of development – that is, ISI – which gave to the state a central role in the national strategies of socio-economic development by actively supporting the growth of

national industries through subsidies and protectionist measures. Nevertheless, the ‘developmentalist ideologies’ (Roberts, 1996) of this period did not just impact on the economy and national projects of industrialisation, but also on the necessity and legitimacy of the Latin American states for fostering welfare and social development. In fact, by the 1930s, and until the late 1970s, Latin American countries developed the first systematic ‘efforts of social citizenship construction’ (Filgueira, 2015:65) through public investment in education and health services, as well as by the institutionalisation and subsequent expansion of the systems of social insurance. Social security systems were based on the establishment of social insurance funds (Cajas de prevision) (Barrientos and Santibañez, 2009), financed mostly by workers and employers’ contributions with the aim of providing a level of protection against social risks associated with life and work courses. In this sense, the insurance funds of the region followed the “Bismarckian” model under which employment relations shaped the whole system of social security by covering mostly ‘the urban labour force employed’, and by making ‘benefits directly linked to contributions’ (Mesa-Lago, 1986:136).

In the light of the Bismarkian system of social insurance established in the region, it is possible to identify how this welfare reflected the ‘leitmotiv’ of Latin America after the Second World War, a period during which ‘formal employment conditions’ became the legitimate channel to socially integrate and enjoy the benefits of social citizenship (Bayon et al., 1998:79–80). More than social citizenship per se, what was encouraged by the Bismarkian systems of social insurance was a sort of ‘labour and regulated citizenship’ (Filgueira, 2015: 65), as rights were not granted according to need or other citizenship criteria but in accordance with the requirements associated with citizens’ formal labour participation and contribution. Nevertheless, even though the social insurance system can be regarded as one of the most distinctive features of the “social states” developed in Latin America, this does not mean that they achieved similar degrees of institutionalisation and expansion across all the countries of the region. In this sense, one cannot lose sight of the heterogeneity of the continent in matters of welfare and social policy. In fact, following Esping-Andersen’s work on welfare regimes, Barba (2004) identified that ‘under the umbrella of the social insurance paradigm’, and in the context of industrialisation, the countries of the region developed three different welfare regimes – “universalist” regimes, “dualist” regimes and “excluding” regimes (Barba, 2004:65) – a typology that coincided with the identification of three different types of “social states” developed by Filgueira (2005).

According to the above categorisations, Latin America's "universalist" regimes, which included countries such as Argentina, Chile, Costa Rica and Uruguay, have been identified as those that most reassembled the European-conservative welfare regimes, considering their gradual and universalising growth, as well as the link established between social protection and formal employment. According to Mesa-Lago (1986), Argentina, Chile and Uruguay (plus Brazil and Cuba) can be considered as part of the "pioneer" countries in developing formal systems of social protection in the region by the 1920s. These social security systems were characterised by the existence of several institutional bodies, with independent legislation and administrative procedures to deal with the social protection of different occupational groups allocated in different social security subsystems. As a result of this earlier development, countries such as Argentina, Chile and Uruguay were able to protect 'the vast majority of the population' through social security, basic health services and access to universal primary education (Filgueira, 2005:13). Notwithstanding these positive social indicators in matters of welfare and social security, these social states or welfare regimes showed a high level of stratification in regards to both access to social security and the granting of social protection. In fact, Mesa-Lago (1986) observed that even though the historical evolution of these social security systems followed a gradual incorporation of broader occupational groups, labour sectors and their dependents, such integration meant neither equal conditions of access to social security nor the entitlement of equal social benefits. As a consequence of this evolution, the pioneer countries ended up with stratified systems of social security as they established 'pyramidal structure[s]' in which small groups enjoyed the protection of 'privileged subsystems at the apex', while the rest of the population remained in 'subsystems providing less protection at the base' (Mesa-Lago, 1986:137). In practice, this stratification meant that 'state workers, professionals, urban services workers and urban manufacturing workers' gained social protection, while other categories of the population such as those self-employed, informal workers, unemployed and rural workers had a much later access to social benefits (Filgueira, 2005:14).

In comparison to the "universalist" but "stratified" welfare regimes, both the "dualist" (Brazil, Mexico and Colombia) and the "excluding" regimes (almost all Central American countries plus Ecuador, Peru, Bolivia and Uruguay) showed an incremental decrease in the levels of social spending, as well as in the degree of expansion and coverage of social security, education and health systems (Barba, 2004). According to Filgueira (2005), up to the 1970s, the "dualist" social states, encompassing countries such as Mexico and Brazil, were able to achieve almost universal primary education, significant (though stratified) degrees of health coverage, and less universal and more stratified social security coverage. According to Mesa-

Lago (1986), Mexico, along with Colombia, Costa Rica, Paraguay, Peru and Venezuela, were able to develop more unified systems of social security by the 1940s. Indeed, even when covering lower segments of the population from fewer social risks, these social security systems were less stratified than those built by the earlier developers (Mesa-Lago, 1986:139). Finally, there were the “exclusionary” social states (Filgueira, 2005), which developed in countries such as Guatemala, Honduras, El Salvador, Nicaragua and Bolivia. Regarding welfare and social protection, these countries were characterised by large sections of the population living in poverty (more than 50%), dual education systems, and ‘elitist’ health and social security systems. As a result, by the 1970s less than a quarter of the population across all these countries were covered by social security or other programmes of social protection (Filgueira, 2005:30). These countries were the “later developers” in Mesa-Lago’s typology of social security systems, encompassing almost all the countries of Central America and the Caribbean. These systems, which emerged by the 1950s and 1960s, were able to build unified systems but with deficient levels of coverage, available only in capital cities or in widely populated areas (Mesa-Lago, 1986:139).

From the diversity of welfare trajectories developed by the 20th century, it is possible to identify how, even in the best cases, social rights and the systems of social security developed in the region were not entirely able to offer equal conditions of social integration for all categories of the population. To a vast extent, the inequalities of social integration observed in the welfare regimes of the region were produced by the system of social insurance. In fact, as observed by Barba, Latin American social insurance institutions were highly ‘regressive’ and ‘nondemocratic’, considering that only in a few cases did they allow for the expansion of social citizenship rights, keeping an ‘assistance exclusion’ (*exclusion asistencial*) of those population groups marginalised from the formal labour market (Barba, 2004:65). As a result, by the 1980s only urban-wage earners were covered by social insurance across the countries of the region (Mesa-Lago, 1986), while the most “needy-groups”, such as agricultural and independent workers, domestic servants and the unemployed remained in conditions of welfare exclusion.

Nevertheless, part of the limitations or exclusions developed under the systems of social security in the region can be explained by the political conditions under which the ISI model operated. In fact, in most of the cases, the running of these national-industrialising projects was conditioned on the establishment of ‘redistributive coalition[s]’ (Barba, 2004) akin to this strategy of development. In practice, these coalitions included the participation of different actors such as organised working sectors from manufacturing and extractive areas, as well as

middle sectors representing civil servants and public employees (Roberts, 1996; Barba, 2004; Barrientos and Santibañez, 2009). Critical for the working of these coalitions were political parties representing particular interest groups, as well as special treatment (protection) provided to military and police sectors with the aim of keeping social and political stability (Barrientos and Santibañez, 2009). Overall, these political coalitions have to be seen in the light of the 'corporatist populism' (Molyneux, 2007) that began to emerge across the countries of the region after the impacts of the 1929 economic depression, the crises of oligarchic models, and the political pressure exercised by new working and middle-class sectors. Under these critical conditions, and in order to reduce class conflicts and secure support to the nationalist strategies of industrialisation, populist governments gave priority to welfare development as an essential mechanism of social integration and cohesion. Nevertheless, under Latin American populist regimes this welfare development ended up being 'selectively inclusive,' reproducing 'the clientelistic structure of corporatist favouritism' (Molyneux, 2007:7). Then, taking into account the operative and political shortcomings showed by Latin American welfare development in terms of social integration and equalisation during the 20th century, one cannot lose sight of the fact that beyond mere systems of social policy or social insurance, the social states of the period constituted orders of legitimation and domination, which apart from defining and legitimating inequalities, established 'the frontiers of inclusion and exclusion to the Latin American modernity' (Filgueira, 2005:222).

2. Modernisation, Marginality and Residual Social Assistance

From the above discussion, it seems clear that the development of social citizenship during the 20th century in Latin America was part of a broader project of modernisation guided by the conception of societies with growing levels of industrialisation and urbanisation (Filgueira, 2015) as the key signs of progress and development. Under this paradigm, it was expected that the growing modernisation of Latin American societies would allow for the gradual integration of marginal sectors by both their incorporation into the wage regimes, and by the broader coverage of social security institutions (Barba, 2009:19–20). Nevertheless, Latin American countries remained mostly agricultural by the 1950s (Roberts, 1996), with a significant peasant population and limited development of their economic markets. In fact, while south-cone countries had on average 25% of their populations in the agricultural sector in 1960, the rest of the countries of the region had an average of 50% (Roberts, 1996:46). Further, the processes of urbanisation through the internal migration of peasants during this period were not entirely shaped by proletarianisation. As a result, in 1940 around 35% of the

economically active urban population were either self-employed or unpaid family workers (Oliveira and Roberts, 1994; in Roberts, 1996:48). Such categories represented the informal sector of Latin American economies, which, in addition to individuals working in small enterprises with less than five workers, represented over a third of total urban employment in 1960 (Roberts, 1996).

Unsurprisingly, the significant percentage of the population outside the formal labour market and without access to state social protection were pointed to as evidence of the shortcomings of the Latin project of modernisation, particularly in regards to the real conditions and opportunities given by the now “urban” and “industrialised” societies to secure the social integration of the most vulnerable sectors of society – that is, the urban poor. In fact, during the 1950s poverty became a matter of public and scientific concern in the region. To a large degree, this public concern could be explained by the ways in which urban poverty materialised during this period as the peripheral areas of several Latin American cities witnessed the development of ‘extremely precarious patterns of territorial occupation’ (Alvarez, 2008:96), such as the so-called “*villas miserias*” (misery villages) in Argentina, or the “*campamentos*” (camps) in Chile. In the light of these poor patterns of urban development, several scholars began to emphasise the state of social and economic marginality that characterised most of the urban population of the region by the 1950s and 1960s (Roberts, 1996). As analysed in previous chapters, the analysis of poverty during this period, as well as the wider discussion about the “social question” in Latin America, unfolded through the notion of “marginality” through which a significant debate developed about ‘the conditions of integration of emergent social sectors’ across the countries of the region (Savari, 2007:39). In the light this debate, one of the most common explanations for the conditions of marginality suffered by these emergent social sectors referred to the end of the “easy stage” of the ISI model in Latin America. In this sense, the growth of urban poverty was explained as the consequence of the mismatch between two contradictory trends: on the one hand, the stagnation in the growth of formal urban employment; and on the other hand, the gradual intensification of internal migration and urbanisation (Pinto and Di Filippo, 1979; Stavenhagen, 1998; Alvarez, 2008). Additionally, to these structural factors, the new social sectors associated with the growth of urban poverty in the region were explained in accordance with the two predominant perspectives about marginality analysed in previous chapters – namely, “modernisation” and “dependency” theories.

Of relevance here regarding the “the marginality debate” is the way in which poverty, as a matter of public concern, acquired significant degrees of visibility and public recognition. In this sense, the notion of “marginality” helped as a means by which to systematically discuss the unequal conditions and barriers suffered by groups living in poverty to integrate into the formal institutions of society, particularly in the labour market. Notwithstanding the relevance of this analysis, it is necessary to acknowledge how “the marginality framework” did not give much attention to another equally important channel of social integration: welfare institutions. This is understandable considering that access to social security, as discussed above, was determined by the wage-earner status; however, the predominance of formal employment meant in practice that social assistance remained mostly ‘residual’ (Barrientos and Santibañez, 2009) in Latin America, which marginalised the poor even more. In fact, even though actions to relieve poverty date back to colonial times, in most of the cases it was a kind of ‘philanthropic welfarism’ (Molyneux, 2007:6) carried out mainly by religious institutions. As such, by the mid-19th century, the social question in Latin America was predominantly ‘a problem of control and philanthropy’ (Filgueira, 2015:52) to be managed by the state and the forces of security and order, including the church and charity institutions. Nevertheless, by the 20th century the state began to participate more actively in the “management” of the social question. As a result, while social assistance was delivered by both private and religious charity to widows, the sick, the helpless and the poor, the state acted directly in the development of urban sanitation and in the improvement of the hygienic conditions of the population (Filgueira, 2015). Development of state social assistance towards the population living in poverty in the region, as identified by Molyneux (2007), was characterised by a treatment of poverty in which “pettiness” and “fieriness” predominated. Yet, by the beginning of the 20th century this treatment evolved towards a reformist impetus under which efforts were made to ‘rescue,’ ‘rehabilitate,’ ‘educate’ and ‘sanitize’ “the poor” (Molyneux, 2007:17).

The type of social assistance described above, which mixed ‘repressive and protectionist components’ (Filgueira, 2015) when dealing with poverty, did not show significant transformations during the period of industrialisation when most of the Latin American systems of social assistance developed and grew. Regarding social assistance, Filgueira (2015) observed that the main innovations during this period were the introduction, in the most developed countries of the region, of some non-contributory forms of social insurance, such as households’ allowances, as well as targeted social assistance pensions. In addition, the vast majority of the countries of the region developed social programmes seeking to improve basic food consumption among the population through subsidies and price regulations, as well

as through nutritional programmes especially targeted on mothers and new-born children. As analysed in previous chapters, “poor women” in Latin America, as identified by Molyneux (2007), have been seen, at different times, as a priority group in need of social assistance as a result of public concerns related to women’s sexual vulnerability, child protection, female work activities, family management, and so on. This welfare concern for poor women in turn led to the strong ‘maternalistic’ orientations that shaped the residual development of social assistance in the region (Barrientos and Santibañez, 2009), and the “familiarist” approaches behind the actions of poverty relief. It should not be forgotten how the dynamics of inclusion and exclusion through which social citizenship developed in Latin America were not ‘gender blind’ (Molyneux, 2006, 2007) but rather the opposite. In fact, one of the characteristic features of the social insurance systems based on formal employment that developed across the region was their organisation in accordance with the “familiarist” and “paternalist” “male breadwinner model” (Filgueira, 2015; Barrientos and Santibañez, 2009; Barba, 2004). Based on this model, welfare benefits were granted first and foremost to male wage-earners, and then to their family dependents, among them women in their status as wives and mothers. In addition to this unequal welfare protection by gender status, the gradual incorporation of women into the workforce during the 20th century did not mean greater access to social protection in the region. Indeed, women were employed in low-paid jobs and also in less organised employment sectors, which frequently included working in the informal sector and developing domestic services (Molyneux, 2006). To a large degree, women’s precarious labour integration meant that they remained, in most cases, ‘marginal to the contractual negotiations of the corporatist state’, which helped to reproduce a conception of female work as merely ‘supplementary to the male wage’ (Molyneux, 2007:7). Hence, gender inequalities in the sphere of welfare were directly implicated in the dynamics of inclusion/exclusion behind the configuration and institutionalisation of social citizenship in Latin America.

3. The Social Integration of “the Poor” Under Chilean Welfare Development

Modernisation and Welfare Development in Chile

Chile has been identified as one of the pioneer countries in matters of social security development in Latin America. The foundational moment in the history of welfare development in Chile dates back to the 1920s when the country witnessed a series of public discussions and concerns produced by the so-called “social question” – the name given to a series of social problems generated by the earlier processes of industrialisation and urbanisation

developed in the country during the last two decades of the 19th century. After the Pacific War (1879–1883) between Chile and Peru, the country was able to incorporate new territories around the north area, which were suitable for nitrate mining, the basis of the Chilean economy until the 1930s. Even though the nitrate enterprise remained in foreign hands, tax revenues allowed the state to assume a relevant role in the process of socio-economic development by ‘the building of railways and basic infrastructure’ (Arellano, 1985:399), along with fiscal spending on public services (Pinto, 1963:645). These trends of development encouraged significant levels of internal migration and urbanisation, along with the diversification of the social structure of the country as a result of the growth of a middle sector employed in the emerging public bureaucracy, as well as by the development of ‘a relatively numerous and organized working class’ (Pinto, 1963:172). This early modernisation, however, was accompanied by a series of social conflicts produced by the work and life conditions affecting the new proletariat and urban population (Arellano, 1985; Martinez and Palacios, 1996; Larrañaga, 2010). While working conditions in the northern mining centres of the country were harsh (e.g. depopulated areas, labour precariousness, extreme weather) (Pinto, 1963), the working conditions of the urban population were characterised by verbal labour contracts, cashless “wages” and the absence of labour legislation regarding Sunday rest, maximum working hours per day, and child and female work (Arellano, 1985:399); further, urban living conditions were characterised by housing shortages, sanitary and health problems, as well as high mortality rates (Arellano, 1985:399).

The institutional answer given to the social question came from the approval of a package of “social laws” in 1924 under the presidency of Arturo Alessandri Palma (1920–1925), encompassing a series of labour regulations in matters of formal labour contracts, trade unions, strike rights, conflict negotiations and social security, including the creation of the first social insurance funds of the country (Arellano, 1985). By the same year, the “Ministry of Hygiene, Social Assistance and Security” was established, while in 1925 a new political constitution was approved, which, for the first time in Chile, defined as a duty of the state the protection of work, and the development of social security in order to guarantee basic welfare conditions for the population. According to some views, the welfare responsibilities assumed by the state during this period signalled a “change in mentality” in Chilean society, particularly among the elites, by which social problems ceased to be regarded as matters of charity and began to be seen as issues of social justice (Arellano, 1985; MIDEPLAN, 1991; Larrañaga, 2010). This concern for social justice, according to Silva (1993), was mobilised by President Alessandri as ‘a unifying tool’ to encompass the different sectors supporting his ‘anti-oligarchic coalition’

compounded by popular urban sectors, middle classes and emergent industrial groups (Silva, 1993:467). In this context, the discourse of social justice developed by Alessandri helped not only 'to voice the hopes and expectations of the urban masses', but also to process and channel 'the revolutionary potential' of the social struggles of the decade (Silva, 1993:467). Overall, this new political concern for social justice signalled the end of the oligarchic regime in Chile, and its subsequent replacement by a democratic presidential order established by the 1925 political constitution – the regime that would rule the country without interruption until 1973.

Even though the social question, as well as the political struggles of the 1920s, constituted the immediate antecedents of welfare development in Chile, the determinant factor behind its consolidation was, as in the rest of Latin America, the adoption of the ISI model after the impacts of the "big depression" of the 1930s. During that decade, the state in Chile engaged directly in fostering the national industry by the creation of several public institutions such as the National Corporation of Productive Promotion (CORFO) in 1939, along with the development of large state companies¹² in strategic areas of the national economy (Olmos and Silva, 2010:3). The "developmentalist project" did not materialise only in the economic sector but also in the sphere of welfare and social development. In 1931 the first Labour Bill was passed in the country, which integrated and brought together the social laws of the previous decade, and also added new dispositions regarding with 'minimum wages and the payment of indemnities for dismissal' (Arellano, 1985:406). Further, in order to satisfy the demand for housing among workers, "The Popular Housing Fund" (*Caja de la Habitación Popular*) was established in 1936.

Overall, during the 1930s, the "protectionist" emphasis drove the early labour and social legislation in the country as it shifted towards a much clearer "welfarist" approach (Arellano, 1985; MIDEPLAN, 1991; Martinez and Palacios, 1996; Marquez, 2005). This shift can be mainly explained by the constitution of the "Popular Front"¹³ coalition through which the "Radical Party" gained the presidency in 1938, ruling the country until 1952 under three

¹² Among the most prominent state companies created during this period were "The National Electricity Company" (ENDESA), "The Petroleum National Company" (ENAP), "The Steel Pacific Company" (CAP), "The National Company of Telecommunications" (ENTEL) and "The National Sugar Industry" (IANSA) (Olmos and Silva, 2010).

¹³ This was a political coalition formed by five political parties: the Socialist Party; the Communist Party; the Democratic Party; the Radical Party; and the Radical Socialist Party. The Popular Front also included the participation of different organisations, such as the Confederation of Chilean Workers (CTCH), the Arauco Unitarian Front, and the Organization for Chilean Women Emancipation (MEMCh).

consecutive presidential administrations. During this period, several important welfare initiatives were established, such as the “National Health System” and the “Social Security Service” in 1952. Also, new segments of the working population were incorporated into the system of social insurance,¹⁴ along with the gradual introduction of new welfare benefits such as family and maternity allowances, and unemployment payments. In regards to the educational field, the period showed an increase in the enrolment rate, particularly in secondary education, as a result of the earlier enactment of the law on compulsory primary education in 1920,¹⁵ and the systematic building of public schools¹⁶ during this time. Several technical universities were also created in order ‘to train the technicians in charge of managing the new industries of the country’ (Olmos and Silva, 2010:4). Finally, in 1953 the National Board of Student Assistance (*La Junta Nacional de Auxilio Escolar*) was established in order to help satisfy the nutritional needs of students from lower-income households, as well as to provide primary school equipment.

Unsurprisingly, the above period is usually depicted as one of the most “glorious” phases of welfare development in the country under the successive administrations of the Popular Front. However, even though this coalition championed ‘the economic and social rights of the poor’ under a rhetoric that stressed ‘citizen entitlement’, and public services’ democratisation (Roseblatt, 2001:556), the reality was that access to these entitlements remained quite selective in practice. As analysed by Roseblatt, working-class sectors in formal employment, particularly those occupied in the industrial and mining sectors, the majority of them men, were the main welfare constituency entitled to social security rights. Additionally, those middle-class sectors that were ‘members’ of the coalition in power were also favoured by the welfare development of the period, particularly by the employment opportunities opened as a result of the expansion of public services (Roseblatt, 2001:569). In comparison, ‘nonworkers and workers outside the formal sector’ continued to receive welfare benefits ‘more akin to charity’ than citizenship rights (Roseblatt, 2001:556). Here it is necessary to note the particular situation suffered by women in the welfare field who either as housewives or as non-industrial workers were entitled to fewer rights and less political influence. This discriminatory treatment

¹⁴ By 1955, the economically active population covered by social security in Chile reached almost 65% (Arellano, 1985:407).

¹⁵ From 1920 to 1950, the enrolment rate doubled in Chile, covering 60% of the population aged 6–11 years old (Braun et al., 2000; in Larrañaga, 2010:7). Although growing, the enrolment rate of secondary education was much lower, reaching 15% of the population between 15 and 19 years old (Larrañaga, 2010:7)

¹⁶ In fact, while in 1932 there were 3,931 public schools in Chile, in 1940 this number increased to 4,214 – that is, 238 more public schools in just one year (Martinez and Palacios, 1996)

can be explained by the 'gendered political economy' that prevailed during this period in the welfare field, which, as a result of the association between industrial work and masculinity, circumscribed women's representation and political participation to their roles as housewives and mothers (Roseblatt, 2001:563).

Under the above conditions, it is possible to identify how 'women were generally inserted into' the system of social security of the country 'as female dependants' without much power to influence on the administration of welfare benefits by the state (Gideon, 2008:76). Welfare benefits that in most of the cases were contingent on women's relationship 'to an insured male worker', and secondary, on their scarce 'role in the labour market' (Arenas de Mesa and Montecinos, 1999:17). In fact, prior to the welfare reforms carried out during the 1980s, it is possible to identify three characteristic forms in which women were included into the social security of the country: first, as "dependents" which implied the access to pensions for widows, and maternity and medical care for spouses, plus access to family allowances; all benefits that in terms of their quantity and quality depended on 'the position of the insured worker in the occupational structure' (Arenas de Mesa and Montecinos, 1999:17). The second way in which women gained access to social security benefits was as "contributors" which was the case of women employed in "nonmanual occupations" receiving benefits 'above the national average'; of those employed in the "manual occupations" who were entitled to social security 'earlier' but with benefits 'still lower than the national average'; and finally, of women occupied as 'domestic servants' (Arenas de Mesa and Montecinos, 1999:17). The third way in which women were incorporated into the system of social security of the country was through 'limited access to social benefits' which was the case of those women 'dependent on but not legally related to an insured worker' (e.g. concubines and unmarried mothers), as well as of women engaged in agricultural activities and in the informal sector; both groups receiving 'little and tardy' social security coverage, and also suffering from poor labour protection (Arenas de Mesa and Montecinos, 1999:17).

The Limits of Social Integration in Chile: Commitment Politics and Clientelism

Since the establishment of the ISI model in the 1930s, the state in Chile was able to consolidate a public system of social services of extensive, though highly stratified, coverage (Marquez, 2005). As discussed above, welfare stratification was a feature that distinguished the systems of social security of the "pioneer" countries in the region. As such, the type of "welfare state" established in Chile followed the "Bismarckian-corporatist" model that

segmented social security access and benefits by class and occupational stratification (Larrañaga, 2010). In practice, this meant the creation of several insurance funds, with different financing mechanisms and benefits, that dealt differently with the social security of workers, private employees and public employees. In addition to this stratified evolution of social security in Chile, the expansion and growth of welfare benefits was not a 'uniform' process but rather a gradual and partial achievement driven by the pressure of 'unions and workers' organizations' (Arellano, 1985:409). To several scholars, one of the factors that explains the development of corporatist politics in Chile was the so-called "committed state" that prevailed in the country during the beginning of state-led industrialisation in the 1930s (Garretón, 1981; Tironi, 1990; Arrau and Avendaño, 2001; Marquez, 2005).

Here is important to note that the committed state in Chile developed alongside two other parallel processes: on the one hand, the industrialising project led by the state; and on the other hand, the 'growing process of democratization' through the incorporation of groups with pressure capacity into 'the political-social life and its benefits' (Garretón, 1981:102). According to Tironi, these two processes were part of the 'democratic arrangement' that prevailed in Chile from the 1920s to 1973, characterised by state-led industrialisation, the systematic incorporation of new social groups, and the constant expansion of the democratic-political system (Tironi, 1990:109). As agreed by both Garretón and Tironi, the central actor in this type of committed politics was the state as 'the integrative nucleus' (Tironi, 1990) of Chilean society during the second half of the 1920s. Nevertheless, the trends of social integration developed in the context of the committed state and secured by corporatist politics in Chile showed a series of critical shortcomings. While the centrality of the state during this period seems to have diminished the development of a robust and independent civil society, it also encouraged the widespread adoption of clientelistic relations and practices (Garretón, 1981; Arrau and Avendaño, 2001; UNDP, 2004). Indeed, the reorganisation of power relations in Chile during the 1920s went hand in hand with the development of 'populist and clientelistic' relationships between state elites and the masses (UNDP, 2004:76). Under these conditions, the promulgation of new laws, as well as the chances to access 'the state mechanisms of social promotion', were less the product of citizenship debates, but more the means by which the state in Chile exercised social and political control (UNDP, 2004:76).

In the light of these political conditions that in turn constituted the context under which the welfare system of the country began to emerge and consolidate, it is possible to identify how the development of social citizenship was strongly subordinated to political citizenship. In other

words, the real opportunities for social integration in Chile, and the establishment of, as well as access to, state mechanisms of social promotion were determined first and foremost by participation in the sphere of institutional politics. As observed by Arrau and Avendaño (2001), the gradual offer of channels of social integration in the context of the committed state in Chile gave 'huge importance to the system of [political] representation' (Arrau and Avendaño, 2001:23). Nevertheless, bearing in mind the high levels of clientelism that prevailed in Chile, it is not difficult to see how the democratising potential of the processes of political and social integration developed under the Chilean committed state remained significantly constrained. Indeed, the trends of social integration that developed during the 1930s in Chile were vertical trends in which political parties, as well as 'intermediaries' (frequently bureaucrats), represented the 'nexus' between the state and the interest groups (Urzúa, 1973:117; in Arrau and Avendaño, 2001:25). Overall, these clientelistic relationships helped to produce 'fractioned' (Urzúa, 1973) and 'segmented' (Garretón, 1981) processes of social integration. As a result, while dependent middle sectors, along with the mining and industrial working class, were favoured by this "modality" of social integration, both independent middle and working sectors, as well as marginal social categories such as peasants and the urban poor, were left behind (Urzúa, 1973; in Arrau and Avendaño, 2001; Garretón, 1981).

The Welfare Integration of the Poor: Social Assistance, Social Promotion and Popular power

It is possible to observe how the wide "commitment" or "consensus" achieved in Chilean society about both the national strategy of development and the political system during the 1930s rested in practice on the 'fundamental' and 'structural' social exclusion of two social categories – the marginal urban poor and the peasantry (Garretón, 1981:103). Such exclusions were explained by the committed politics of the period that sought to protect the interests of landowners and agrarian sectors (Silva, 1993; Garretón, 1981), as well as to secure the interests of middle sectors, a class that gained wide political representation during this period (Garretón, 1981). As a result, a problematic scenario in Chile arose where, at the same time that the "Bismarckian" social security model based on formal labour participation had little significance for peasants and the urban poor, the wide influence of committed politics disadvantaged these groups even more. Therefore, notwithstanding the "welfarist" momentum that guided the development and expansion of social security and social policies in Chile since 1930, until 1952 little systematic action was developed by the state to improve the living conditions of the poor. In fact, even though poverty appeared as the most important factor

behind the limits to expand primary education, until the 1950s the state did not directly assume the financing of school aid measures, keeping that responsibility in the hands of charity institutions and city councils (Larrañaga, 2010). Also, the state did not take charge of building popular social housing during these years, instead it reduced the housing problem to issues of rent prices and living standards. However, housing shortages plus urban demographic growth became a critical social problem in Chile when a series of precarious settlements began to develop, particularly in the capital, known as the “mushrooms populations” (*poblaciones callampa*) or simply “camps” (*campamentos*)¹⁷ (Larrañaga, 2010:8).

According to Rovira (2014), until the 1950s poverty in Chile was mostly a problem of sanitation and housing. In fact, by the end of the oligarchic regime, and since the development of the social question in the late-19th century, a public concern began to develop in Chile regarding widespread diseases and pests as a result of the trends of urbanisation and the problems of urban housing among popular groups. Under these conditions, the hygienist medical thought of the time gained broad legitimacy, exercising significant influence on the actions taken by the oligarchic elites in the country. As a result, a series of measures to deal with the sanitary crisis developed, such as making compulsory the teaching of hygiene in public schools in 1872, and in 1887 a law on mandatory vaccination was passed. In 1892 both the “High Council of Public Hygiene” and the “Institute of Hygiene” were created in order to advise governmental action on sanitary matters. From Rovira’s perspective, this was the context in which the first social interventions on popular sectors developed in Chile, particularly focused on the control of diseases. This early form of social assistance was mainly targeted on those poor groups ‘worthy of help’ – namely, mothers and orphans – in order to stop the spread of both diseases and vagrancy (Rovira, 2014:87). In this sense, it is possible to see here the signs of a particular “biopolitical project” that, while highly influenced by the hygienic discourse, constructed children’s needs and mothers’ care work as essential for dealing with the problems brought by the social question (Rovira, 2014). In line with this project, the production of poverty as a massive problem in Chile by the end of the 19th century was mainly framed as a consequence of the social question, particularly in regards to the situation of poor children, frequently orphans, condemned to live a life in vagrancy or mendicancy (Rovira, 2014:86). Further, poor

¹⁷ These were marginal settlements developed in empty urban terrains, frequently state property (Larrañaga, 2010). The housing conditions in these precarious settlements were characterised by a lack of basic services such as water, electricity and sewerage.

children were the most affected by disease transmission, which seemed to be one of the most important factors behind the high levels of child mortality during this period.¹⁸

In order to deal with “the” national problem, then, a series of social policies were developed in Chile, which, combining ‘philanthropic’ and ‘scientific’ approaches, focused on the care of children’s bodies through health, nutrition and, later, education (Rovira, 2014:89). Since the beginning, these social policies depended heavily on women, particularly on mothers’ care work; it was necessary to socialise poor women about the proper ways to satisfy children’s needs (Illanes, 2006; in Rovira, 2014). In addition to these direct forms of intervention, two social assistance state bodies were created during this period: the “Patronage of Children” (*Patronato de la Infancia*) in 1903 with the goal of providing shelter for orphan children; and the “Drop of Milk” (*Gota de Leche*) in 1906 with the aim of encouraging breastfeeding. Here is relevant to observe how ‘milk programmes’ such as “the Drop of Milk” can be considered as an expression of ‘maternalism in social policies’ which, through the provision of ‘infant-maternal health care and milk’ in order to deal with the social question, have ‘promoted a particular kind of citizenship for women’, one based on the protection of women ‘as mothers’ (Goldsmith, 2020:70). In the light of this, it is not difficult to understand why one of the first entitlements granted to working women in Chile was the right to breastfeeding their children in 1917 (Staab, 2017:1971). Maternalist social policies that expanded in 1954 through the establishment of the “National Programme for Supplemental Nutrition” (PNAC) (*Programa Nacional de Alimentación Complementaria*) with the aim of providing ‘regular foodstuff and preventive health care services for mothers and children up to age six at neighbourhood primary healthcare clinics’ (Goldsmith, 2020:70). A large-scale nutritional programme that apart from functioning for more than seven decades, has developed ‘in tandem with the effective extension of the modern state to previously disenfranchised sectors’ in Chile (Goldsmith, 2020:75). Sectors that apart from these type of programmes were favoured by a series of charity initiatives sponsored by the figure of the First Lady (*Primera Dama*) of the country during these decades, such as the “Wardrobe of the Poor” (*Ropero de los Pobres*) in 1931, the “Pot of the Poor” (*Olla de los Pobres*) in 1932, and the “Christmas for Poor Children” (*Pascua pro Niño Pobre*) in 1938 (Rovira, 2014). Apart from these initiatives, by the 1950s state social assistance of the poor in Chile was mainly delivered through public institutions such as hospitals and schools. Yet, the most important innovation during this period was the establishment of the programme “Protection of Helpless Children” (*Proteccion a la Infancia*

¹⁸ In 1900, 370 of 1,000 children born alive died (MIDEPLAN and MINSAL, 2010; in Rovira, 2014:89).

Desvalida) by the first president of the Radical party (Pedro Aguirre Cerda, 1938–1944) with the aim of supporting the educational performance of poor children via the provision of school meals (breakfast and lunch), medical attention, and school clothing and supplies (Martinez and Palacios, 1996).

Only by the 1960s did a new welfare approach towards poverty develop in Chile as a result of the election of Eduardo Frei Montalva from the Christian Democratic Party, who was President from 1964–1970. Frei's two main campaign commitments were wealth redistribution and the social incorporation of marginal groups. During this presidential administration a series of progressive policies were carried out, such as the development of the first agrarian reform¹⁹ of the country, along with significant increases in social expenditure,²⁰ including the expansion of the education and housing sectors. These structural reforms were part of Frei's "revolution in freedom", a socio-political project that sought to reduce the levels of social inequality in Chilean society while avoiding 'direct social confrontation' (Silva, 1993:473). An integral part of this revolution though peaceful project was the development of a new way to approach poverty in Chile, based on the notion of "social and popular promotion" (Martinez and Palacios, 1996; Marquez, 2005; Rovira, 2014). Different from social assistance policies that targeted "atomised" and "passive" individuals, popular promotion sought to encourage the collective self-management of the poor, as well as communitarian social participation. In order to achieve these goals, in 1967 "the law of peasant unionisation" (*Ley de sindicalizacion campesina*) was passed, which along with the agrarian reform allowed for the organisation of rural workers in cooperatives. By the same year, "the law of neighbours' boards" (*ley de juntas de vecinos*) was also passed, which gave legal personhood to communitarian organisations such as "mothers' centres" and "neighbourhoods committees". This new legislation, among other things, allowed the expansion of already existing and important grass-roots organisations as was the case of mother's centres. In 1938 the Catholic church created the first "mothers' centres" in Chile, which, as organisations of social assistance and charity, targeted poor women, offering them a 'common space' of participation, as well as training opportunities to learn some manual techniques (Weisntein, 1996:7). Under the project of "social promotion" established in 1964, mother's centres developed and expanded significantly across the country as part of the project of social inclusion carried out by Frei, encouraging the self-organisation of popular groups in order to gain political representation. In this context, and by

¹⁹ During this administration, the state expropriated 15% of the total amount of agrarian lands in the country (Arrellano, 1985).

²⁰ In 1970, social expenditure represented around 20% of Chilean GDP (Arrellano, 1985).

the creation of CEMA (the national coordinating organisation of mothers' centres) in 1964, mothers' centres became active supporters of women's technical and organisational training, providing also economic means so that women could develop some productive activities within the home, and thereby contribute to the family income (Weisntein, 1996:8).

Hence, through popular promotion and by the action of legislative measures that sought to encourage the social participation of marginal sectors in Chilean society, the state embraced a new political commitment of social and political integration of popular sectors. By the 1960s, poverty, as in the rest of Latin America, began to be discussed as a problem of marginality, which was mostly explained by the growth of urban poverty, along with the widespread development of precarious settlements across the main Chilean cities. In fact, according to the 1952 census, 30% of the national population did not live in decent houses – that is, living in houses of poor-quality construction, living in others people's houses, in slums or in “camps” (Garcés, 2002; in Rovira, 2014:107). Nevertheless, the “urban crisis” developed primarily in Santiago, the Chilean capital, where, by 1959, 8% of the population were living in “camps” (around 150,000 people) (Valdes, 1983; in Espinoza, 1998:74), this percentage grew to 12% in 1966 (Espinoza, 1998:76). As such, one of the most relevant social demands of the decade, if not the most important, was property, which in the case of the urban inhabitant or “settler” (*poblador urbano*) was a demand for land ownership and housing development (Rovira, 2004:108). As a result of the urban crisis, by the 1960s there was a significant growth of illegal land take-overs (*tomas de terreno*) carried out by marginal groups, actions that increasingly acquired a political character. These organised illegal settlements helped marginal groups to protest about the lack of systematic housing policies in Chile (Rovira, 2014), as well as to demand recognition and support from the state to resolve their housing needs (Espinoza, 1998). Hence, following Marquez (2005), these new ways of inhabiting the city by marginal groups gave them a significant level of agency, which impacted considerably on the processes of political and social change in Chile from the 1960s until 1973.

During Frei's administration, there was an active intervention of the state on the urban housing crisis, which materialised, for instance, in the establishment of the Chilean Housing Ministry in 1965. Also, between 1965 and 1970, 241,000 houses were built in Chile, half of them by the public sector, and the other half by the private sector but with state subsidies (Hidalgo, 2004; in Larrañaga, 2010). Under Frei's administration, housing policies became pivotal in Chilean society because through them it was possible to stimulate the economic sector, give answer to the most urgent social demands, as well as to increase “the institutional integration”

of urban marginal groups (Espinoza, 1993:76). Nevertheless, from the perspective of social integration and participation, the most crucial policies during this period were encompassed by the programme of social promotion. According to Espinoza (1993), the ideology behind social promotion celebrated 'the virtues of popular communities' that were not only able to carry out strategies to self-construct houses but also to collectively organise their life conditions (Espinoza, 1993:76). In line with this view, the goal of social promotion, as conceived originally by the DESAL,²¹ was mainly to strengthen the social integration of marginal popular groups, which involved giving them opportunities to participate in and influence the processes of decision-making (Arias, 2008). In fact, according to the DESAL approach, marginality in Latin America was, to a large extent, explained by a restricted societal basis, characterised by a lack of popular organisations that could connect popular sectors with intermediate mechanisms in order to achieve social and political representation (DESAL, 1968; in Arias, 2008:148).

Chile was one of the first countries in Latin America where the social promotion strategy to tackle poverty and marginality was applied, mainly through the development, as discussed above, of 'a myriad of intermediate organizations' such as neighbourhood committees and mothers' centres (Van Der Ree, 2011:26). As a result of these policies, between 1964 and 1970, 3,487 neighbourhood committees and 9,000 mothers' centres were created in Chile (Espinoza, 1993:76). Through these grassroots organisations, it was possible to connect 'the communitarian associative life' of marginal sectors in Chile with 'the political life' of the country, allowing the institutional channelling of popular social demands (Espinoza, 1993:76). Under these political conditions, the Christian Democratic Party sought to produce a "true" or "real" democracy in Chile in which social integration would be secured by popular participation in intermediate political organisations (Van Der Ree, 2011). As result of this socio-political project that sought to strengthen democratisation through social promotion, Frei's administration was able to develop 'an active national-populist policy' that, interestingly enough, did not require to put into question 'the social structure' of Chilean society (Espinoza, 1993:76). In fact, while it was expected that the social integration and political participation of marginal groups encouraged by social promotion policies would allow the extension and expansion of social and political citizenship, it would be done 'without engendering political conflict' (Van Der Ree, 2011:26).

²¹ The Centre for Latin American Economic and Social Development (DESAL), founded by Roger Vekemenas, one of the most important conceptualisers of the social promotion strategy (Arias, 2008).

According to Silva (1993), the policies of social promotion applied systematically during the 1960s allowed a significant change in attitude among popular sectors in Chile who ‘ceased to be passive receivers of social benefits from the state’ and became more active pressure groups (Silva, 1993:473). However, this change was accompanied by important levels of radicalisation by the end of the decade as a result of delays in the development of social policies, and the unfulfilled promises of the Christian Democratic government (Silva, 1993). In fact, notwithstanding the significant efforts made by Frei’s administration to resolve the urban housing crisis, it was not possible to absorb the magnitude of the social demand at the time (Espinoza, 1993), and economic stagnation and high inflation did not allow the further expansion of social investment by the end of the 1960s (Espinoza, 1993; Larrañaga, 2010; Olmos and Silva, 2010). Hence, ‘the deepening of democracy’ produced by the social integration and political representation of new social groups and their demands in Chile, began to strongly ‘collide’ with the shortcomings of the economic structure of the country (Larrañaga, 2010:8). Under these conditions, popular groups radicalised their actions – a radicalisation that was significantly influenced by left-wing parties (Espinoza, 1993; Silva, 1993; Larrañaga, 2010). This was the moment when “the left” in Chile began to actively dispute the adherence of popular sectors to the Christian Democratic Party (Larrañaga, 2010), criticising the “paternalistic” policies developed by Frei’s administration (Espinoza, 1993). This was still the period of committed politics in Chile where ‘the conquest’ (Espinoza, 1993) of emerging social sectors by political parties determined the shape of power relations significantly. In this sense, the social policies targeting popular sectors during this period were not the exemption to that pattern of social integration but rather the rule.

The increase in the number of illegal land take-overs during the late 1960s and the beginning of the 1970s meant that, by 1972, 272 “camps” or shanty towns existed in Chile, which encompassed more than 83,000 families (De Ramon, 1990; in Rovira, 2014:109). This is one of the factors explaining why since the election of Salvador Allende (1970–1973), and through the government of the Popular Unity Coalition,²² poverty was recognised as a widespread problem in Chilean society as a consequence of the country’s economic and social stagnation (Marquez, 2005). Nevertheless, under the ideological inspiration of the coalition in power, poverty was understood as a problem of exploitation whose resolution depended heavily on the abolition of the class privilege of the dominant sectors of Chilean society such as the bourgeoisie and landowners (Silva, 1993). In order to achieve this goal, social redistribution,

²² This coalition included the Socialist and Communist parties, in addition to the Movement of United Popular Action, the Left Radical Party, and the Independent Popular Action.

particularly ‘the redistribution of assets’ (Arellano, 1985:413), constituted a fundamental priority during Allende’s administration, translating into a series of structural reforms. In fact, during this period there was an intensification of the agrarian reform²³ in Chile, along with the establishment of a social area of the economy that sought to ensure the vast majority of the Chilean productive sector remained under state ownership²⁴ (Arellano, 1985; Van Der Ree, 2011). In 1971, the social expenditure of the country showed a 30% increase, resources that were spent on “the emergency plan” developed under Allende’s administration, which included the building of 79,000 social houses, along with the urbanisation of 120,000 territories across the country (Garcés, 2015). Apart from the housing sector, we found a tremendous expansion of milk programmes under Allende’s administration which implied a significant increase in the beneficiary population (from 650.000 in 1970 to 3.600.000 in 1973) as a result of the establishment of Allende’s signature milk programme: “The Half of Litre” (“*El Medio Litro*”) which promised to deliver everyday a half of litre of milk to every child under 15 years old (Goldsmith, 2020:77). Another significant social policy development was the creation in 1970 of the National Council of Kindergartens (JUNJI) (“*Junta Nacional de Jardines Infantiles*”) which by 1973 had opened 122 kindergartens where around 8.700 children were enrolled (Rojas, 2010; in Staab, 2017:62). A development of childcare services that was significant in terms of redistribution considering its non-contributory basis, since it was financed ‘out of general taxation’, delinking in turn childcare benefits ‘from the employment status and workplace characteristics of the mother’ (Staab, 2017:62).

Here it is relevant to highlight that the goals behind the redistributive measures encouraged by Allende’s administration encompassed the development of a socialist economic organisation, as well as the constitution of a “popular state” in Chile based on “popular power” (Marquez, 2005). In fact, in order to pursue this overarching social transformation, the popular power of “the united people” (*el pueblo unido*) and its “organised action” were recognised since the beginning as one of the key elements of the project. This is why under the Popular Unity government, the so-called “Popular Unity Committees” developed across the country, and in different contexts such as industries, populations (*poblaciones*), schools and so on, in order to connect directly “the people” (*el pueblo*) with the popular state (Marquez, 2005). This was part of the formula through which, again, a “true” democracy would be developed in Chile, which would allow the participation of the whole population ‘in the vital decisions’ of the country

²³ While in 1964 9.7% of landowners owned 86% of agricultural land, by 1974 6% of landowners owned only 5.2% (FOSUPO and UDP, 2011; in Rovira, 2014:110).

²⁴ It brought around 125 companies under state tutelage by 1971 (Van Der Ree, 2011:28).

(Allende, quoted in Cardemil, 1997:332; in Van Der Ree, 2011:27). In this context of political empowerment, however, there was a discussion inside the coalition in power about the role that popular and marginal groups, already mobilised by the urban housing crisis, should play in “the revolutionary process” (Garcés, 2015). In this sense, while the Communist party was in favour of a close articulation between the social demands of those groups with the social policies developed by the Popular Unity government, more radical left sectors identified that popular sectors should be able to both gain major levels of autonomy and carry out ‘new ways of exercising “popular power”’ (Garcés, 2015:43).

Overall, it can be concluded that along with the redistributive policies developed by the governments of both the Christian Democratic Party and the Popular Unity, there was active political work for “raising awareness” (*concientizacion*) among the population to be able to demand the expansion of social benefits (Olmos and Silva, 2010:5), particularly among popular and marginal social groups. In this sense, the activation of the political citizenship of the poor can be regarded as one of the most distinctive features of the new approaches to deal with poverty during these decades. Nevertheless, such political activation did not necessarily guarantee the full access of popular and marginal sectors to social citizenship rights.

Conclusion

This chapter analysed the configuration of the welfare regimes of the region prior to neo-liberal reforms through which social citizenship rights materialised and were institutionalised in the region. In this regard, it identified the general features shared by “social states” in Latin America during the period, such as the expansion of the ISI model, and its Bismarkian modality based on social insurance and formal employment relations. Both of these conditions were detrimental to the social integration of the poor as formal employment inclusion was limited, and formal labour inclusion and contributions determined access to social security – issues that were unattended by the political coalitions and corporatist politics that prevailed during the period of welfare expansion in the region. The second part of the chapter analysed the Chilean case, one of the “pioneer” countries in matters of social security development whose preliminary antecedents date back to the debates about “the social question” during the late-20th century, and to the 1920’s “social laws” that established the first legislation in matters of labour protection and rights. However, the institutionalisation and consolidation of the Chilean welfare regime occurred during the 1930s under “the Popular Front” coalition, and as in the

rest of the region under the ISI model. This was a significant period for the institutionalisation of social rights as a result of the expansion of public services in the education and health sectors, although it was less prosperous for the social protection of “the poor” as working-class and middle-class sectors were, in fact, the “constituencies” most favoured under the coalition in power. In this sense, in the same terms observed in the region, Chile was not the exception in regards to the weight that politics, in particular corporatist politics, had on matters of social citizenship and welfare entitlements. Nevertheless, during the 1960s there was an unprecedented interest in the social integration of the poor in Chile that, rather than focusing on welfare development, concentrated mostly on strategies of social promotion, collective empowerment and political activism in order to gain political representation, visibility and influence. This strategy of social integration gave prevalence to the strengthening of the political citizenship of the poor as the main channel to claim and apply pressure for welfare and social rights. However, this strategy ended abruptly in 1973 with the military regime of Augusto Pinochet, and the following process of structural reform carried out in Chile and the rest of the countries of the region during the 1980s, which put an end to the 20th century Latin American social states.

PART II

METHODS SECTION

“Social Assistance and Welfare Citizenship from the Perspective of Social Recognition: The Methodological Approach”

1. The Case Study

As identified in previous sections, one of the main concerns of this research is to identify the citizenship implications of the recent expansion of social assistance policies in Chile in terms of both social inclusion and recognition. In line with these interests, the primary research question addressed by this study is focused on: whether and to what extent have social assistance policies contributed to enhancing the citizenship status of “the poor” in Chile? Along with this main research question, the study encompasses two other subsidiary questions to be examined: 1) to what extent have social assistance policies helped to provide welfare beneficiaries with better living conditions and opportunities? and 2) to what extent has the expansion of social assistance provision contributed to promote the recognition of the poor as subject of rights? By empirically approaching these questions, the research seeks not only to identify the quality of the process of welfare inclusion developed in the country during the last decades, but also to distinguish the type of welfare citizenship to which groups in poverty, and targeted by social assistance policies, are accessing and experiencing under the recent expansion of social assistance in Chile. As argued by this research, the ability of social assistance policies to provide conditions of social recognition of the poor as subject of rights depends on three critical factors which are going to be properly analysed and discussed in subsequent chapters:

1. The process of targeting and selection of welfare beneficiaries as carried out by social assistance policies, and whether such mechanisms inflict any humiliating effects on those people targeted and selected by welfare programmes, thereby impacting negatively on beneficiaries’ social standing. It is therefore relevant to identify the processes of social identification and differentiation affecting welfare beneficiaries, particularly in matters of respectability and deservedness.
2. The general welfare infrastructure or regime under which social assistance policies develop. The main issue here is to identify how the type of welfare regime in place in the country shapes the logic, organisation and magnitude of social assistance policies. This involves consideration not only of the resources spent on social assistance but

also the anti-poverty approach underlying welfare programmes, along with the ways in which people's needs are constructed by anti-poverty programmes. Both issues that directly impact on the goals, methodological strategies and outcomes of social assistance programmes.

3. The extent to which social assistance policies properly appreciate the social contributions of the particular social categories targeted and selected as beneficiaries of welfare programmes. The main issue here is to distinguish whether participation in social assistance programmes is able to offer positive sources of discrimination or affirmative action for welfare beneficiaries in accordance with their particular circumstances and needs.

In order to explore these issues empirically, the research followed a qualitative case study approach. As defined by Simons (2009), case studies constitute an 'in-depth exploration from multiple perspectives of the complexity and uniqueness' of a particular subject or unit of analysis 'in a "real life context"' (Simons, 2009:21; in Thomas and Myers, 2015). In this sense, the case study has to be considered as a "design frame" through which the study of something is pursued in its "completeness", which involves approaching it from different "angles" in order to understand the interconnection between the different elements comprising it (Thomas and Myers, 2015). As such, this research explores a phenomenon through 'a variety of lenses' in order to reveal and understand its 'multiple facets' (Baxter and Jack, 2008:544). Following this approach, then, in order to explore the extent to which social assistance policies have contributed to enhance the citizenship status of "the poor" as well provided conditions of social recognition of the poor as subjects of rights, it was necessary to consider the interconnection of the following actors and instances.

Welfare beneficiaries. In the context of this research, welfare beneficiaries constitute the main unit of analysis since this social category corresponds to the population living in poverty in the country as well as to the section of the poor being targeted and selected by social assistance programmes. In line with the purposes of this research, the exploration of beneficiaries' direct experiences with social assistance policies is highly relevant since, in doing so, it is possible to identify and analyse the quality of the welfare inclusion of people living in poverty in the country. However, as this research seeks to explore the citizenship implications of this recent welfare inclusion, it was necessary to approach welfare beneficiaries from two different generations in order to distinguish with more clarity the effects of these

policies in terms of social inclusion and recognition. As such, the research examines the experiences of welfare beneficiaries from two different generations – those born before the 1980s, and those born after this period – since this corresponds to the decade when the current welfare regime of the country was established, which in turn constitutes the welfare context under which the expansion of social assistance policies took place. In this sense, even though one of the main purposes of this research is to explore ‘the lived experiences of “welfare”’ (Hudson et al., 2016:219) of current welfare beneficiaries in Chile, it recognises how the “generational habitus” of welfare beneficiaries shapes their views about welfare and social policy significantly. In fact, as argued by Moffatt and Higgs, the consideration of people’s generational habitus can illuminate how ‘the collective forces of structure and individual practice in relation to welfare accumulate over a lifetime’ (Moffatt and Higgs, 2007:461–462), influencing the ways in which people interact in welfare contexts. Such welfare interactions, as argued by this research, are determined by the degree of welfare institutionalisation, as well as by the logic under which the access and distribution of welfare benefits is organised. Consequently, approaching welfare beneficiaries from different generations allows us to identify different welfare trajectories as determined by the degree of development and institutional expansion of welfare and social assistance in Chile, along with the different generational habitus associated with those trajectories.

Social assistance programmes. In order to explore the “lived experiences of welfare” among beneficiaries it was necessary to select social assistance programmes that exemplify the conditions of welfare inclusion provided by current anti-poverty programmes in the country as well as their implications in terms of citizenship and recognition. One of the fundamental characteristics of case studies is “to put in place” the object of inquiry (Freebody, 2003), which means to consider its context of production as well as the circumstances of its development. As such, in order to explore the citizenship implications of social assistance policies from the perspective of welfare beneficiaries, it is necessary to consider the context of production of these experiences, which in the case of this research means to focus on people actually participating in social assistance programmes since such participation constitutes one of the main contexts where welfare beneficiaries’ experiences develop.

In the context of this research, then, two anti-poverty programmes were selected that form part of the “Subsystem of Securities and Opportunities” of social protection of the country. As identified in Chapter I, this subsystem encompasses the anti-poverty strategy of the country through the offer of four different anti-poverty programmes, all of them including the

components of “psychosocial support”, “labour support”, “cash transfers” and “preferential access to the state social network”. Consequently, two anti-poverty programmes from the subsystem were selected as case studies for this research as they successfully allowed the selection of welfare beneficiaries from two different generations. The first programme was the “Programa Familias” (“Families Programme”) targeted at poor households but whose participants corresponded mainly to adult women of working age in poverty. The second programme was the “Programa Vinculos” (“Bonds Programme”), which targeted older adults in vulnerability, the vast majority of them women. As a result of the selection of these two anti-poverty programmes as case studies, the research was able to compare the experiences of welfare beneficiaries from two different generation groups. It was also able to contrast the anti-poverty strategy displayed by each of these programmes, which although sharing similar components (psychosocial support, welfare support, cash transfers and preferential access to the state social network), showed significant differences in regard to the anti-poverty approach and the construction of beneficiaries’ needs. These differences, to a high extent, can be explained by the specific target groups of each programme, as well as by the categorical or means-tested targeting used to select welfare beneficiaries among the two social assistance programmes chosen as case studies in this research.

Welfare professionals. In the context of this research, the inclusion of welfare professionals as key informants was crucial considering how these professionals, particularly social workers, are in charge of implementing the system of social protection of the country at the local level, and are in direct contact with the particular groups targeted by social assistance policies. In the light of this mediating position, the analysis of the experiences of welfare professionals was particularly useful to explore how ‘the empirical and localized limitations’ through which social assistance programmes are implemented in particular social contexts impact on the ways in which ‘welfare beneficiaries’ are in conditions to ‘construct’ social programmes and benefits ‘as social rights interventions’ (Eiró, 2019:2). Beyond the legal status of the welfare entitlements and social assistance programmes delivered to people in poverty, this points to the power enjoyed by the “street-level bureaucrats” in charge of implementing welfare programmes, and to the ways in which their ‘discretionary actions can shape social policy, effectively transforming the citizenship rights of the poor’ (Eiró, 2019:2). Following Lipsky’s conceptualisation, street-level bureaucrats correspond to ‘public services workers’ such as teachers, social workers and police officers ‘who interact directly with citizens in the course of their jobs’ and enjoy ‘substantial discretion in the execution of their work’ (Lipsky, 1983:3). The actions of street-level bureaucrats are highly consequential in citizens’ lives considering the

ways in which these professionals are directly involved in socialising ‘citizens to expectations’ about public services, in determining ‘eligibility (...) for government benefits and sanctions’ and in overseeing ‘the treatment (the service)’ received by citizens in specific programmes (Lipsky, 1983:4). Such consequential and practical actions indicate the “implicit” ways in which street-level bureaucrats ‘mediate aspects of the constitutional relationship of citizens to the state’ (Lipsky, 1983:4). This mediation is particularly accurate in the case of social citizenship considering how the expansion of social rights has involved ‘the rise of large-scale welfare state bureaucracies’, which, through the control and direct delivery of programmes and services, has ended up determining the concrete ‘content’ of social and welfare rights (Hasenfeld, 1987:397; in Eiró, 2019:2).

From this perspective, it is possible to observe how the contemporary expansion of social assistance policies in Chile, as well as its institutionalisation under a proper system of social protection, has involved the constitution of a welfare-bureaucracy through which this new programmatic offer has been implemented throughout the country during the last decades. Consequently, it is through interactions with these street-level bureaucrats that the welfare inclusion of the poor is being carried out in the country – interactions that, as observed above, are highly consequential in terms of citizenship considering the influence exercised by welfare professionals on the access and distribution of social benefits, as well as on citizens’ expectations about state services and treatment. According to Auyero (2012), the state, and in this case the “welfare state”, ‘is both an abstract, macro-level structure and a concrete, micro-level set of institutions with which the urban poor interact in direct and immediate ways’ (Auyero, 2012:6). For the purposes of this research, however, the critical issue to be explored about these welfare interactions is how the current orientation and organisation of social assistance policies in Chile has shaped the encounters of welfare professionals with beneficiaries. These encounters constitute one of the crucial sites in which the welfare citizenship of the poor is forged and exercised through the access and distribution of welfare benefits and also through administrative treatment, as well as professionals’ actions and expectations about welfare beneficiaries’ entitlements and behaviours. From this relational and critical perspective towards the citizenship implications of social assistance policies, it is possible to distinguish not only the mediating role played by social workers on the process of implementation of anti-poverty programmes, but also the ways in which the profession is critically implicated in the process of (mis)recognition of the poor as a subject of rights. As a social worker myself, I can say that this implication results indeed critical as it implies to participate in social policy devices that while distributing welfare support with some potential

for securing minimal guarantees of social inclusion and wellbeing among lower income groups, it always implies to form part of the mechanisms by which the state regulate the living conditions and behaviours of “the poor”. In this sense, social workers’ interventions and interactions with groups living in poverty can always entail an act of state power, a critical issue that in several cases produce a series of questionings among social workers about their own professional practices, and the socio-political implications of their interactions and interventions with lower income groups as a result of their professional status.

Overall, from the qualitative case-study approach followed in this research, the interactions developed between professionals and beneficiaries in the context of the processes of implementation of current social assistance policies in Chile have to be regarded as constitutive of the welfare field (Peillon, 1998). This field of activity is characterised by agents occupying different positions in accordance with their volume of capitals, and with distinctive habitus or dispositions through which they have adapted to the conditions of inclusion prevailing in the welfare field. Of interest here is how agents engage in interactions that ‘are organized in terms of control’ (Peillon, 1998:221), which in the case of relief programmes translate into policing practices that aim ‘to secure the access to families and individuals’ in order to ‘fashion’ beneficiaries in accordance with the goals of welfare programmes (Peillon, 1998:218). Such control strategies displayed by welfare agencies are often ‘misrecognized’ as ‘caring’ as a result of the activation of symbolic structures incorporated in agents’ habitus, which help ‘to ensure compliance’ (Peillon, 1998:221). Nevertheless, control does not rule out resistance, which transforms the welfare situation into “a site of struggle” through the different practices or strategies displayed by the agents on the field. On the one hand are the welfare beneficiaries seeking access to a range of social benefits and services, if possible ‘at the highest level’, while also trying to minimise the stigma or ‘negative symbolic capital’ (Peillon, 1998:222) associated with the use of welfare. On the other hand, are the welfare professionals or officials in charge of delivering means-tested benefits, who police people in order to determine ‘those with a legitimate entitlement’ (Peillon, 1998:223). To a high extent, these are the dynamics of misrecognition traditionally associated with the implementation and administration of social assistance policies, which have contributed to institutionalise the different citizenship status of the poor, particularly in the welfare field. Nevertheless, since the contemporary expansion of social assistance policies in Chile, along with the establishment of the system of social protection of the country that has been guided by the logic of rights-based social protection aimed at securing minimal social guarantees, it is worth exploring whether and how this social policy framework has shaped the interactions of professionals and

beneficiaries in the welfare field. This relational dimension of citizenship is critical to analyse the quality of the process of welfare inclusion of the poor in Chile since it impacts on the extent to which this inclusion has been accompanied by an approach and treatment of beneficiaries as subjects of rights.

2. Data Collection and Sampling

In order to explore and analyse the experiences of welfare beneficiaries participating in the anti-poverty programmes selected as case studies for this research – that is, the “Families Programme” and the “Bonds Programme” – the study used qualitative interviews as its main method of data collection. The goal of qualitative interviews is to grasp ‘the subject’s perspective’ in order to understand his or her ‘mental categories, perceptions and feelings’ as well as ‘the motives’ underlying people’s actions (Corbetta, 2003:264). As this research focuses on exploring and analysing welfare beneficiaries’ experiences of participation in anti-poverty programmes in order to identify the impacts of current social assistance policies on the citizenship status of “the poor”, qualitative interviews proved particularly useful to connect with people’s perspectives on their lived experiences of welfare. As a result, in-depth interviews were conducted with welfare beneficiaries in order to explore their trajectories in the welfare field through the course of their lives, as well as to analyse in detail their specific experiences of participation in the programmes selected as case studies for this research. In addition, semi-structured interviews were conducted with professionals working in the implementation of the two anti-poverty programmes, including interviews with professionals working in other connected programmes and welfare institutions pertinent to this study. In total, 50 people were interviewed for this research, made up as follows.

Twenty-five interviews were conducted with welfare beneficiaries. Specifically, 12 with beneficiaries of working age from the “Families Programme”, and 13 with older-adult beneficiaries from the “Bonds Programme”. Most of the beneficiaries interviewed were women (23). This was in line with the selection criteria chosen for this research as the literature review indicated the current and historical predominance of women in welfare programmes, which was corroborated by the professionals working in the two anti-poverty programmes during the first round of interviews. In addition, the selection of welfare beneficiaries utilised a diversity criterion, whereby interviews were conducted with informants across the programme timeline – that is, some informants were at the beginning of participation in the programme, some were in the middle of the programme and some were at the end of the anticipated period of

participation, which in both programmes corresponded to two years. By doing this, the study could explore a range of experiences of participation, considering the particularities of all the stages contemplated by each anti-poverty programme. Among the sample of welfare beneficiaries, the youngest beneficiary interviewed was 28 years old, while the oldest was 81 years old. The vast majority of interviews were conducted in the informant's home. Interviews lasted from 20 minutes to one hour and 30 minutes. Beneficiaries were identified and approached according to the authorisation and information provided by the institutions and professionals in charge of implementing the two social programmes selected in this study. In this sense, the main strategy of recruitment used to select beneficiaries/participants for this research was based on the information provided by a "mediator" or "gatekeeper" (Kristensen and Ravn, 2015) which in this research involved the participation of the corresponding directors of each anti-poverty programme selected as case-study. Consequently, the contact details were requested (name, phone number, and home address) of beneficiaries from the 2 programmes selected as cases of study to approach and recruit the participants. As a result, I was given a list of 15 beneficiaries from each programme who were contacted through phone calls by the researcher in order to arrange the corresponding interviews in those cases where beneficiaries agreed to participate in the study.

Then, in this context, I found that the recruitment strategy used significantly facilitated the process of identification, approach and recruitment of participants, being able to interview 25 of the 30 beneficiaries included in the lists provided by the programmes' directors. Nevertheless, it is necessary to acknowledge the methodological and ethical implications of this particular strategy of selection and recruitment of participants as it involved a pre-selection of informants following decisions taken by the programmes' directors. Consequently, the list of beneficiaries provided probably included those more satisfied with the programmes, in other words, the less critical or resistant beneficiaries to such instances of state intervention. An issue that can impact on beneficiaries' dispositions to participate in the research, as well as on their evaluations about the programmes and state benefits in general, being perhaps inclined to show more positive than negative attitudes and opinions. However, since this research was not designed as an impact-assessment or evaluation, this bias was overcome through questions focused on reflecting on the participants' experiences in each social programme comprehensible. Based on the sociological approach followed by this qualitative case-study research, the interviewing process implied to explore people's participation experiences in the anti-poverty programmes selected concerning their previous welfare trajectories as well as their opinions and attitudes about how social assistance policies impact

on matters related to poverty, social justice, and citizenship rights in Chile. In this sense, even though this research approached participants in their status as welfare beneficiaries—a group that constitutes the target of state social assistance policies as a result of their class position and gender status—it was relevant to investigate how people experience such status. This implied to approach welfare beneficiaries as part of Chilean society, as citizens, to which it was necessary to explore and connect people’s experiences of participation in anti-poverty programmes with wider societal issues such as poverty, inequality, and social rights.

Apart from the interviews conducted with welfare beneficiaries, twenty-five semi-structured interviews were conducted with professionals working in the programmes and institutions selected by this research project. Interviews were initially conducted with professionals in charge of supervising and implementing the two anti-poverty programmes selected as case studies (the “Bonds programme” and the “Families Programme”); however, after the first round of interviews with this group, I decided to include professionals working in other key social programmes and services. These included professionals from: the “Habitability Programme” (*Programa de Habitabilidad*), implemented by municipalities, which offers housing improvements for people living in poverty; FOSIS (The Solidarity and Social Investment Fund), which plays a key role in the strategies of labour support in regards to the anti-poverty programmes of the country; the Ministry of Social Development at the regional level, which is responsible for the national implementation of the system of social protection. I also decided to interview professionals working in the “Opening Roads Programme” (*Programa Abriendo Caminos*). Even though this programme is currently run by external institutions (NGOs) targeting children and adolescents who live in households with one adult in prison, it operates with the same methodology of the two anti-poverty programmes selected as the case studies of this research, and thereby was able to provide valuable data about the implementation and impact of the current anti-poverty programmes in Chile from the point of view of external state partners. Lastly, considering the pivotal role played by local municipalities in the implementation of the two anti-poverty programmes selected as case studies for this research as well as in terms of the articulation of the state social offer at the local level, this research conducted interviews with professionals working in the “Department of Development and Social Promotion” of the municipality in which this study was carried out.

Most of the professionals interviewed for this research were female social workers (22), whose work trajectories ranged from three months to 28 years. The vast majority of the interviews were conducted in professionals’ workplaces, often with more than one professional at a time.

Interviews lasted from 40 minutes to two hours. To identify and approach these professionals, I used both the public information available about the institutions and professionals working in the system of social protection, as well as the contacts details provided by the professionals interviewed. Only in one case I made use of my own personal networks to identify one of the professionals to be interviewed in this research, which corresponded to the case of the director of the “Bonds Programme” which was one of the first interviews carried out in this study, and that proportionated me with the contact details of key representatives from the Ministry of Social Development, all of which is detailed in subsequent sections related with the sample targeted by this research.

In terms of sample representativeness, the case study approach followed in this study was not guided by the objective of generalisation but rather the exploration of the complex interaction of several factors in few particular cases (Thomas and Myers, 2017). In this sense, rather than the “extensiveness” associated with probability sampling, case studies are defined by the “intensiveness” of their inquiries. The same is true for the qualitative interviewing method, which rather than aspiring to represent and ‘reproduce’ the features of a population, it follows a criterion of ‘substantive representativeness’ with the aim of covering a range of social situations through which ‘stories are reconstructed’ (Corbetta, 2003:268–269). In the light of this, this study utilised purposive sampling, a form of non-probability sampling, through which it sought to sample particular individuals in accordance with the characteristics relevant to the object of study. In this sense, rather than seeking to represent and generalise, the main goal of this study was to explore and analyse the experiences of female welfare beneficiaries from two different generations participating in two different social assistance programmes, including their interactions with the welfare professionals and agencies in charge of implementing the programmes selected as case studies for this research. It is at the intersection of all these factors that the study aimed to better capture the complexity involved in the “welfare situation”, of which the qualitative case study approach and the purposive sampling followed in this research were particularly well suited. Nevertheless, in order to support and strengthen the analysis and findings produced by this small-scale case study and as part of its strategy of triangulation, the research made extensive and systematic use of secondary sources, including quantitative and qualitative empirical studies, social programmes’ evaluations, the analysis of official social policy documents and statistical databases. Consequently, the quality and probative value of the data obtained was based on the thickness and exhaustiveness through which the experiences of participation of welfare beneficiaries in the two different anti-poverty programmes, from two different generations,

were explored and analysed. Also, apart from the methodological procedures followed to guarantee a rigorous approach and selection of welfare beneficiaries in accordance with the interests of this study, as described in previous sections, the analysis of beneficiaries' experiences implied the triangulation of the beneficiaries' accounts with those of welfare professionals plus the consideration of secondary sources which contributed to reassure or contrast the findings. Consequently, the methodological procedures applied at different stages helped to secure the production of an illustrative and well-informed qualitative case-study.

3. Data Analysis

After being taped and transcribed, the 50 interviews with both the welfare beneficiaries and professionals were analysed through qualitative content analysis, which allowed for the identification of salient topics, as well as their thematic organisation for purposes of discussion (Cricher, Waddington and Dicks, 1999). Consequently, in order to explore the citizenship implications of the contemporary expansion of social assistance policies in Chile from the perspective of social recognition, the analysis of the empirical material produced by this research was developed via the following dimensions and stages:

1. **Analysis of the anti-poverty strategy of the country based on the experiences of welfare beneficiaries participating in the two social assistance programmes selected as case studies for this research.** The purpose here was to analyse the quality of the conditions of welfare inclusion provided by each of the programmes selected for this research. This included scrutinising how each programme constructed people's needs, the programmes' methods of targeting and selection, and the anti-poverty approach and methodological strategy followed by each programme. Through this, it was possible to analyse the anti-poverty strategy of the country, along with its goal of securing the social inclusion of the poor, in accordance with each of the selected programmes. To a high extent, each programme was determined by its specific target group and by how it approached the particular needs, circumstances and disadvantages affecting that specific group of welfare beneficiaries. Based on this, it was possible not only to analyse the distributive effects produced by the anti-poverty strategy of the country in accordance with its operation and implementation in each welfare programme and with different sections of the poor, but also to explore and identify the implications of this strategy in terms of social recognition. This involved the analysis of the dynamics of identification and

social differentiation encouraged by each social programme among welfare beneficiaries, and in turn the extent to which these programmes constituted a source of positive discrimination or affirmative action for people living in poverty according to specific axes of differentiation such as people's gender and generational status.

2. **Analysis of welfare beneficiaries' sense of entitlement and citizenship identifications.** Here the analysis was focused on identifying to what extent the participation in social assistance programmes, as well as the reception of other welfare benefits, was regarded by the group of welfare beneficiaries interviewed for this research as their right. Consequently, welfare beneficiaries' attitudes and opinions about their entitlements were scrutinised in order to identify the referents from which they justified (or not) their right to welfare support. This involved identifying the sources of legitimation from which welfare beneficiaries were or were not able to identify themselves as subjects of rights. By doing this, it was possible to analyse not only the central role played by beneficiaries' conceptions and evaluations about citizens' social contributions on their sense of entitlement, but also to determine the critical role played by the methods of targeting and selection currently in use in the country on the ways in which welfare beneficiaries can claim their right to welfare. This relates not only to the practical functioning of these methods but also the associated moral implications, particularly in regards to welfare beneficiaries' deservedness and poor people's respectability. This analytical stage formed part of the process of data triangulation, and added greater complexity to the discussion on the citizenship implications of current social assistance policies in Chile from the perspective of recognition. Such discussion required analysis not only of the conditions of welfare inclusion prevailing among the social assistance programmes through which the anti-poverty strategy of the country is being carried out, but also of the impact produced by such conditions of inclusion on the processes of self-identification experienced by welfare beneficiaries.
3. **Analysis of the terms and conditions of inclusion of the poor prevailing in the welfare field in the light of the experiences of welfare professionals engaged in the local implementation of the national system of social protection.** Here, the analysis was focused on identifying the ways in which the contemporary expansion and institutionalisation of social assistance policies in Chile, along with the rights-based approach guiding the development of social protection policies in

the country, have impacted on the status of the poor in the welfare field. As such, it examined the impacts of social assistance policies on people's self-identifications and behaviours, based on the experiences of welfare professionals interacting everyday with lower income groups depending on welfare support. This involved questioning to what extent the current citizenship orientation of social assistance policies has been able to encourage the self-identification of welfare beneficiaries as rights-holders. In this sense, this analytical stage was part of the process of data triangulation through which the analysis of welfare beneficiaries' attitudes towards their entitlements came to be supplemented with those of welfare professionals engaged in the local implementation and direct delivery of social benefits. Based on professionals' mediating position, this stage sought to identify the citizenship implications of current social assistance policies in Chile considering, in particular, the way in which they structure interactions in the welfare field. This involved analysing the subjective and moral implications associated with both the anti-poverty strategy for working with the poor in Chile, and the administrative treatment received by welfare beneficiaries in accordance with the methods of targeting and selection determining the access and distribution of social assistance under the current welfare regime of the country.

4. Fieldwork and Ethics

The local context selected in which to carry out this research was the city of Valparaíso, the provincial capital of the third largest region of Chile. The system of social protection was in full operation in this city at the time of research, and was under the direct regional supervision of the Ministry of Social Development due to the status of the city as a provincial capital. As a result of direct contact with this key institution, it was possible to obtain formal authorisation to carry out all the interviews conducted for this research. Consequently, the study was able to meet the ethical requirements established by UCL Research Ethics Committee through the ethics application number 9933/001. Apart from securing official authorisation to conduct this research, participants in this study were asked to sign consent forms in order to confirm their willingness to be interviewed for this research, and were informed that participation in this study was completely anonymous and voluntary. As such, before beginning the interview, participants were provided with an explanation of the characteristics and conditions of the

research, were asked to sign the consent form, and were told they could keep a copy with them in case of any doubt or in case they wanted to stop their participation at any time during the study.

The period of fieldwork involving interviews with welfare beneficiaries and professionals from the city of Valparaíso in Chile was developed in two consecutive stages. The first period was between December 2016 and April 2017, during which I was able to conduct 37 interviews. The second period was between December 2018 and January 2019, during which I conducted 13 more interviews. Apart from the formal procedures followed in this research to approach welfare beneficiaries and professionals, both initial contact and interaction with the specific social categories targeted by this research was helped by my own professional background as a social worker from the city of Valparaíso. In this sense, entry to the field was facilitated by my previous knowledge about the institutional organisation of the welfare field at the local level, as well as my own professional habitus that allowed me to interact easily with “colleagues”. In other words, as a researcher, I found myself in good conditions to understand the technical language and social policy nomenclatures used by professionals, as well as to comprehend the dilemmas affecting professionals when implementing social assistance programmes and working with people in poverty targeted by these policies.

Further, my professional status as a social worker helped me greatly when approaching welfare beneficiaries considering how the profession is socially identified with the administration and distribution of social assistance benefits. In this sense, and as people implicitly or explicitly let me know, a visit by a social worker can constitute a positive event since it can mean selection in one particular programme or the resolution of one particular issue. In fact, on several occasions I made use of my professional knowledge to clarify some doubts among people about the specific functioning of or application to specific programmes or benefits. In addition, I also made use of other professional tools when interviewing people, particularly in those cases when beneficiaries cried when telling me about their family problems and/or socio-economic hardship – issues that are intrinsically related with the access and quality of welfare support, and its implications on households’ everyday reproduction, an issue particular salient for poor women as they are frequent the households’ members struggling daily to make ends meet.

Up to this point, it is relevant to consider how apart from their contribution or not to the realization of social citizenship, social policies constitute a field of state action designed to secure social reproduction (Molyneux, 2007). A critical issue in the case of “the poor” as their capacities of action are very much conditional to the ‘availability of social policies’ as they can ‘either facilitate or constraint survival, social mobility, and reproduction’ (González de la Rocha, 2001:73). In the light of this, it is possible to see how researching the current expansion of social assistance policies in Chile constitutes an opportunity for identifying how the access to and provision of social assistance policies had impacted on the survival strategies and conditions of social reproduction of “the poor”. In fact, through the analysis of the experiences of the female beneficiaries from different generations interviewed for this research, it was possible to distinguish the impact of social policies on the process of daily survival and reproduction, as illustrated in subsequent empirical chapters. Experiences that, apart from indicating the concrete ways in which social policies are involved in the process of daily reproduction, were highly emotional in the sense that they were connected with feelings of stress, anguish, and hopelessness, experienced during the past or the present, as a result of women’s struggles and efforts for securing household’ survival and wellbeing, particularly of their children. In the light of this, it is not difficult to understand why some of the interviewees cried when retelling their experiences in the anti-poverty programmes, and in the reception of welfare benefits. Such experiences are consequential for people, thus make a difference that can be judged as “minimal” since it is “only” about basic reproduction. Nevertheless, daily reproduction can be lived critically for those with less resources but with the social responsibility of making ends meet as is the case of poor women. In the light of this, it is possible to argue if the interviews became instances to communicate and give social visibility to these undervalued experiences; and to disclose part of those hidden emotions that must be dealt individually as part of the struggles that the poor have to make to survival. Overall, my interactions with welfare beneficiaries were not exempt from psychological dynamics that remind us that the social workers in Chile are also known as “the psychologist of the poor”, requiring me to express respect and empathy as part of the professional role of understanding the emotional implications of people's daily circumstances and sacrifices, even when conducting the research

To some extent, I was an agent in the welfare field, taking the position of a social worker with all the expectations and demands associated with the profession. This required me to critically manage beneficiaries’ expectations about what they could or could not obtain from their participation in this study – an issue that is always difficult for social workers to manage as

they encourage people to participate in different state projects whose “benefits” do not always coincide with the interests and needs of beneficiaries. In fact, even though in this research the term “welfare beneficiary” is used frequently as a way to identify those sectors of the poor depending on and using welfare support, it does not neglect people’s agency when participating in the welfare field. Like social workers, beneficiaries constitute another agent in the field of social assistance whose interactions with welfare agencies as well as with social workers are determined by external definitions of need, as well as their own strategies to deal with necessity. In this sense, interactions with social workers do not only constitute an instance of state social control of the poor but also a space where the poor can claim and make use of their right to welfare support. In several cases, this involves instrumental interactions with social workers in order to obtain information about which procedures to follow when applying to certain benefits or how to receive some psychosocial support while in circumstances of emotional stress or depression. In this sense, even though the term “welfare beneficiary” has been traditionally associated with “dependency”, “passivity” and in the case of Latin America “assistentialism”, in practice it does not rule out agency, strategic action or critical capacities from those sectors of the population that have to occupy and manage such a subordinating position in the welfare field.

Finally, in terms of my own positionality, it is possible to argue that I was an insider/outsider: “insider” as I was a Chilean social worker woman from the city of Valparaíso, the context in which this research was carried out. The “Insider position” that, as analysed before, helped me to gain access to the field, and understand the rules and language managed by professionals as well as professionals’ struggles when working with social policies and vulnerable populations. It that also helped me when approaching and interviewing welfare beneficiaries as a result of the positive dispositions showed by beneficiaries to talk with a social worker, as well as the professional tools managed to provide technical orientation or psychosocial contention in those cases where these actions were needed. On the other hand, I was also an “outsider” since I was conducting the research in my status of a PhD student enrolled in a highly prestigious foreign university, and as an academic from one of the traditional schools of social work in the region. In this sense, I recognize that my class position, in terms of the high volume of cultural capital associated with my PhD and academic status, could impact on the interactions developed with social workers as they could feel particularly compelled to show or display their knowledge and critical opinions about current social assistance policies in Chile—reflections that were welcome by this research, but that could be

signalling professionals' worries of being negatively evaluated or judged by a social worker with considerable theoretical knowledge about the field of social policy.

In the case of welfare beneficiaries, I must recognize that my "outsider position" was experienced with more difficulties since the distance that separated my class position from theirs was considerably wider. As is going to be documented in subsequent empirical chapters, while younger generations of female beneficiaries had in several cases not completed their secondary education, those from older generations had in few cases completed their basic education. Consequently, it was difficult to say and explain that I was conducting this research as part of the PhD programme in which I was enrolled in London, a high educational degree that in several occasions was unknown for my interviewees. In this sense, it was more understandable to say that I was a social worker from a local university which was known for people. Overall, it was easier to say that I was simply a social worker. A professional status that, even though still placed higher in the social structure in comparison to the subordinated social positions occupied by my interviewees, was symbolically closer as a result of the welfare trajectories developed by beneficiaries through which encounters with social workers was a common experience. Symbolic closeness that nevertheless did not eliminate the asymmetry of power that shaped the interactions developed with the group of welfare beneficiaries interviewed for this research, something that was expressed and possibly perceived by people my knowledge, way of speaking, and clothing. All signs of the particular habitus associated to my social position in Chilean society which is considerably higher than that occupied by welfare beneficiaries. Social distance that in the case of professions like social work is amplified as a result of the position occupied in the welfare field where these professionals can manage a relative degree of power and authority when working in public institutions and implementing state social programmes. As a result of these social and symbolic differences shaping the interviewing situation, it could happen that interviewees felt uneasy interacting with me, something that perhaps expressed through feelings and attitudes associated with insecurity, doubt, shyness, and embarrassment which in some cases, specially at the beginning of the interviewees, could prevent people to speak freely or more comfortably about their experiences in the welfare field.

On the other hand, it is necessary to acknowledge how my identity and position as a social worker could lead interviewees to perform "as beneficiaries" while interacting with me, making use or bringing to the interviewing situation a wide repertory of social representations about how a welfare beneficiary should be and act. A repertory that included different emphasis

about the stories and subject positions taken by beneficiaries during the process of interviewing, and that translated, for instance, in some people identifying and presenting themselves as “poor” as a result of their extremely precarious life trajectories, or because their current household conditions. An identification that dramatically highlighted the state of permanent necessity that affected people, considering not only the socio-economic effects of being always needy but also the impacts of this situation on people’s health, and in particular, their mental health. To some extent, it was a social representation of “poor welfare beneficiaries” associated to “the suffering poor” (“*pobres sufrientes*”). Different from this, other way in which beneficiaries presented themselves when interacting with me was as “hard-working people” struggling for making ends meet. What was at stake here was presenting themselves as part of “the deserving poor” (“*pobres merecedores*”), highlighting their independent efforts and initiatives for securing their living conditions without much dependency from the state. In fact, one of the most critical factors behind this social representation of the “good welfare beneficiary” was to try to differentiate themselves from the other section of the poor, the “undeserving poor” that expect to be given everything for free, lying about their real state of necessity, and being lazy. A social representation of the “deserving poor” that, as identified empirically by this research, shape the repertoires of both old and young generations of welfare beneficiaries in Chile, but that has strengthen considerably among younger generations as a result of the “meritocratic” normativity behind current entrepreneurship anti-poverty programmes that appeal not only to the “deserving poor” or the “working poor” but now to “the entrepreneur poor” (“*los pobres emprendedores*”) who are able to take advantage of any opportunity to better themselves independently. It is in relation to these repertoires and representations about the “good welfare beneficiary” articulated by my informants that I can identify the way in which my particular status as a social worker shaped and affected the process of interviewing, and consequently, the type of answers provided by group of welfare beneficiaries interviewed for this research.

CHAPTER IV

Welfare, Family Wellbeing and Women's Work: A First Look at the Contemporary Strategy of Social Inclusion of "the Poor" in Chile

Introduction

The purpose of this first empirical chapter is to analyse the strategy of social inclusion of the groups living in poverty in Chile in accordance with the experience of welfare beneficiaries participating in one of the anti-poverty programmes that form part of the "Subsystem of Securities and Opportunities" in the current system of social protection. In order to do so, the chapter focuses on the experiences of 12 female welfare beneficiaries participating in the "Programa Familias" ("Families Programme"), one of the two anti-poverty programmes selected as case studies in this research. By doing this, it analyses the quality of the strategy of social inclusion through welfare that is currently in place in Chile, and considers the impacts that the construction of people's needs by the "Families Programme", along with the methodological approach to deal with poverty, have in terms of distribution and social recognition. It considers the extent to which participation in this anti-poverty programme contributes to improve people's living conditions, as well as the implications of participation in terms of identification and social differentiation for welfare beneficiaries. Based on this, it explores the conditions of inclusion prevailing in the welfare field in Chile, and considers the socio-economic impacts associated with selection in anti-poverty programmes. Beyond that, and in accordance with the main concerns of this research, the chapter analyses the quality of this welfare inclusion and considers the way in which selection and participation in social assistance programmes constitutes a source of respectability or disrespect for people living in poverty who are targeted by welfare programmes.

1. "Programa Familias": Goals, Strategy and Targeting Criteria

The first anti-poverty programme selected as a case study for this research was the "Programa Familias" ("Families Programme"), which since 2013 came to replace the emblematic "Bridge Programme", the key component of the previous "Chile Solidario" System. According to the Ministry of Social Development (MIDESb, 2017), the main purpose of the "Families Programme" is that families and persons can sustainably overcome extreme poverty through the development of 'capabilities' and 'working activities' that allow people to obtain an autonomous income (MIDESb, 2017:5). In order to achieve that, the programme seeks to

provide a series of ‘securities and opportunities to families’ that find themselves in extreme poverty and vulnerability in order to promote access ‘to better living conditions’ (MIDESb, 2017:5) among this group. Regarding the anti-poverty strategy displayed by the programme, there are three characteristic components of all the anti-poverty programmes that form part of the “Subsystem of Securities and Opportunities” – namely, psychosocial support, labour support and monetary transfers – lasting for a period of two years, during which the “Families Programme” expects to enhance ‘the development of the family system’ (MIDES, 2016b:23). This is a “systemic” approach towards a family’s development that in terms of methodology is based on a “wellbeing matrix” that defines six wellbeing dimensions (education, health, housing and environment, work and social security, income, and support and social participation), which constitute the areas to work with the households-beneficiaries of the programme in order to improve their living conditions (MIDES, 2016b). Under the programme’s logic, advancements in these areas are regarded as “wellbeing achievements” necessary to improve the quality of life, as well as the social integration of poor households. Advancements in such dimensions should reflect the ‘desirable effects’ of social development as well as ‘the effective exercise of social rights’ through conditions that guarantee people are able to achieve basic levels of education and good health, as well as to work and be paid a good-enough income, and to live in decent housing, among other indicators (MIDES, 2016b:17).

In regard to the definition and selection of welfare beneficiaries, the “potential” population of the “Families Programme” corresponds to the households living in extreme poverty in Chile, which are those identified by the National Survey of Socio-economic Characterization (CASEN) through the use of the poverty lines method. The last CASEN survey identified that, in 2017, 2.2% of households lived in extreme poverty, a percentage that amounted to 128,081 Chilean households (CASEN, 2018). It is in reference to that number that the “objective” or target population of the “Families Programme” is defined. In this case, the households selected by the programme must belong to the first 10% and 20% of the socio-economic section of the “registry of households”, which has been the targeting mechanism of the country since 2016,²⁵

²⁵The social registry of households operates as an instrument of socio-economic qualification applied to households in order to support the selection of users entitled to social benefits (MIDES, 2016d), which incorporates not only a household’s self-reported living conditions, but also administrative records produced by several public and private agencies in matters of education, health, work, social security, taxes, and so on. Both sources of information help, then, to locate each household in a particular socio-economic section, attending to: (a) the sum of the incomes produced by all the household’s members; and (b) the size of the households. In fact, one innovation introduced by this new targeting mechanism is that the identification of the household size is corrected by a “needs index”, which ‘recognizes’ major levels of need in larger households, in those with members in specific age groups (younger than 17 or older than 60), and where some of the members suffer from dependency (moderate or severe) (MIDES, 2016d:65).

with income levels under, first, the extreme poverty line and, secondly, the poverty line, both lines determined by the CASEN survey²⁶ (MIDES, 2017b:5). Further, the selection of beneficiaries considers the application of additional social vulnerability criteria that give priority to poor households in which there are pregnant women, dependants, older adults, younger people and children, single-parents, and female household heads (MIDES, 2017b:5). Notwithstanding the above criteria, the final number of beneficiaries selected by the programme remains conditional to the levels of funding assigned to the programme each year by the Ministry of Social Development, which in 2017 amounted to US\$33,839 (MIDES, 2017b).

2. The Beneficiaries: A Closer Look at the “Units of Intervention”, the Participants and Their Living Conditions

In 2017 the total number of beneficiaries selected by the “Families Programme” across the country corresponded to 103,410 households in extreme poverty (MIDES, 2017b). In terms of the local implementation of the programme, in 2016, 3,141 beneficiaries corresponded to poor households from the V region of Valparaíso, which includes the district of Valparaíso,²⁷ the local context in which this case study was carried out. Regarding the coverage of the “Families Programme” in this particular district, I was informed by the professionals interviewed for this research that in 2017, 906 poor households were selected as beneficiaries of the programme, while 908 poor households were selected in 2018. In this local context, I was able to interview 12 women, who were members of the households selected by the “Families Programme” in the district. Among these women, seven were married, two were single mothers, two cohabited, and one was separated. In terms of household structures, six of 12 women interviewed for this research were part of two-parent, nuclear households, while four were part of two-parent, extended households. In the case of the two remaining women, one belonged to a single-parent, nuclear household, while the other one was part of a single-parent, extended household. The predominance of two-parent, nuclear households among the beneficiaries interviewed for this research seems to be in line with the high incidence of this household

²⁶ According to the 2015 CASEN survey, “the poverty line” corresponds to the minimum income that a household needs to satisfy their nutritional and non-nutritional needs, while the “extreme poverty line” corresponds to two-thirds of the poverty line, both lines being sensitive to household sizes (MIDES, 2016d).

²⁷ According to the political and administrative organisation of the country, Chile is divided into 15 regions. Each region has a number of different provinces and districts. In the case of the V region of Valparaíso, it has eight provinces, among them Valparaíso, which has seven districts. Among the districts that form part of the province of Valparaíso is the district of Valparaíso – the provincial capital and the district where this research was carried out.

category among the 161,185 families selected by the “Families Programme” across the country during the period 2013–2016, which corresponded to 32.48%, the second largest category after single-parent, nuclear households, which represented 33.29% of the households selected by the programme during the same period (Reineger et al., 2019:7–8). This predominance of single-parent, nuclear households, seems to be explained by the high incidence of this category among the households living in poverty in Chile, which according to the 2017 CASEN survey corresponded to 10.7%, followed by 6.7% of two-parent households (CASEN, 2018).

In the light of the above, it is relevant to observe how in the context of welfare programmes, single-parenthood among households living in poverty in Latin America has been strongly associated with the presence of female heads of households. Indeed, among the 7.6% of households living in poverty in the country in 2017, there was a major incidence of poverty among households headed by women, amounting to 9.2% of total households, against the 6.4% of those headed by men (CASEN, 2018). According to the experiences of the professionals working in the “Families Programme” in the district of Valparaíso, the “typical” beneficiary corresponds precisely to ‘single-women with children and an absent father’. Even though this was not the majority of cases among the sample of beneficiaries interviewed for this research, it seemed to be the “norm” in the “Families Programme” considering that, between 2013 and 2016, 66% of the families selected by the programme across the country corresponded to households with female heads, against the 33.99% of households headed by men (Reineger et al., 2019:7–8). Beyond that, it is important to highlight how the significant presence of women in anti-poverty programmes in Chile and the region is by no means only determined by the current structures of the households living in poverty. In fact, as widely noted by scholars, the current tendency to target families or poor households by the anti-poverty programmes of the region, particularly in the case of conditional cash transfers programmes, has involved in practice working with “poor women” either as the “representatives” of the family group or as the current heads of the households (Arriagada and Mathivet, 2007; CEPAL, 2004; Daeren, 2004). This trend has also been identified in Chile in previous “Chile Solidario” system (Ceballos, 2015; Tabbush, 2011), and according to the professionals interviewed for this research is still the case in the “Families Programme” as women are in fact the household’s members that end up participating in the programme either because of pragmatic or cultural considerations, as discussed further below.

Considering the previous dynamics of targeting and participation among anti-poverty programmes in the region, and in particular Chile, it is not possible to analyse the experiences of beneficiaries in this research without distinguishing the differences that exists between, on the one hand, the “beneficiaries” as defined by the programme’s guidelines, corresponding to families in extreme poverty, and on the other hand, the programme’s real participants, which in most of the cases correspond to poor women. This explains why I interviewed only women in this programme as they are the ones working with the professionals, and are the family members that must assume, and then experience, all the “opportunities” and responsibilities associated with being selected as a welfare beneficiary. From the qualitative perspective followed in this research, this is an important difference since the beneficiaries’ experiences to be analysed here correspond to those of poor women who as a result of their gender status inside the family and also in the welfare field, are included in the “Families Programme” as representatives of their households. In this sense, and as identified throughout this chapter, gender shapes significantly the experiences as well as the conditions of participation of poor women in the “Families Programme”, which provides the first clues about the gender implications of the strategy of social inclusion of “the poor” currently in place in Chile.

Following the above considerations, it is necessary to understand which women are participating in the “Families Programme”, especially as the information and definition provided by the programme’s guidelines tell us nothing about the fact that the project of social inclusion of poor families to be carried out by the “Families Programme” is heavily dependent on the participation and engagement of poor women. In the context of this research, the first thing to highlight about the women-beneficiaries of the programme is their accumulated experience of participation in the country’s social assistance programmes. Among the 12 women interviewed for this research, four had previously participated in the “Bridge Programme” of “Chile Solidario”, five were selected by the FOSIS’s entrepreneurship programmes, and one had previously participated in the “Opening Roads Programme” of the current “Subsystem of Securities and Opportunities” targeting children with one of their responsible adults in prison. Additionally, three of the 12 women obtained social housing subsidies. As we can see, the selection and participation in the “Families Programme” is by no means the first time that this group of 12 women have been part of the anti-poverty programmes of the country as indicated by their trajectories in the welfare field. These welfare trajectories have developed as a result of the systematic offer of social assistance programmes in the country since the 1990s, particularly since the creation of FOSIS with its entrepreneurship social programmes, along with the establishment of “Chile Solidario”.

Women's trajectories as welfare beneficiaries also signal the significant levels of rotation and repetition of welfare beneficiaries among the anti-poverty social programmes developed in Chile during the last few decades, as recognised by the professionals interviewed for this research. This is regarded as critical as it shows the failures of the anti-poverty strategy currently in place in Chile:

'... sometimes you see one successful case, but most of the families [selected by the "Families Programme"] entered the "Bridge Programme", then "Chile Solidario", and they are still in the same [socio-economic situation].'

(Social Worker 1, Families Programme)

'[You see] families from the "Bridge Programme" that are now [in the "Families Programme"]. So, you say, "if they went through the "Bridge Programme", why is this family here again?" If it is assumed that the "Bridge Programme" was also aimed at overcoming poverty (...), then these families should not reappear [in the current "Families Programme"] if they had a successful process and graduated...'

(Social Worker 2, Families Programme)

To some extent, it is possible to argue that the constant repetition of beneficiaries among the anti-poverty programmes developed in the country during the last few decades is indicative not only of the persistence of poverty among lower income groups in Chile but also of the dynamic nature of poverty as well. It is important to highlight here that notwithstanding that the country has exhibited good records in matters of poverty reduction since 1990 onwards, the measurement of such process has been done through a particular methodology, which is that of the "poverty line methods". This methodology constitutes, in essence, an absolute measure of poverty as it establishes a certain level under or above which people are classified as poor or non-poor. This classification is the result of a static measurement of poverty that is not able to capture the dynamic nature of poverty in Chile. In fact, based on the analysis of the 1996–2001 CASEN survey panel (longitudinal) database, Nielson et al. (2008) found that low-income groups in Chile find themselves frequently either entering or exiting poverty, which indicates how the poor population of the country is quite "transient" in nature. Understanding "transient poverty" as 'the proportion of households which were poor in either 1996 or 2001' but not in both years as would be the case of poor households in "chronic poverty", Neilson et al. found that 'more than half of all poor households (54%) in 1996 were not poor in 2001', while 11.4% of non-poor households in 1996 were poor by 2001, which amounted to 46% of all households living in poverty in the country during 2001 (Nielson et al., 2008:219). These are results that

significantly challenge 'the apparent Chilean success' in matters of poverty reduction since they indicate that many more households have experienced transient poverty (Nielson et al., 2008:254) than what is appreciated under the official poverty line methods. This issue points to the high vulnerability to poverty that exists in Chile, and can be explained, to a high extent, by the significant influence exercised by labour dynamics, considering how they determine the income movements that lead households to enter into and exit from poverty (Nielson et al., 2008:253).

In light of the above, it is not difficult to understand the constant repetition and rotation of welfare beneficiaries among the social policies in place in the country, something that in practice means the constant participation of poor women among welfare programmes due to structural conditions that have allowed these women to accumulate a trajectory as welfare beneficiaries. These structural conditions, as noted above, include the high vulnerability to poverty identified among lower-income households in Chile, a situation that is mostly determined by labour dynamics and its impacts on households' income. In fact, this was the case among the women's households included in this research whose living conditions were mostly determined by the very precarious labour situation of their members. Indeed, in regards to the group of 12 women interviewed for this research, all were part of large households (six members on average) with little children and grandchildren, who nevertheless struggled to make a living by engaging in informal activities in or outside the home that allowed them a more or less permanent source of income. These female productive activities, even though small and precarious, were highly significant if we consider the types of low-skilled jobs which their male partners have access to. In fact, in the case of the group of women interviewed for this research that were either married or that cohabited (nine), it was found that their partners were engaged in diverse low-income occupations, including the following types of jobs: building workers (three); truck drivers (one); bus-assistant drivers (one); dock workers (one); and informal peddlers (2).

The precarious labour situation of both the female and male members of the households selected by the "Families Programme" is in line with the current dynamics of poverty observed in the Latin American region where the vast majority of poor people 'work to be poor' (Grossman, 2000; in Daeren, 2004:4). This trend is also observed in Chile (Vargas, 2014; Espinoza et al., 2013), and explains why in accordance with the multidimensional measurement of poverty currently in use in the country the dimension with primary incidence of household poverty is "work and social security" (31.1%) (CASEN, 2018). It is interesting to

observe here how the major incidence of this dimension is mostly explained by the predominance of workers without social insurance (30.7%) rather than by people “not working” (9.8%) or “without pensions” (10.7%) (CASEN, 2018), which points to the quality of the jobs that lower income groups have access to in current Chilean society. Although the “occupation rate” (which corresponds to the percentage of the population that work in productive activities either as wage or non-wage workers) is considerably lower among people living in poverty in comparison to the non-poor population (33.1% against 54.7% (CASEN, 2018)), the conditions of labour insertion of “the poor” are considerably more precarious and informal than the non-poor population. Indeed, while 58.5% of people living in poverty corresponded to “wage workers” (75.7% in the case of the non-poor population), 32.9% of people living in poverty were “wage workers without labour contracts” (only 14.1% in the case of those non-poor), while 56.2% corresponded to poor wage-workers “without social security contributions” (as opposed to 30% in the case of the non-poor) (CASEN, 2017). Hence, labour informality is still one of the most salient features of the social integration of “the poor” in Chile since in most cases they have access only to jobs without social protection, a situation that is worsened by the fact that 39.1% of people living in poverty work as independent workers (or “self-account workers”) (only 21.6% in the case of the non-poor population) (CASEN, 2018). Overall, these are the problems of social inclusion faced by “poor families” in Chile, particularly in regards to labour market inclusion, which determines their inclusion in welfare programmes and, as discussed below, shapes significantly the experiences of participation developed by poor women in these anti-poverty programmes offering “alternative” routes to social inclusion.

3. Women’s Experiences in the “Families Programme”: Individual Projects and Family Wellbeing

The methodology of the “Families Programme” is based on a process of “accompanying” (*acompañamiento*) families in extreme poverty, which includes psychosocial support, labour support and cash transfers. Through this process, it is expected that people will be able to change their living situations by promoting and strengthening ‘families and people’s resources’ so that they can ‘identify projects’ as well as ‘recognize and build alternatives to deal with, and resolve [their] difficulties’ (MIDES, 2016b:12). In the context of the programme, these projects are conceived as “accomplishments” associated with the “wellbeing matrix” used by the programme to assess the wellbeing conditions of the families-beneficiaries as well as to elaborate “the family development plan” that defines what families need to achieve in order to improve their wellbeing conditions. Under the precarious labour conditions in which poor

families find themselves, it is not difficult to understand why the vast majority of the “projects” or “family development plans” carried out by the households-beneficiaries of the “Families Programme” in the district of Valparaíso concentrate on the “wellbeing dimension of work”. Nevertheless, it is important to highlight that, notwithstanding the opportunities offered by the programme to improve the living conditions of poor households through those projects, in practice the development of such opportunities depends heavily on the engagement and work carried out by the female members of these families. This is a ‘pragmatic decision’, as one social worker of the programme told me, because even though the programme is expected to work with the whole family, as encouraged by the professional during the first meetings with the families-beneficiaries, the engagement of men with the programme is affected by a series of issues such as their work schedules, their lack of interest, and overall the taken-for-granted assumption that participation in these welfare programmes is something that women do or must do:

‘... they [men] do not want to participate. Sometimes they are in the first session, showing very good engagement but then they go away, “I cannot miss something”, “I have to work”. So, you get to the next session and ask the woman “where’s your husband?”, she replies “he had to work; he could not attend”. Or they are there [in the house], but they do not come out, sometimes (...) they are in their room, and one says “but tell him to come”, “no, he does not want to”. Then, they deduce from these instances what they have generally always believed, and the man believes, and socially is believed that [these programmes] correspond to women.’

(Social Worker 2, Families Programme)

As a result, the invitation that the programme makes to families to participate seems to be seen as something that concerns only women, as part of the range of female activities and responsibilities expected of poor women. However, beyond the issue of who must or must not participate in welfare programmes, this dimension of responsibility in the sphere of welfare does not stop there. In fact, there is a series of “behaviours” and “duties” that are expected from welfare beneficiaries by the agencies of the state, which is made explicit when the institutions in charge of implementing the programme in the local context make the first contact with beneficiaries to invite them to join the programme, as one of the women interviewed for this research remembers:

‘They arrived at the house just as you arrived, and said “you are on a list, and you are invited to participate in a programme from which you have benefits but where you have to

meet certain requirements, and do things to get the benefits. It's not that we're going to give you this every month without doing anything". No. I had to follow certain rules, and I said: "OK, if I'm going to receive some benefits and I have to do something, good", I said, "I have no problem".'

(Married Woman, 44, beneficiary of the Families Programme for two years)

This encounter is exemplary of the first time that the "Families Programme" establishes contact with the list of beneficiaries selected by the Ministry of Social Development to participate in the programme, which is carried out via home visits to beneficiaries by professionals of the National Fund of Solidarity and Social Investment (FOSIS). Apart from explaining the programme to beneficiaries and asking them to sign a consent letter if they agree to participate, this first meeting also aims to assess the wellbeing conditions of families in order to have an early diagnosis of their living conditions that can help later in the identification of possible projects to be developed with beneficiaries once the intervention process begins. Notwithstanding the formalities, it is possible to notice in the above beneficiary's account how the way in which beneficiaries are informed about the programme is charged with a series of duties and expectations about what it means to participate in the programme, and how beneficiaries are supposed to behave when enrolled. As we can see, there is an element of "conditionality" that includes not only that beneficiaries must commit themselves to receiving the professionals of the programme into their homes with certain regularity as well as to follow the actions established by their family development plans the best they can, but also the expectation of "committed participation" by beneficiaries, which is regarded by professionals as one of the key elements to developing a successful family intervention:

'I always explain the programme in the first sessions, telling people what I expect. I say, "Look, the only thing we can do here, that I can contribute to you, and that you can take advantage of, is the information that I give you, because that information will give you the power to decide (...). Then, we will be able to work as long as you commit yourself to this, and you want to do things for yourself. Because if not, a pity because you leave my hands tied, and I cannot do anything".'

(Social Worker 2, Families Programme)

As seen in the above quote, the issue of commitment is not a minor matter, because even though the programme seeks to improve families' wellbeing conditions through income support and access to other social services and state programmes, almost no benefit is a

priori guaranteed to the beneficiaries of the programme. This represents one of the most critical shortcomings of the system of social protection that the country has tried to build, which concerns the real possibility that each anti-poverty programme may not fulfil the promise of securing a minimal floor of social guarantees to beneficiaries. This is why professionals can only commit themselves to give information to beneficiaries with the hope that this will help people to know what social offers are available in the country, along with the different requirements and procedures associated with the application process. In this uncertain context, then, the motivation and commitment of the women-beneficiaries of the programme constitute a crucial resource to sustain and carry out projects that may or may not lead poor households to improve their living conditions. “Family projects” or “plans”, according to the head of the “Families Programme” in the district of Valparaíso, are regarded as ‘accomplishments’ to which the families selected by the programme must ‘commit’ themselves, being ‘monitored’ by professionals during the two years that the programme works with beneficiaries. Indeed, the whole process of “accompanying” displayed by the programme, and in particular the psychosocial support developed by the personalised methodology of the programme’s social workers, aims at ‘facilitating the development’ of the “family system” through a set of actions oriented to achieve basic wellbeing achievements. Nevertheless, nothing is said about the central role to be played by poor women in both the definition and execution of these wellbeing accomplishments that will hopefully benefit in one dimension or another the development of the whole “family system”. This invisibilisation of women’s contribution to the “Families Programme’s” goals seems to be symptomatic of the fusion that exists in the programme between women’s projects, on the one hand, and the family’s wellbeing plans, on the other. This is evident in the opinion of one woman, who graduated from the programme three years ago:

‘... from the municipality they [professionals] contacted me because of the “Families Programme”, which I found very good. Because more than anything they teach you, in my point of view, how to organise you in the family plan, about the goals that you want to do, what your projects are, if you want to apply for a home, studies or a job.’

(Separated Women, beneficiary graduated from the Families Programme in 2015)

It is interesting to note that this sort of fusion between women’s projects and family projects observed in the “Families Programme” was also identified among women-beneficiaries from the previous “Bridge Programme” of the “Chile Solidario” system. According to a previous study by the ex-Ministry of Social Development of the country (MIDEPLAN) that sought to identify the effects of the psychosocial intervention of the “Bridge Programme” on women, it

was noted that even when at first glance it seemed that women did not have personal projects as they appeared ‘absorbed and invisibilized by the family project’ (MIDEPLAN, 2004:45), a second look revealed that women were, in fact, the central “actors” of such projects, taking into account how the efforts and actions required by these projects were women’s responsibilities (MIDEPLAN, 2004:45). This acknowledgment of “the agency” of poor women in the context of neo-liberal social protection policies seems to indicate the effects of so-called “individualisation of the social” – a process that in the case of Chile and other Latin American countries has involved the transfer of ‘the responsibility of social risks to individuals, and in concrete, to poor women’ (Ceballos, 2015:170), something particularly salient among today’s strategies to relieve poverty in Chile. Beyond these critical concerns, what is important to highlight about the evidence analysed here is the fact that the chances and opportunities to improve the wellbeing conditions of poor households are based, as is the case of the “Families Programme”, on the projects to be developed by women. Projects that even when mostly focused on the wellbeing dimension of work, combine a series of factors that impact on the decisions made by women concerning the kind of concrete projects they can carry out:

‘... my dream and my goal in the programme were to be able to work independently, and train myself (...) because I cannot work with schedules or anything like that because I have two children with disabilities.’

(Married Woman, 26, beneficiary of the Families Programme for 20 months)

‘... when they [professionals] began to tell me what [the programme] was about I liked it because I like to work, but my idea was to work from home because I cannot [work outside the house] with all the grandchildren and children that I have, I could not. Then, it was like a window that opened to me.’

(Grandmother, married, 47, beneficiary of the Families Programme for 16 months)

Hence, the projects of these two women were focused on the possibility of working independently or “from home”, a type of project often found among the beneficiaries of the programme as a response to two different things: on the one hand, the chance to produce an extra source of income to cover households’ needs; and, on the other hand, the very scarce opportunity, in the case of low-income women, to access the sphere of productive work. In the context of this research, these two women were the ones with less labour experience, a situation that was explained, in the case of the younger woman, by the fact that her two young children suffered from genetic disabilities, which led her to focus her labour project on the production of clothes for disabled children. As a result of the programme, this woman was able

to participate in the training and entrepreneurship programmes provided by FOSIS, learning sewing techniques and buying two sewing machines. In the case of the older woman, a grandmother from an extended family with 14 members, she was heavily burdened with the care of her grandchildren, but this domestic work allowed her adult daughters to go out to work. This woman's project was to open a bakery or cake shop in her home, and though still only "an idea" at that stage it was visualised as a family project 'in the future' for when her husband, the head of the household, retires from the building sector and the whole family must depend on the 'very low social pensions' existing in the country. During her married life this woman had only once worked outside the home, in a bar, which she 'didn't like' but had to do 'out of necessity', as well as selling handicrafts around her neighbourhood to have some minimal but regular source of income.

As identified by the professionals working in the programme, 'independent work' and 'entrepreneurship' are widespread activities among the families of the programme, being in fact 'what many beneficiaries seek' when they have the chance to be selected for it. It was observed among the beneficiaries interviewed for this research that, though some of them were working on other wellbeing areas such as education or housing, they also expected to participate in the FOSIS projects in order to develop some entrepreneurship activity. In this sense, the impacts that the "Families Programme" may have on the working conditions and labour income of beneficiaries are strongly associated with the training and micro-entrepreneurship programmes offered by FOSIS to the beneficiaries of the programmes that form part of the "Subsystem of Securities and Opportunities" of the country. This inter-institutional and micro-entrepreneurship strategy can be regarded as an integral part of "the labour-support" provided by the "Families Programme", a strategy evaluated as "positive" by professionals not only because of the real possibilities provided to beneficiaries to get an autonomous income, but also "the empowerment effect" that "winning" a FOSIS programme has on beneficiaries, particularly on women, when they see how their own projects 'begin to concretize', and experience how 'they [women] are able' to make them happen, as illustrated in the one beneficiary's account:

'... thanks to them [the "Families Programme"] I enrolled in CENSE to study. I studied. I received my oven, which is what I wanted because my project was a bakery. After that, I entered the FOSIS, they enrolled me, and I bought my mixer. And it's like I'm going for it.'

(Married Woman, 38, beneficiary of the Families Programme for 16 months)

This is the “successful” case of a Peruvian immigrant with more than 15 years in the country who came to Chile with the hope of studying in a university but had to leave that project behind because of the costs of tuition fees, the need to regularise her situation in the country to be able to stay and work, and because she got married and became the mother of three children. For this woman, the programme was seen as a ‘hope’, after being ‘stopped’ by care responsibilities while her children were not enrolled in primary school and public nurseries, and recently by her diagnosis of cancer. As a result of the programme, she was able to attend a certified training course delivered by CENSE (The National Service of Training and Employment) to learn baking skills, she also received FOSIS funding to buy one professional oven and one kneading machine to open a bakery in her home, and at the time of research she was selling her products around the neighbourhood and nearby schools.

In the light of the above beneficiary’s experience, it can be seen how in the context of the “Families Programme” women’s projects are materialised in a “labour plan” that is then supported and financed by one particular FOSIS programme designed specifically for the beneficiaries of the “Subsystem of Securities and Opportunities”, the so-called “Support to Your Labour Plan” (*Apoyo a Tu Plan Laboral*). According to the Ministry of Social Development, this FOSIS programme constitutes a ‘supplement’ to the socio-labour support developed by the “Families Programme” and the rest of the anti-poverty programmes of the subsystem, which aim at improving the employability of the population living in poverty and vulnerability, a group that is particularly disadvantaged by both their ‘lower educational levels’ and ‘deficient labour capabilities’ (MIDES, 2017b:4–5). In order to achieve such goals, the programme finances a series of services and ‘specific supports’ that can assist in the labour insertion of beneficiaries, such as ‘resources for human capital development’ (training courses), basic health requirements, nursery services and self-employment promotion, among others (MIDES, 2017b:5). Beneficiaries can apply for this funding through their participation into the “Families Programme”, which requires the presentation of an ‘action plan’ to finance services or buy goods, machines or equipment for a maximum amount of US\$544.

At this point, it is relevant to note that even though the above FOSIS programme gives priority support to action plans that promote wage-employment and then to independent work and entrepreneurship (MIDES, 2017b), the empirical evidence suggests the opposite order of priorities. This can be explained, as observed by one of the professionals working in the “Families Programme”, by the fact that wage-employment ‘is not an option’ for many people who would like to do so but cannot because of the problems of combining work schedules with

caring activities – a situation that is particularly salient when there is no family network that can help with children, or when institutional networks such as primary schools and nurseries are not able to offer a place or late opening hours to let mothers participate in outside work. As shown above, one of the most critical issues here – one neglected by the design features of this and other anti-poverty programmes of the Chilean system of social protection – is that when we talk about the difficulties suffered by the “welfare poor” to insert themselves into the formal labour market, we are to a large extent talking about the barriers and lack of opportunities that women, particularly poor women, face in order to do that. This explains why independent work ‘appears’ as a kind of last resort for lower-income women to reconcile income generation and childcare, and to ‘bridge two often conflicting roles: that of provider and that of mother’ (Ehlers and Main, 1998:428), a goal that is clearly in mind when some women think about their projects in the programme:

‘... what I would like to do is make money from my house without leaving my daughter alone all day, in the care of another person, no. For me, it would be ideal to reconcile both things: to care, and generate income from my home.’

(Single Mother, 28, beneficiary of the Families Programme for eight months)

This was the experience of a young single woman, mother of two children (aged 11 and two years old), living in her parent’s house, who expected to take a training course to be a hairdresser or a cook so that she could work from home or sell meals to schools. These are the kinds of labour “options” available to lower-income women who “want” to reconcile care and productive activities or who must do that, as was the case of another woman interviewed for this research who “opted” for working independently from home to take care of their adolescent children, a decision that even though taken by “thinking of the family”, was having a negative impact on the living conditions of the family group:

‘There’s a lot of drugs around this area, too much drug trafficking. I have my daughter who is 14 years old. Unfortunately, one of my neighbour walks away, apparently because of a rape, so I decided to leave my job to begin to work here inside the house. So, I can take care of [my children] school’s schedules, when they come back from school. Then, we [the family] went back because here [home-shop] is not much what I sell. I do not know ... every day I sell between seven and eight lunches, at most 10 lunches, but it’s like what I have for day to day, and I have to do it anyway...’

(Re-married Woman, 42, beneficiary of the Families Programme for 12 months)

This was the case of a middle-aged woman, mother of four children, including two teenagers (aged 14 and 12 years old), who sold meals in her house for the past year after being impacted by a massive fire that affected several families in the district, which led FOSIS to assign emergency funding to help people replace household equipment and also to support alternative productive activities. In this context, this woman was able to buy a fryer-machine to sell lunches and other meals from her home, leaving her outside work as a secretary. This decision, apart from these circumstances, was profoundly influenced by the need to take care of, or to better “protect”, her adolescent children from the risks of their immediate social environment (drugs and crime). This perception of risk was also based on the recent experience of her adult daughters who began to consume drugs and decided to leave the house the previous year. Overall, this decision to work independently from home ‘thinking of the family’, as this woman told me, had in economic terms involved ‘moving backwards’, considering the few meals that she could sell in her neighbourhood, a source of income that only lasted ‘for the day’. Clearly, if she did not feel so compelled to protect her children, she would be ‘working outside the home, with a wage and social insurance’, as she commented me. This is why, as a result of her participation in the “Families Programme”, and after her experience of self-employment, this woman decided to take a certified training course on food handling, which she expects will widen her scope of alternatives of labour insertion, being able in the future to work in schools or kindergartens.

As shown above, education and training was another strategy deployed by the “Families Programme” to widen the “life chances” of beneficiaries, particularly by improving human capital and labour capabilities that could allow poor women not only to carry out their entrepreneurship projects but also to enrol in wage-employment. Such education and training is needed, as one of the professionals working in the programme told me, because many of the women-beneficiaries, particularly those who are younger, have not finished secondary school, which disadvantages them in their attempts to join the labour market. In the context of Chile, low education levels have a high incidence (24.1%) among households suffering from multidimensional poverty (CASEN, 2018); this was also a common situation among the group of 12 women interviewed for this research, where only five had completed their secondary education. This is why in the context of the “Families Programme”, women are given support to finish their studies, as was the case of the following young woman who, even though she had the chance to work outside the home some years ago, had to leave the job as she was dismissed due to her incomplete secondary education:

'... she [the social worker] asked me what I would like to do. I told her finishing my studies would be the most important thing. I was working taking care of older people but they dismissed me because I had not finished my studies.'

(Married Woman, 29, beneficiary of the Families Programme for 16 months)

This is the case of a young woman, mother of four children, who had worked in a nursing home as a cleaner but while there was able to learn 'from practice' how to take care of older people, something that she would like to do again after completing her secondary education, although she would like to apply to the FOSIS entrepreneurship programme as well. Job opportunities outside the home for poor women in Chile are quite limited, particularly for those with low education levels. It is also hard to sustain when domestic and care activities continue to be seen as women's responsibilities, another reason why self-employment appears as a better option, particularly in terms of workload. This was the case of the following woman-beneficiary of the "Families Programme" who works cleaning offices four nights a week, but would like to work again from home selling fruits and vegetables as she did after participating in a FOSIS entrepreneurship programme while she was a beneficiary of the "Bridge Programme" in 2004. For her this would be better, considering the level of stress produced by having to work permanently "in" and "outside" home:

Beneficiary: '... we [she and the social worker] are planning to see if I can recover the business I had before, which was to sell vegetables and fruits, those things.'

Interviewer: '(...) and why would you like to recover the business you had?'

Beneficiary: 'First, because I work during the night (...) until 08:30 hrs. And (...) when my children are here one cannot rest. And my work is from Saturday night to Wednesday night, working every night in a row without rest. [And] at home you cannot rest either.'

(Married Woman, 48, beneficiary of the Families Programme for 16 months)

This was the case of a middle-aged woman who, in the context of her participation in the "Families Programme", had decided to give priority to the improvement of her house, something that for this woman represented a longstanding goal, which in 2006 led her to migrate to Spain to work for three years in order to save money and buy a new home once she returned to Chile. This was a project motivated mostly by her desire 'to give a good life' to her four little children but that did not work because when she returned she had to spend all her savings on repairing her previous house from the damages produced by a series of robberies that occurred while the family was away. This new precarious situation led her to work outside the home to continue fixing their house, something that progressed significantly

once her family was selected as a beneficiary of the “Families Programme” in 2015. In fact, in the context of the anti-poverty programmes that form part of the “Subsystem of Securities and Opportunities”, there was one particular social programme focused on the improvement of the housing conditions of the families-beneficiaries of the subsystem, which was the so-called “Housing Programme” (*Programa Habitabilidad*) (MIDES, 2016e). This was how in the context of the “Families Programme”, this woman was able to apply to this “Housing Programme” executed by the city council of Valparaíso, which, through a series of housing improvements, helped this woman to feel that she ‘has now achieved to be as she was’ during her time in Spain. This re-materialisation of her family project was only completed when she could return to working independently from home, and had applied to the FOSIS entrepreneurship programmes as part of the socio-labour support provided by the “Families Programme”. Self-employment would allow this woman to reduce her amount of work in and outside the home, and also, as she told me, ‘to take care’ of her son ‘properly’ now that he is a teenager.

4. Seeking Inclusion through Informal Work – Again?

Based on the experiences of the group of women-beneficiaries interviewed for this research and the high concentration of projects concerning self-employment and entrepreneurship activities, it is clear that the most critical wellbeing dimension among households living in poverty was that of “work and income generation”. This is in line with the characterisation of the welfare beneficiaries and their living conditions developed at the beginning of this chapter, which identified the precarious conditions of labour integration prevailing among the members of the households selected by the “Families Programme” in the district of Valparaíso. Taking this into account, and given the features of the “socio-labour component” developed by the “Families Programme”, particularly through the access to FOSIS’s entrepreneurship projects, it can be concluded that the participation of welfare beneficiaries in the “Families Programme” resulted in the institutionalisation of the households’ weak and precarious labour integration, rather than significantly altering or improving it. In this sense, the strategy of social inclusion of “the poor” envisioned by the “Subsystem of Securities and Opportunities” was characterised, in this specific programme, by its reproductive character and low distributive impact, as it worked to reproduce and institutionalise beneficiaries’ vulnerable socio-economic conditions through access to informal sources of work and income.

At this point, however, it is relevant to consider how the anti-poverty strategy of the country with its different anti-poverty programmes, including the components of “cash transfers”, “psychosocial support” and, most importantly, “socio-labour support”, has been developed to improve the weakest aspects of the previous “Chile Solidario” system, particularly in matters of work and income generation (Larrañaga et al., 2014; Vargas, 2014). In fact, by 2009 the ex-Ministry of Social Development (MIDEPLAN) found that 83.3% of the households graduated from “Chile Solidario” were working under insecure labour conditions, and receiving meagre wages (MIDEPLAN, 2009; in Vargas, 2011:32). To a large extent, such precarious labour integration was determined by the high incidence of self-employment among the groups of families having graduated from “Chile Solidario”, which in most of the cases constituted only survival activities (MIDEPLAN, 2009; in Vargas, 2011:32). Similar results were found in regards to FOSIS and its offer of micro-entrepreneurship projects among the families that were beneficiaries of “Chile Solidario”. In these cases, the low economic return of these micro-entrepreneurship projects, which made them secondary labour activities, represented mainly survival activities for those families living in poverty (MIDEPLAN, 2009; in Vargas, 2011:32).

In the light of the above evidence, and considering the experiences of the group of women-beneficiaries interviewed in this chapter, it could be asked: what really changed with the replacement of “Chile Solidario” by the anti-poverty strategy followed by the “Subsystem of Securities and Opportunities” with its different anti-poverty programmes, among them the “Families Programme”? This is an important question, especially considering that among the different wellbeing dimensions identified by “Chile Solidario”, the dimension “work and income” involved offering to beneficiaries access to social programmes that could help households’ unemployed members to join the labour market either as dependent or independent (self-employed) workers, and also included preferential access to two FOSIS programmes (the “Programme of Labour Re-insertion and Employment”, and the “Programme of Support to Economic Activities”) (MIDEPLAN, 2004b:31). As seen in the case of the “Families Programme” of the “Subsystem of Securities and Opportunities”, the “socio-labour component” of the programme concentrates mostly on access to one particular entrepreneurship programme offered by FOSIS – the so-called “Support to Your Labour Plan”. In this sense, there is a high level of continuity between the labour strategy developed by “Chile Solidario” and the strategy followed by the “Subsystem of Securities and Opportunities”, mainly through the development of alternative ways of labour inclusion based on independent work and self-employment. This continuity is not only in the kind of socio-labour strategy followed by both “Chile Solidario” and the “Subsystem of Securities and Opportunities”, but more importantly,

there is also a high continuity regarding the results produced by this strategy as indicated by the official evidence on the current impact of anti-poverty programmes in matters of labour inclusion and income generation among welfare beneficiaries.

In fact, notwithstanding that there is little information about the results produced by the current socio-labour component of the anti-poverty programmes of the “Subsystem of Securities and Opportunities”, there is some evidence that indicates the limited impact this component has had on matters of labour inclusion and income generation among welfare beneficiaries. In this regard, the first results were provided by the impact evaluation of the “Families Programme” commanded by the Sub-Secretary of Social Services of the Ministry of Social Development (2016). This evaluation found that among the 66,654 people that participated in the programme and in its component of “labour support”, 24.3% (16,179 individuals) had records of unemployment insurance contributions during the period 2013–2016, which could indicate that a small group of the beneficiaries who graduated from the “Families Programme” were or have been working as dependent wage workers in the private sector during the period of study, though more information was needed to ratify this (Navarro et al., 2016:24). Additionally, there was a second impact assessment commissioned by the Budget Agency of the Ministry of Treasury to the University of Chile (2016) with the aim of evaluating the impacts of the employment programmes provided by FOSIS. The study evaluated three FOSIS programmes, among them the “Support to Your Labour Plan”, which is included in the “labour support” component of the anti-poverty programmes of the “Subsystem of Securities and Opportunities”. In this case, the results showed that of the three FOSIS programmes, only one had positive and significant effects on beneficiaries’ market labour insertion. In the case of the programme “Support to Your Labour Plan”, the impact assessment found that it did not achieve greater labour insertion nor major levels of autonomous income generation among beneficiaries, even 18 months after their graduation from the programme (Universidad de Chile, 2016:81). Perhaps the best evidence regarding the scarce results produced by the socio-labour component included in the anti-poverty programmes was provided by the professionals interviewed for this research as they were directly involved in the implementation of the strategy of social inclusion envisioned by the “Subsystem of Securities and Opportunities” at the local level:

‘I wonder if the answer of the Subsystem [of Securities and Opportunities] to improve employability or the economic autonomy of families is that all families apply to FOSIS projects. For me, then, it would be interesting to know if there is any study of FOSIS that talks about the results of its policies. (...) For example, here in Valparaíso, there may well

have been (...) 1,500 people in the last three years who have received \$350,000 [US\$530] to be able to finance their entrepreneurship [projects]. Then, what is the state of these entrepreneurship [projects] today? [Considering that these are] families that if they buy a gas canister to use the oven but then have some economic problem, [end up] selling the gas canister and selling the oven.'

(Social Worker, Opening Roads Programme)

'[We need to] improve the conditions of employability of women, of formal work. Enough of the ovens. Enough of replicating the domestic role. [Enough of women] selling empanadas [traditional Chilean meal], hand-made bread or sport-clothes that they made. Enough of the oven and the sewing machine (...) Let's go further than if a woman has problems the first thing she does is sell the oven.'

(Social Worker, Head of the Department of Development and Social Promotion,
Municipality of Valparaíso)

'... In these entrepreneurship programmes, people are trained for fifteen sessions and then they receive an oven. People use it for a while and then end up selling the oven.'

(Social Worker, Habitability Programme)

As seen in the above quotes, there was a shared perception among the professionals working in the social protection system of the country at the local level about the lack of sustainability of the anti-poverty strategy, mainly through the offering of FOSIS's entrepreneurship projects. As we can see, the typical image associated with the entrepreneurship projects developed by welfare beneficiaries was "the oven", one of the resources that many of the people selected by FOSIS could obtain, which constituted the capital that would let them carry out their independent work projects – capital that "after a while" was often "sold" as was also the case of the "gas canisters" needed to make the oven work, a situation that frequently occurred when people found themselves under economic pressure or need. To some extent, these were the negative outcomes of the socio-labour component included in the anti-poverty programmes of the "Subsystem of Securities and Opportunities", which nevertheless were of most interest to beneficiaries, particularly poor women. In fact, as illustrated by the above professionals' experiences and as identified throughout the analysis of the experiences of beneficiaries from the "Families Programme", entrepreneurship projects were mostly associated with and developed by women. Women were the ones encouraged to engage with this type of alternative socio-labour strategy, which nevertheless was characterised by its almost survival character, precarious labour conditions and, more problematically, its lack of sustainability over time.

5. Informality, Gender and Misrecognition

As identified above, one of the central goals behind the “Families Programme” is that beneficiaries could “sustainably overcome poverty”, particularly through the component of socio-labour support and its contribution to “labour inclusion” and “autonomous income generation”. Nevertheless, the empirical evidence clearly indicates the lack of sustainability of this strategy as well as the poor-quality standards associated with it, as the alternatives of labour inclusion offered to “the poor” in Chile are characterised by a lack of social protection, very low incomes and few prospects of development. Of course, there are several factors behind this. On the one hand, the professionals working in FOSIS who were interviewed for this research were very critical about the work developed by the professionals that carry out the component of socio-labour support in the anti-poverty programmes that form part of the “Subsystem of Securities and Opportunities”. From this perspective, they criticised the poor orientation given to beneficiaries as professionals do not know the social offer in place in each district nor the productive activities that are typical in each local context, all of which would help to decide which entrepreneurship projects would be more pertinent and sustainable in each specific context. On the other hand, the critiques raised by the professionals implementing the component of socio-labour support, in the case of the “Families Programme”, included concerns about the lack of long-term supervision and accompanying provided by FOSIS to beneficiaries in order to help them in matters of business management and finance. If these critical issues as raised by the professionals involved in the implementation of the anti-poverty strategy designed by the “Subsystem of Securities and Opportunities” were properly considered, it would ensure perhaps that the component of socio-labour support could achieve better results in matters of labour inclusion and income generation among welfare beneficiaries.

Nevertheless, in addition to the shortcomings of design and implementation that to some extent explain the lack of sustainability and impact of entrepreneurship projects to promote labour inclusion among “the poor”, we need to also consider the critical issue of the interests and motivations showed by welfare beneficiaries in regard to the opportunities that anti-poverty programmes offer them to develop self-employment and independent work. As identified through the analysis of the experiences of women-beneficiaries participating in the “Families Programme” and as pointed out by the professionals implementing the component of socio-labour support, what many beneficiaries expect when selected in the programme is access to the FOSIS entrepreneurship programs in order to obtain alternative forms of self-

employment or independent work. These expectations and interests go beyond the specific case of the “Families Programme” and seem to be a wider trend among welfare beneficiaries. This constitutes a critical issue when approaching the labour inclusion of “the poor”, as observed by the professionals interviewed for this research:

‘[In the FOSIS programmes] there can be two outcomes. One is dependent [work], while the other is entrepreneurship, independent work. (...) There are many [beneficiaries] who opt for entrepreneurship, which is the most difficult for us to make work. In this sense, what we propose [to them] is that they begin as dependent workers or that they opt for financing to take training courses. It is a constant struggle that we have with the subsystem of securities and opportunities, because in addition (...) there are young people who have a lot of children. Then, considering that reality, the number of children and that they opt mostly for independent work, what happens in the end is that often what is being encouraged are precarious jobs which is like the vacuum that we have.’

(Social Worker, supervisor of the programme “Support to Your Labour Plan”, FOSIS, region of Valparaíso)

‘The other thing we have seen a lot, and that is the most complicated thing, is that the real possibilities of work that are available today for families do not meet their expectations. Therefore, when one points to training courses and opportunities for internships, people are not available to work in dependent jobs. As those jobs are poorly paid, people weigh the pluses and minuses of what it means to go to work [in dependent jobs] versus these other more informal, independent jobs, and [decide] against dependent work.’

(Anthropologist, Head of the Social Unit of the Sub-Secretary of the Ministry of Social Development (SUBDERE), region of Valparaíso)

These quotes show the limits of welfare to significantly alter the structural factors behind the current dynamics of the labour market that shape the conditions and possibilities of labour inclusion among “the poor” as well as the choices and expectations of welfare beneficiaries. As identified above, one of the most salient features of the welfare beneficiaries interviewed for this research was their precarious and informal labour situation. This goes beyond the specific case of Chile or welfare beneficiaries – this has become a major trend in the region due to the growth of the informal economy over the past few decades, resulting in high levels of unprotected, insecure and poorly paid jobs (Valenzuela, 2005). Although several factors account for such a growth (i.e. growth in the labour supply, contraction of the public sector, decreases in private sector jobs, among others), nevertheless the lack of formal jobs has led men and women to resort to self-employment, at the same time that new jobs have been

created in the microbusiness or microenterprise sector (Valenzuela, 2005:5). In fact, based on International Labour Organization (ILO) records, while the informal economy accounted for 46.7% of urban employment creation in Latin America in 2003 (3.9% more than 1990), 39.7% of those urban jobs were created by microbusiness and self-employment (2.8% more than 1990) (Valenzuela, 2005:5). As in the rest of the region, the informal economy is a salient feature of the labour market in Chile, although between 1990 and 2006 the labour informality rate of the country decreased from 41.2% to 39.5% (Infante, 2011:48). In this sense, while informality is less salient in Chile compared to the rest of the countries of the region (Infante, 2011; Valenzuela, 2005), it is still high compared to OECD standards as it shows ‘an excessive dependency on self-employment and temporal jobs’, along with a ‘high proportion of workers employed under precarious labour conditions’ (OECD, 2018:38). In fact, the proportion of both waged and self-employed workers without social security contributions among the total number of workers in Chile corresponded to 32% in 2015, a percentage that has remained stable since the mid-2000s, being more salient among low-skilled workers, women and young people, among other categories of the population (OECD, 2018:38). As noted above, this is more prominent among the poor population as the percentage of self-employed workers among this group in 2017 was 39.1%, while in the case of non-poor groups it amounted to 21.6% (CASEN, 2018).

The above trends of informalisation and precarious labour insertion observed among the countries of the region and specifically in Chile can be regarded as the structural conditions that shape the form as well as the limits of the strategy of social inclusion pursued by anti-poverty programmes developed under the “Subsystem of Securities and Opportunities”. These structural labour conditions define the precarious and limited opportunities for labour integration of lower income groups in the country, which is one of the main factors behind the situation of poverty in which welfare beneficiaries find themselves. In the light of the relational approach of poverty followed in this research, we must identify the particular conditions of social integration of those occupying the lower social positions in Chilean society. Following this relational approach, it is necessary to highlight the fact that objective conditions do not only exist in “the things out there” (e.g. in the labour market) but also “in the body” since people’s circumstances or social positions are constitutive of subjective dispositions or habitus (Gutierrez, 2002). “Habitus” or ‘the mental structures through which [individuals] apprehend the social world’ can be regarded as part of the process by which people adjust to their social positions, as subjective dispositions constitute ‘the product of the internalisation of the structures of that world’ (Bourdieu, 1989:18). As such, it is important to consider how

subjective dispositions are not only the product of social positions determined by class but also by other types of social divisions such as gender, which, as they are 'lived as profoundly felt set of dispositions and behaviour' (McNay, 2008:279), shape significantly people's choices or 'what seems reasonable and possible' (Bowman, 2010:11).

Under the relational approach of poverty described above, it is possible to understand why welfare beneficiaries in Chile are showing a high interest and motivation for self-employment and entrepreneurship activities as observed by some of the professionals interviewed for this research, and corroborated by the experiences of the group of women-beneficiaries of the "Families Programme" who took part in this study. Overall, for those occupying subjugated social positions in Chilean society as is the case of welfare beneficiaries, self-employment and entrepreneurship activities are possibly perceived as one of the few options available to them for labour inclusion or productive development. And because such options are few and perhaps challenging to achieve, it makes sense that, apart from beneficiaries' high interest and motivations for informal work opportunities, there was also a high level of satisfaction among the women-beneficiaries interviewed for this research with respect to the "tools" and "opportunities" given by the "Families Programme", which included their participation in the FOSIS entrepreneurship projects:

'From my experience, I feel that the best thing about the programme is that I have been able to train, that I have been able to take courses, and that I now have a tool in my hands to be able to defend my family in case of anything, economically speaking, which I did not have before.'

(Married Woman, 26, beneficiary of the Families Programme for 20 months)

'Look, I find it super good [the programme], because there are people who do not have the tools to work because they stay at home or like me, who opted to have children.'

(Married Woman, 44, beneficiary of the Families Programme for two years)

'... you are being given the opportunity to learn something, so that later on, I do not know, you can be on your own...'

(Single Mother, 28, beneficiary of the Families Programme for eight months)

However, it is at this point that we can clearly identify how these feelings of satisfaction or "positive dispositions" towards what beneficiaries experienced and received when participating in the "Families Programme" were shaped not only by beneficiaries' class positions but also, and significantly, by their gender status. This is the aspect that perhaps

remains invisible under an anti-poverty programme whose target group is officially defined as “poor households” or “poor families” but where most of the participants are poor women. This “invisibilisation” is not only present in this specific programme but also, and critically, in most of the programmes provided by FOSIS, which is the key component of the strategy of social inclusion of the poor envisioned by the “Subsystem of Securities and Opportunities” and implemented through the component of socio-labour support. In fact, as demonstrated in this chapter, most of the professionals’ references to the outcomes of entrepreneurship projects among welfare beneficiaries pointed to the experiences of poor women. This is understandable considering that among the 3,906 beneficiaries included in the users’ satisfaction survey commanded by FOSIS in 2015, 86.9% of participants were women (Clio-Dinamica Consulting, 2015). The survey included the evaluation of eight social programmes offered by FOSIS, and found a rate of users’ satisfaction of 94%, which in the case of the “Support to Your Labour Plan” programme, which was also included among the programmes to be evaluated by the survey, was 95% (Clio-Dinamica Consulting, 2015). This data provides strong evidence of both the significant presence of women among welfare beneficiaries, and on the other hand, about the high interest of poor women in FOSIS entrepreneurship programmes.

At this point, it seems relevant to note how the relation between anti-poverty programmes, entrepreneurship and women identified in Chile has to be seen in the light of the “human-face” safety-nets’ that were established in several developing countries during the 1990s in which micro-entrepreneurship was regarded as a good strategy, not only to relieve poverty by increasing the resources of “the poor”, but also to contribute to economic growth due to the potential dynamism of the previously neglected small-scale economic sector (Mayoux, 1995:6). Interestingly, during the 1990s this strategy was specially targeted at women (Mayoux, 1995) as part of the international development agendas promoting “investment in women” guided by “productivist” and efficiency neo-liberal arguments as well as by instrumentalist gender approaches that saw women’s economic development as a valuable asset to overcoming poverty (Staab, 2010:618–619). In the case of Chile, this social investment agenda materialised in the creation of the “Fund of Solidarity and Social Investment” (FOSIS) in 1990, which became the key social institution for “leading the strategies to overcome poverty and vulnerability” in the country through the constitution of a wide programmatic offer in which entrepreneurship projects occupied a central place. Interesting to observe in the Chilean case is the fact that even though this strategy of social investment through FOSIS entrepreneurship programmes was not specially targeted at women, it nevertheless ‘captured’ the attention of

'female welfare beneficiaries' from both the previous "Chile Solidario" system (CEPAL/OEA/OIT, 2011:56), as well as from the "Subsystem of Securities and Opportunities", as corroborated by this research.

In the light of the high interest shown by poor women in the opportunities of self-employment and independent work provided by anti-poverty programmes in the country, it is relevant to consider here how the micro-entrepreneurship's investment strategy for women's development was in part justified by the degree to which the labour opportunities brought by this strategy would come to satisfy women's expressed employment needs and preferences (Mayoux, 1995). This pointed to the already high presence of women in the small-scale sector by the 1990s, a trend that seemed to be explained by the "benefits" provided by this labour sector to women, such as its 'flexibility and location in or near women's homes', among others factors (Otero, 1987; in Mayoux, 1995:1995). These "perceived advantages" seemed to be behind the high levels of interest shown by poor women in the FOSIS-entrepreneurship programmes if we consider the experiences of the group of women-beneficiaries from the "Families Programme" interviewed for this research, who in several cases "opted" for self-employment as a way to reconcile productive work and care. However, this was not seen as the only "advantage" of self-employment and entrepreneurship for poor women. As identified by the evaluation of MIDEPLAN (2008) about the labour incorporation of women-beneficiaries from the "Chile Solidario" system, poor women's preferences for self-employment were also explained by the perception of this economic sector as one that was easier to enter, was less threatening and was more controllable for people that did not have the skills and training required by the formal labour market (MIDEPLAN, 2008).

As rightly argued by Mayoux, the growing participation of women in micro-entrepreneurship projects as well as the high interest in these productive activities among poor women 'must be seen in the context of wider economic trends and the alternative economic options (or perceived options) open to women' (Mayoux, 1995:25). In this sense, as identified by the evaluation of the impacts of CCTs programmes on employment generation developed by CEPAL/OEA/OIT in the region, which included the previous "Chile Solidario" system, the development of both micro-entrepreneurship activities and self-employment trajectories among households living in poverty and extreme poverty in the region 'are closely tied with the exclusion from the access to both the market and productive resources' (CEPAL/OEA/OIT, 2011:56). In fact, as already documented in this chapter, informality and precarious labour inclusion is a salient condition among poor households in Chile, which must be seen in the

light of the growth of the informal economy in the whole region during the last decades. Even though this growth has provided new working opportunities for “the poor” and other social categories such as women and young people, it is characterised by conditions of precarious and unprotected conditions of labour inclusion. Notwithstanding this general situation, it is important to highlight the ‘gender gap’ existing inside the informal economy, which in the case of Latin America is related to the fact that a large number of women are concentrated in ‘lower quality jobs, and as self-employed workers’, while ‘men dominate the microbusiness’ subsector that provides better quality jobs (Valenzuela, 2005:7). Additionally, the income gap by gender is higher in the informal economy, which can be explained, among other things, by women’s lower average income in this economic sector (Valenzuela, 2005:22). This income inequality in the case of the informal economy is related to the small scale of women’s business activities (often working as street sellers or home-based workers), as well as to their insertion into saturated and undervalued markets where women’s productive activities constitute extensions of their gender’s socialisation and reproductive work (Valenzuela, 2005). Adding to the pressure of trying to balance family responsibilities and productive activities, it is understandable why women in the informal economy end up developing productive activities that remain ‘at a survival level’, providing services or goods to others ‘as poor as they are within the same neighbourhood’ (Valenzuela, 2005:19).

Even though poor women or welfare beneficiaries perceive the informal economy and entrepreneurship activities as “easy to enter”, and in that sense more suitable to their life conditions determined by their class positions and gender status, such accommodation does not mean major advancements for poor women in the long term. As such, based on the above evidence, the economic prospects of women’s self-employment and entrepreneurship are very limited as the major contribution of these productive activities seems to be to survival and everyday family reproduction. Although poor women “prefer” independent work because of the “advantages” it provides to balance productive activities and care, it was found that women’s gender status associated to families’ reproduction was not significantly altered. This is critical in a country with one of the lowest rates of female labour participation in Latin America (Vargas, 2014; Cecchini et al., 2012; Encina, 2008), which in 2017 amounted to 48.9% (against 71.6% in the case of men), and that among the last income decile corresponded to 26.7% (against 72.1% among women from the highest income decile) (CASEN, 2018). As the construction of the needs of “the poor” by the “Families Programme” concentrates on “family wellbeing”, the gender-specific disadvantages suffered by poor women to access the labour market in either the formal or informal economy remain invisible.

It is at this point that we have to consider the injustices of recognition suffered by poor women in the welfare field, which are produced by 'institutionalized patterns of cultural value which constitute some actors as inferior, excluded, wholly other, or simply invisible' (Fraser, 2001:24). From this perspective, the invisibilisation of poor women's needs and circumstances constitute a form of misrecognition, which in most of the cases can be explained by how means-tested or anti-poverty programmes construct women's needs. Typically, welfare programmes' approach towards poor women is one that sees women as 'familiarized subjects' or as subjects 'attached to a family', generally a 'deficient' one (Fraser, 1987:109) like "poor families". Following this view, the "Families Programme" constitutes an illustrative example of this treatment towards women considering how even though the major presence, engagement and participation is that of poor women in this anti-poverty programme, their particular needs and circumstances remain hidden and invisible under the priority given to family wellbeing. Perhaps, the critical issue behind this dynamic of misrecognition suffered by poor women in the welfare field, as pointed out by Nussbaum (2000), is that in most of the cases women's wellbeing is not treated as an end in itself, or as something that requires the recognition of women 'as persons with dignity that deserve respect from laws and social institutions' (Nussbaum, 2000:200). Social recognition involves respect since what is at stake when we consider the impact of injustices of misrecognition are precisely their effects on 'the relative standing of social actors' (Fraser, 2001:24). Following Fraser, anti-poverty programmes can contribute to 'equality of respect' and to major levels of 'gender equity' only if programmes do not 'trivialize women's activities', and do not 'ignore women's contributions' (Fraser, 1994:599).

Considering the above elements, to what extent do the anti-poverty programmes of the "Subsystem of Securities and Opportunities" guarantee poor women's equality of respect considering the priority given to family wellbeing over individual wellbeing, and the ways in which it makes women's particular circumstances and needs invisible? Further, to what extent is the intensive participation of poor women in the anti-poverty programmes of the country taken seriously or is it only approached as the "channel" or the most efficient way to distribute resources to "the poor"? Overall, to what extent are women's contributions really valued or are they simply trivialised? These are critical questions that in the light of the experiences of the group of women interviewed for this research are highly relevant, considering, on the one hand, the positive dispositions and high levels of satisfaction expressed by poor women towards their entrepreneurship projects and, on the other hand, the existing evidence about the lack of sustainability and the survival character of these informal activities. This lack of sustainability, as pointed by the professionals interviewed for this research, materialised in the fact that

welfare beneficiaries ended up selling the resources granted by FOSIS to carry out their entrepreneurship projects in order to survive. However, what is necessary to highlight here is the fact that such “failed projects” constitute the projects and productive attempts developed by poor women, who are the ones taking all the risks and burdens associated with self-employment, as well as the subjects that are being seen and identified with the failure or “triviality” of this type of anti-poverty strategy developed in Chile. This negative social exposition in which this type of social policy leaves welfare beneficiaries, and in particular poor women, ends up functioning as a factor of social differentiation among the poor, particularly among those participating in these social programmes encouraging entrepreneurship:

[Talking about her mum’s experience in the previous “Chile Solidario” system] I think she never took seriously what the programme was (...), like that people who participate in FOSIS later sell their things, like when they buy an oven and then sell it.’

(Married Woman, 26, beneficiary of the Families Programme for 20 months)

‘... sometimes there are people who misuse them [benefits obtained from FOSIS entrepreneurship projects] (...) I know a case where I live. The girl had her business, she had it set it up well, with all the supplies but it did not work, and she sold everything.’

(Woman, cohabiting, 41, beneficiary of the Families Programme for 16 months)

‘There are people who are given facilities but that do not progress because they do not want to. Some time ago I had some neighbours (...), they were given a sewing machine, and then, they were selling it. I tell you, some people do not know the value of things.’

(Separated Woman, 42, graduated from the Families Programme in 2015)

As can be identified in the above beneficiaries’ accounts, for those occupying the dominated positions in social space, the lack of success in entrepreneurship projects developed by others close to their precarious social positions is mainly seen as an issue of individual failure and personal responsibility – in short, an issue of welfare beneficiaries’ lack of deservedness. While this is analysed in much detail in subsequent empirical chapters, what is relevant to highlight here is how the above beneficiaries’ accounts express the negative connotations and prejudices associated with those situations in which entrepreneurship projects fail, and people end up “selling their things” – that is, the capital acquired through their participation in the FOSIS entrepreneurship programmes. Indeed, such action seems to constitute the proof of beneficiaries’ lack of deservedness as it provides evidence about welfare beneficiaries’ lack of seriousness, their misuse of resources, or simply their incapacity to “know the value of things”. To some extent, it is possible to see here again the dynamics of misrecognition

happening in the welfare field, although this time from a different perspective. As identified by Bourdieu, misrecognition refers ‘to an alienated cognition that looks at the world through the categories the world imposes and apprehends the social world as a natural world’ (Bourdieu, 1990:140–141; in McNay, 2008:278). What seems to be behind the individualising and responsabilising explanations given by beneficiaries about other’s people failure in matters of entrepreneurship is a process of naturalisation through which the structural factors associated with the few options and supports existing in Chile to guarantee more secure and stable opportunities of labour inclusion for “the poor” remain hidden. Due to the fact that such structural factors are difficult to apprehend for people located at the bottom of the social space, what acquires more visibility and relevance for them are personal and individual features or people’s dispositions to take seriously the opportunities given by welfare programmes, valuing the resources received and avoiding their misuse. This individualistic view that has perhaps, under the neo-liberal orientation, influenced current social policy development, constitutes no other than ‘the hegemonic view of the world’ (McNay, 2008:279) that “the poor” end up internalising, and that helps to lead them to misrecognise their own conditions of disadvantage.

The above displays part of the dynamics of misrecognition or symbolic violence to which welfare beneficiaries are exposed when participating in the anti-poverty of the country, which in turn seems to help strengthen one of the key criteria of social differentiation among welfare beneficiaries – namely, the distinction between “the poor” and the “deserving poor”. Nevertheless, such dynamics of misrecognition and differentiation have strong gender implications considering that poor women constitute the welfare beneficiary *per excellence* in Chile, as widely demonstrated in this chapter. These gender implications, among other things, add pressure to poor women, who apart from being judged in terms of their “performance” in entrepreneurship programmes are always judged in accordance to their performance as “good” and “sacrificial” mothers (Molyneux, 2007), particularly in relation to the use of cash transfers:

‘[Commenting on the case of their female neighbours] ... what bothers me is that they buy things like the best pants, the best shoes. I say [to them]: “You have children, buy things for your children.” I spend the bonus [monetary transfers from the programme] on my children or at home. And you see how I am dressed; I do not give myself luxuries.’

(Married Woman, 47, beneficiary of the Families Programme for 16 months)

‘... imagine, there are women who have five, six children, and if you think about the March bonus [monetary transfer], it’s quite a good amount of money. With that, you can do

something (...) [like] fixing the house, buying a microwave (...). Some people sometimes get those bonuses and go buy shoes.'

(Separated Woman, 42, graduated from the Families Programme in 2015)

Conclusion

The purpose of this chapter was to analyse the strategy of inclusion of “the poor” in Chile through the experiences of a group of female welfare beneficiaries participating in one of the anti-poverty programmes of the “Subsystem of Securities and Opportunities” chosen as a case study for this research – namely, the “Families Programme”. In this regard, it was possible to identify a high level of continuity between the current anti-poverty strategy of the country implemented through the programmes that form part of the “Subsystem of Securities and Opportunities”, with the previous strategy implemented by “Chile Solidario”. Part of this continuity relates to the labour strategy pursued by the subsystem, which concentrates on self-employment and independent work, as well as by the poor results of this strategy in terms of labour inclusion. In this sense, rather than enhancing the social positions of the poor in the labour market, it was found that current entrepreneurship policies are helping to institutionalise the precarious and insecure labour inclusion of welfare beneficiaries. Consequently, only a minimal redistributive impact of the current anti-poverty strategy was observed in terms of securing sustainable chances to overcome poverty by welfare beneficiaries, which suggests there is not much prospect of social mobility for this section of the population.

However, apart from distribution, it was also possible to identify a series of dynamics of misrecognition occurring in the welfare field, which were particularly detrimental to poor women who constitute the majority of welfare beneficiaries in Chile. In fact, the lack of sustainability and often the failure of entrepreneurship activities carried out by welfare beneficiaries constituted situations that in most of the cases affected women, exposing them to public scrutiny and judgement. As the current strategy of labour inclusion neglects the structural factors behind women’s high concentration and interest in the informal sector, the lack of success of these policies ends up being explained by individual factors such as beneficiaries’ deservedness and responsibility. Overall, in the context of the anti-poverty programme analysed here, it seems that the priority given to family’s wellbeing over individual wellbeing serves to trivialise women’s productive activities, which in essence constitutes a form of misrecognition of women’s social contributions. This misrecognition in the context of the welfare field in Chile involves a disregarding of the different realms in which poor women are actively engaged, such as their high participation in anti-poverty programmes, their

constant contribution to the family's reproduction and wellbeing through their work in and outside the home, and as independent workers performing under very precarious labour conditions. All these activities deserve proper social recognition and adequate material support from the welfare field.

CHAPTER V

The Welfare Inclusion of “the Old”: A Case of Social Recognition?

Introduction

This chapter aims to analyse the second anti-poverty programme of the “Subsystem of Securities and Opportunities” chosen for this research – the “Programa Vinculos” (“Bonds Programme”). Along similar lines to the analysis developed in the case of the “Families Programme”, the chapter concentrates on the strategy of inclusion implemented by the programme in accordance with the experience of a group of beneficiaries selected as informants for this research. Through the analysis of the experiences of 13 welfare beneficiaries participating in the “Bonds Programme”, it is possible not only to compare and contrast the two anti-poverty programmes selected as case studies for this research, but also to analyse the strategy of social inclusion envisioned by the “Subsystem of Securities and Opportunities” from the perspective of a different population category – that is, older adults. In the context of this research, the analysis of the experiences of older adults in the social assistance programmes of the country is highly significant as this generation grew up during a period where social assistance did not achieve the development and institutionalisation of today. Hence, as shown throughout this chapter, for those with life trajectories in poverty, today’s welfare inclusion constitutes a new and unexpected experience. In the light of this, the chapter examines the implications of this late welfare inclusion for the “older-poor” in terms of social inclusion and recognition. In this sense, it is relevant to question whether the participation and inclusion of older adults in the “Bonds Programme” provided conditions of social recognition for beneficiaries that either improved or reduced their status. This involves the analysis of not only the provision of material resources and social services, but also the dynamics of identification and social differentiation encouraged by this specific anti-poverty programme.

1. The “Bonds Programme”: Social Inclusion, Active Ageing and Wellbeing

According to the Ministry of Social Development, the goal of the “Bonds Programme, Integral Support for Older Adults” (“*Programa Vinculos, Apoyo Integral al Adulto Mayor*”) is ‘to contribute to the securities and opportunities of vulnerable older adults’ in order to ‘encourage their social inclusion and active aging as part of the recognition of their rights’ (MIDES, 2017c:5). Based on the programme’s goal, it is possible to identify the conceptual framework

behind the methodological strategy for working with vulnerable older adults. First, there is the goal of providing securities (guarantees) and opportunities for the “social inclusion” of the old, a population category that under the life-cycle approach followed by the system of social protection of the country constitutes a priority group for welfare support, particularly in the context of the ongoing process of population ageing in both developed and developing countries (WHO, 2002). In fact, part of the justifications given by the Ministry of Social Development for the existence of the “Bonds Programme” was based on the evidence regarding the ageing population and how between 2006 and 2015 the national ageing index increased from 55.8% to 86% (CASEN, 2016c; MIDES, 2017c). In 1990 the percentage of the population aged 60 and older represented 10.1%, by 2015 it amounted to 17.5% (CASEN, 2016c). Hence, one of the most important purposes of the “Bonds Programme” is to deal with the problems associated with the growth of the population 65 years and older, with a particular concern for ‘vulnerable’ older adults living either ‘alone or accompanied’, who find themselves ‘socially disconnected’ (MIDES, 2017c:4).

Apart from the reference to the ageing population and the growth of the social category of “older adults” in current Chilean society, the “Bonds Programme” also makes reference to the vulnerability to poverty suffered by this group as well as to the situation of social isolation or disconnection affecting this particular population category. In terms of the “description of the problem” by the programme’s guidelines, it states that apart from the 6.6% of older people living in poverty in Chile (CASEN, 2016c), the “National Survey of Quality of Life in Old Age” (ECV, 2016) also identified two particular concerns among this age group: first, 35% of older adults in Chile felt a ‘lack of company’; and secondly, 63% worried about ‘having to depend on other people’ (ECV, 2017; in MIDES, 2017c:4). Taken together, and in the light of the process of population ageing, the Ministry of Social Development identified ‘the country’s need’ to

‘... [develop] a social programme oriented towards the promotion of active ageing, particularly among ‘the most needy’ older adults’ in order to ‘reinforce their auto-valence (delaying dependency)’ as well as to ‘generate spaces of connection with their peers, and with the networks in the territory’ (MIDES, 2017:4).

As we can see, the key component guiding the “Bonds Programme” is the “active ageing” approach, which in accordance with the World Health Organization (2002) is defined as ‘the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age’ (WHO, 2002:12). In the context of this framework, the term “active”

refers to older adults 'continuing participation in social, economic, cultural, spiritual and civic affairs' rather than only being 'physically active' or economically productive as a result of labour participation (WHO, 2002:12). From this approach, then, participation is a key element for older people's social integration and wellbeing, which must be developed and guaranteed in accordance with older adults' 'needs, desires, and capacities' (WHO, 2002:12). From the perspective of social protection, we can see here a different approach to social inclusion that emphasises labour inclusion or productive contribution, as current anti-poverty programmes seem to consider the diverse realms in which people can participate in and contribute to society. This different approach seems to be sensitive to the 'biographical events' determining this life stage, such as withdrawal from the labour market, the deterioration of health and physical autonomy, widowhood, among others (Filgueira and Rossel, 2015:225), which point to the social implications of ageing, particularly in regards to the 'loss of social roles' and the 'changes in statuses' that happen during old age (Gorman and Heslop, 2002:1144).

To some extent, active ageing and its emphasis on participation and wellbeing during old age involves a significant contrast with the economic view towards population ageing and its stress on the welfare costs associated with the growth of this social category, particularly in a context of low fertility and low employment rates among younger generations (Esping-Andersen, 1999). According to this economic view, the critical issue about population ageing is the increase in the "dependent" population and the growing imbalance between productive and unproductive population groups. This economic concern is justified, and tells us about the "challenges" that the "triumph" of population ageing implies for current societies (WHO, 2002) – challenges that in the sphere of welfare refer to the provision of health and care services, as well as social security and pension systems that can secure minimum wellbeing standards during old age. However, mere access to social services and welfare entitlements during this life stage would not guarantee a good quality of life among this group if older people cannot develop 'social bonds that enable them to stay integrated and active' (Filgueira and Rossel, 2015:228–229). As such, the active ageing approach, as well as the concerns for the wellbeing conditions of older adults, emphasise the critical role played by participation and active social inclusion among this social category, particularly in the light of the risks associated with loneliness during old age due to exit from the labour market, the departure of children from home, living alone, among others (Filgueira and Rossel, 2015).

It is in the light of the above vulnerabilities associated with old age that the Chilean system of social protection through the “Bonds Programme” seeks ‘to increase the bonding of vulnerable older adults with their social, familiar and communitarian surroundings in order to allow an active ageing’ (MIDES, 2017c:1). In this sense, the programme aims to give an answer to the needs of older people aged 65 and over, suffering poverty, and who live alone or accompanied by another person. In order to deal with the needs of this group, the strategy of the programme encompasses ‘to generate conditions for people to access the communitarian network of social protection’ as well as their connection with both ‘public services and the social networks of the community’ (MIDES, 2017c:4). In line with this strategy, the programme follows a “territorial approach”, which includes the development of ‘collective meetings’ as well as the ‘promotion of older adults’ participation’ with their peers in ‘communitarian organizations’, along with ‘the institutional links with the local network of the district’ (MIDES, 2017c:15). All these actions are guided by a “rights-based approach” that includes ‘the access to benefits and social services’, the development of ‘spaces of action and participation’, ‘the conformation of support networks’, and the promotion of ‘awareness about older adults’ rights’, among others (MIDES, 2017c:16).

Regarding the methodological strategy defined by the “Bonds Programme”, it encompasses the same two components of “psychosocial” and “socio-labour” support included in the “Families Programme”. Under the programme’s guidelines, the main purpose of the component of psychosocial support is ‘strengthening’ older adults’ bonds with their ‘familiar, social and communitarian environments’ (MIDES, 2017c:8). This component also considers the definition of a ‘socio-occupational plan’ aimed at ‘preventing dependency’ and ‘promoting autonomy’ among beneficiaries, particularly among those who access the component of socio-labour support (MIDES, 2017c:8). However, in the case of the “Bonds Programme” the socio-labour component is only available to 50% of the beneficiaries selected each year due to ‘budgetary reasons’ (MIDES, 2017c:10). In terms of implementation, the component of “psychosocial” support includes the development of ‘individual sessions’ through home visits to older adults, as well as ‘group workshops’ in which a series of topics are discussed such as active ageing, gerontological training, communitarian participation, self-worth during old age, among others (MIDES, 2017c:9). In the case of the “socio-labour support” component, it also includes individual and group sessions, based on older adults’ occupational plans, which are focused on beneficiaries’ areas of interests. In this sense, and following beneficiaries’ interests, the occupational plans can include a diverse range of activities in different areas such as production, but also in the spheres of participation, art, leisure, every day and instrumental

activities, among others, all activities that can help to ‘promote active ageing, prevent dependencies, and strengthen autonomy’ among beneficiaries (MIDES, 2017c:10).

Additionally, the methodological strategy of the programme includes a component of “offer management” through which older adults can access public offerings, such as older adults’ food programmes, preventative health tests, technical help (provision of hearing aids, lenses, canes, and so on) and basic home equipment (MIDES, 2017c). Finally, the programme includes a component of “monetary transfers”, which in the case of the beneficiaries of the programme includes a “protection transfer”, paid every month to older adults (MIDES, 2017c:10); the maximum value is US\$20, and decreases during the 24 months that the programme lasts (information provided by the professionals interviewed for this research). Older adults in poverty and vulnerability are also entitled to the solidarity pensions of the country, and can receive other regular monetary transfers targeted at people living in conditions of poverty and vulnerability.

2. Beneficiaries’ Profiles and Their First Experiences in the Welfare Field

Following the guidelines of the “Bonds Programme”, the “potential population” of the programme corresponds to adults of 65 years or older, living alone or with another person, and who find themselves in a situation of poverty (MIDES, 2017c). However, regarding the selection of the beneficiaries, the “objective population” of the programme is identified following a series of “priority criteria” (MIDES, 2017c:5), the first being “poverty”, which follows the same socio-economic selection used by the “Families Programme”. Consequently, to be selected in the “Bonds Programme”, older adults must belong to the 10% and 20% of the first socio-economic section of the “registry of households” (the current targeting mechanism of the country), with income levels below, first, the extreme poverty line, and secondly, the poverty line, both lines determined by the CASEN survey (MIDES, 2017c:5). The second priority criteria used by the programme includes “household composition”, which gives a decreasing priority to older adults belonging to a) single-person households; b) two-person households with a companion aged 65 or older; c) two-person households with a companion between 18 and 64 years old; and d) two-person households with a companion younger than 18 years old. The third priority criteria used by the programme to select beneficiaries is “occupational situation”, which gives decreasing priority to older adults without pension, with a pension and with labour income. The fourth priority criteria include “lack of basic services”, which refers to older adults living in houses without access to drinking water. Finally, the last

priority criteria used by the programme is “age”, which gives priority to older adults of older age. Notwithstanding the intricated targeting and selection process followed by the “Bonds Programme”, the final number of beneficiaries is determined by the annual coverage act of the “Subsystem of Securities and Opportunities” (MIDES, 2017c:6), which is also the case in the “Families Programme”. As a result, from the 482,896 older adults identified as the potential population of the programme in 2017, only 11,257 were selected as part of the programme that same year (MIDES, 2017c:5–6).

In terms of the local implementation of the “Bonds Programme”, the number of older adults selected in the region of Valparaíso in 2017 was 1,878 (MIDES, 2017c). In accordance with the information provided by the professionals interviewed for this research, in the specific case of the district of Valparaíso, the local context in which this research was carried out, 130 older adults were selected by the programme during 2017, while the number of beneficiaries selected in 2016 was 124. In the course of this research, 13 older adults were interviewed, all beneficiaries of the “Bonds Programme” in the district – 10 from the 2016 cohort, and three from 2017. The oldest beneficiary interviewed for this research was 81, while the youngest was 66. In terms of gender, 10 of the 13 beneficiaries interviewed were women, while only three were men who were participating in the programme along with their wives as the “Bonds Programme” allows the selection of both partners simultaneously. As identified by the professionals working in the programme, there is a clear predominance of women in the programme, which seems to be explained by the gender profile of the older population in the country and the region. Following the records provided by the CASEN survey, in 2015, 17.5% of the population in Chile were aged 60 or older, while this percentage was 20.6% in the region of Valparaíso. However, in both cases, there was a predominance of women over men, with Chile’s gender distribution of older people across the country being 57.3% women and 42.7% men (CASEN, 2017c). Even though Chile is still in a phase of moderately advanced ageing (Filgueira and Rossel, 2015), the country exhibits clear signs of “ageing feminisation”, mostly due to women’s greater longevity and life expectancy (WHO, 2002:39). This means, among other things, that apart from women’s increased likelihood of being widowed or left alone during old age, older women are more at risk of poverty during this life-stage as a result of a series of cumulative disadvantages, particularly those associated with their precarious, interrupted or non-existent labour trajectories, which results in less access to social security benefits during old age (Filgueira and Rossel, 2015). However, although the “Bonds Programme” states that it follows a gendered approach, such an approach is absent from the identification-formulation of older adults’ needs. In fact, the only specific reference about the

use of this gendered approach relates to the wellbeing matrix used by the programme to assess beneficiaries' life conditions, which must include 'no gender discrimination in the occupational sphere' (MIDES, 2017c:15).

Notwithstanding the above socio-demographic trends behind the significant predominance of women among older adults, in the case of the "Bonds Programme" there are other socio-cultural factors associated with the larger number of women participating in this social programme. As identified by the professionals interviewed for this research, older men showed a more negative disposition towards their participation in the programme compared to older women. This was cited as a challenge when professionals made the first contact with beneficiaries:

'... there were more women than men in the beneficiaries' list [corresponding to the beneficiaries selected by the programme in 2017]. And of the men on the list, very few dared to participate. We told them what the programme was about; that it includes some individual visits at home but that at some point we also have to move to a group stage. And when you say "group", they say "no". We try to be flexible, saying "well, let's see what happens with time" to try to engage them. (...) But in general, men don't like to participate in these programmes.'

(Social Worker 2, Bonds Programme)

According to the professionals' experiences, there are a series of factors associated with the different dispositions showed by women and men to participate in the "Bonds Programme". On the one hand, and similar to what was identified in the case of the "Families Programme", there is a gender imaginary that associates women with "the social sphere" as well as with participation in some communitarian-based organisations. On the other hand, it has to do with older women's life-trajectories in which, through their reproductive work and roles, they were able to find particular spaces and experiences of social participation in public life:

'... It [women's participation in welfare programmes] may be related to that, that social assistance is more of "a women's issue", that they [women] are more engaged with it. Women are the ones who always are in the municipality. There is that kind of discourse.'

(Social Worker 1, Bonds Programme)

'Or that women like older adult clubs or mothers' centres. It's like they [men] are a bit resistant to groups.'

(Social Worker 2, Bonds Programme)

'I think it is something more cultural. Because whether at some moment or because of children and the school, all that led to women meeting together. Mothers' centres, neighbours' clubs...'

(Social Worker 5, Bonds Programme)

In this sense, and as was also identified in the case of the “Families Programme”, there is a clear difference among the gender dispositions to participate and be involved in social programmes between men and women. This seems to be associated, following the above professionals' views, with women's cumulative experiences of involvement with and participation in the sphere of “the social”, which includes both the formal institutions of social assistance, as well as informal and communitarian social networks. In the case of the specific group of beneficiaries participating in the “Bonds Programme” interviewed for this research, only two people had a long trajectory of community participation – a couple, the wife aged 67 and the husband aged 69, with experience of leadership and participation in mothers' centres and neighbours' committees, along with their recent incorporation in older adults' clubs. In addition, there was the case of a widow, aged 71, who participated as president in a neighbour's committee. There was also the case of a single woman, aged 69, who participated in a church group of older adults as well as in some recreational workshops developed by the National Service of Older Adults (SENAMA) in the district. Lastly, there was the case of an older man that because of his previous selection in the “Bonds Programme” in 2006, participated in an older adults' club formed by the beneficiaries of the programme, which represents one of the outcomes pursued by this social programme.

Beyond older adults' participation in communitarian organisations, there were minimal experiences of participation in social assistance programmes by the group of older adults interviewed for this research, which correlates to the under-development of social assistance during the period in which this generation developed their productive life trajectories. In fact, as identified by the professionals working in the programme, for a large number of older adults, being selected by the “Bonds Programme” constitutes the first time that they have had the opportunity to participate in a social assistance programme. This was corroborated by the profile of the welfare trajectories of the group of 13 older adults interviewed in this study, considering only three of them had previously participated in social assistance programmes:

one older woman, aged 66, who participated in the “Bridge Programme” of the previous “Chile Solidario” system; one older man, aged 77, who was previously selected as a beneficiary of the “Bonds Programme” in 2006; and one older woman, aged 81, who participated in the programmes of minimal employment developed during the 1980s in Chile. For the vast majority, then, their selection and participation in a social assistance programme constituted a novel experience, as commented by the professionals working in the programme, which generated a series of questions among older adults about the process of selection, particularly regarding the reasons why they were selected as beneficiaries of this particular social programme:

‘... she [the professional] explained to me that there was a programme called Bonds, and it interested me. Of course, not from the beginning. I thought, “this is weird”, because I did not know who could be calling me. I asked, “how did they get the information that I am an older adult, and that I am 72 years old?”, and I wondered “how and who told them? And where has it come from?”’

(Older Woman, 72, beneficiary of the Bonds Programme, Valparaíso)

‘For me, it was a surprise because they knocked on my door and there was Miss [professional’s name]. She said: “Are you Mrs [beneficiary’s name]?” “Yes”, I said. She told me: “You have been selected for the Bonds Programme that the municipality is carrying out” (...). And I said: “But how did they find me?” ...’

(Older Woman, 81, beneficiary of the Bonds Programme, Valparaíso)

As commented by the professionals working in the programme, it generally happens that older people feel ‘amazed’ or ‘astonished’ when they discover they have been selected for the programme. They express the “strangeness” of the situation since they *‘had never received benefits from the state’* or *‘went to the municipality to ask for something’*, which is often what they tell professionals during the first contact meetings. It seems that without a previous contact or a more personalised interaction with the agencies of the state at the local level, it was difficult for older adults to understand, at first, why this state-social programme had selected them, and no others, and why it had their information. Of course, there was an issue of trust here that was recognised by the professionals, which was particularly salient during the first contact meetings with older adults where they needed to demonstrate that they were real professionals, coming from the municipality, and working in the programme. On the other hand, this was also indicative of the lack of general information that the older people had about the social offering of the country as well as of the mechanisms of targeting and selection used

to allocate social benefits and choose beneficiaries, due to their limited experience with the formal channels of social assistance during their life trajectories. In fact, as the “Bonds Programme” is implemented by “the Older Adults’ Office” of the municipality of the district, it was observed that many older adults *‘had never before come to the municipality’*. Indeed, according to the head of the office, many older adults arrive there because *‘someone told them’* that he or she could access the workshops or touristic activities developed by the office. In this sense, many older adults arrive by *‘spontaneous demand’* when they are in the retirement process, with *‘very little knowledge about the support networks’* or how to apply to benefits such as state pensions and other basic subsidies.

As such, another critical factor to consider here is the level of publicity and transparency regarding the social offer existing in the country. This involves the public advertisement of state social programmes and benefits, along with the level of clarity and specificity with which such information is provided to the whole population. According to the experiences of the professionals working in the “Bonds Programme”, this is an issue that is clearly behind the lack of information or confusion observed among older adults:

‘People do not understand what the programme is because they have never seen it on television. They do not understand what it is, they do not understand the subsystem either...’

(Social Worker 3, Bonds Programme)

‘... during these two years, I think, the programme has been changed like two times, three times, which causes confusion. And I think that the media, of course, does not help much either because the information they give is usually wrong. For example, the “permanent bonus”, the “March bonus”, the famous “March bonus” – they announce it on TV, or the president announces it, and the information is given, but without specifying to whom [the benefit applies]. Then, the next day we find that the “muni” [municipality] is crowded with people asking about who is entitled to the benefit.’

(Social Worker 4, Bonds Programme)

From a rights-based perspective, access to information is critical for citizens to be able to demand their rights as well as to carry out processes of accountability (Cunill, 2010). Institutional infrastructure should accompany public policies following a rights-based approach. Here it is important to consider how the contemporary development of Latin American social protection has justified its action on ‘a rights perspective to human development’ (Barrientos and Hulme, 2008:5), particularly under the growing influence of the human rights framework

across several international development institutions. Consequently, several countries of the region have adopted these types of social policies in order ‘to contribute to the realization of the population’s economic and social rights’ (Cecchini et al., 2015:26). This is the goal or ‘the challenge’ behind the current system of social protection in Chile – namely, to ‘progress towards the building of an inclusive social protection’ that favours the ‘exercise of citizenship based on economic, social, and cultural rights’ (MIDES, 2016c:5), which involves the understanding that social protection is ‘a citizen right based on people’s social belonging’ (MIDESc, 2016:6). This is the “citizenship discourse” or “rights framework” behind the current development of social protection policies in Chile. Nevertheless, if the goal is to contribute to the building of social citizenship through the guarantee of social protection, then it is not enough to focus on the existing social offer but to consider also the level of information and knowledge that people have about it. From the perspective of citizenship this is critical, as knowledge is highly relevant for people to feel entitled to claim certain welfare benefits or rights.

However, in the conditions under which the social protection system works in Chile, based on complex mechanisms of targeting and socio-economic stratification, it becomes difficult for people to fully understand how the system works. This lack of information in turn constitutes a critical factor for welfare beneficiaries to feel fully entitled to their benefits – an issue that, though analysed in greater detail in the next chapter, has also been identified by scholars researching the experiences of welfare beneficiaries from the previous “Chile Solidario” system. In fact, in the light of the high level of ‘sophistication’ of the methods of targeting and selection applied by the “Bridge Programme” of the “Chile Solidario” system, Tabbush identified how poor women ‘ended up’ being selected by the programme ‘without having much knowledge’ about the functioning of the system (Tabbush, 2011:267–268). Further, as found by Ceballos (2015), for poor women it all depended on ‘scores’ and being ‘lucky’ enough to be selected by the programmes and benefits associated with “Chile Solidario” (Ceballos, 2015:174). This sense of “being lucky” was also present among the older adults interviewed for this research, which might have been an expression of the lack of clear information about the functioning of the welfare offer in the country and so in the specific case of people without substantial trajectories of participation in welfare programmes can end up being experienced as a “surprise”:

‘I didn’t know [about the programme], I just got a surprise – that they came to survey me, that they came to visit me to tell me that I was in the older adult [programme], that I was given a place in the older adult [programme].’

(Older Woman, 67, Bonds Programme, Valparaíso)

3. From Welfare Exclusion to Inclusion: The Trajectories of Older Adults

In the context of this research, it is relevant to highlight that one of the most salient features of the contemporary development of social assistance policies in the region is the level of technification or “sophistication” with which the processes of targeting and selection of beneficiaries are carried out. This transformation was guided by the goal of “efficiency” concerning both the selection of the “real poor” or those most in need, and the replacement of discretionary practices characteristic of traditional forms of social assistance in the region. As observed by Andrenacci in the Argentinean case (2009), this transformation has indeed replaced the “classic” welfare office located in every municipality of the country through which goods and services were distributed ‘on request’ (Andrenacci, 2009:13). Under such social assistance conditions, there was no particular “target group” since the beneficiaries were ‘the sum’ of all those who went to that office ‘to ask for things’ (Andrenacci, 2009:13). As a result of these local and discretionary “policies”, it is possible to see how in the case of Chile, following Rossemblatt (2001), the identification of people’s needs, along with the determination of who was worthy of help and who was not, was directly defined by social workers through the “case-work” methodology (Rossemblatt, 2001:577). Then, different from the rights discourse that accompanied welfare development in Chile through the social insurance system, the approach that prevailed among the institutions established to assist non-work sectors and “the poor” regarded them ‘as dependents’ without any formal ‘right to demand entitlements or reject patronizing forms of charitable assistance’ (Rossemblatt, 2001:578). In the light of this, it is clear how one of the most critical issues about traditional forms of social assistance was its arbitrariness in terms of the power that bureaucrats and professionals had to process welfare demands as well as to allocate resources, which required people having to ask for help rather than claiming for it since they were not formally entitled to any pre-established welfare right. Moreover, part of the humiliating implications of this social welfare administration were the subordinated and personalised social relationships in which people in need had to engage in order to get some help. Overall, what was necessary for the poor in such micro-welfare contexts was to be perceived as “deserving” of help.

To some extent, it can be argued that the recent development and technification of social assistance policies in the region have reduced such local and personalised welfare administration. Nevertheless, notwithstanding the existence of general rules and procedures that make the current system seem more “impersonal”, social assistance policies still retain some arbitrary and discretionary implications. This is the case in Chile, as seen in the selection

process of welfare programmes and the distribution of benefits that are conditional to complex selection criteria and targeting methods in which poor people have very little room of manoeuvre. This conditionality in regards to selectivity and eligibility results in the identification of “the truly deserving” (Mkandawire, 2005). In this context, it is important to highlight that, as a process of social identification and categorisation of “the poor”, targeted social assistance, even when technical or sophisticated, can still produce a series of ‘effects on [people’s] self-respect as well as on the respect accorded them by others’ (Sen, 1995:13).

In the light of the moral implications that the process of welfare targeting might imply for the poor, it is possible to reinterpret the feelings of “surprise” and “astonishment” expressed by older adults when selected by the “Bonds Programme”. These feelings, along with both older adults’ questionings about how they were identified and their claims about never before having received any help from the state or the municipality, might constitute reactions against the negative moral implications involved in being selected as welfare beneficiaries. We must remember that older adults constitute a generation with few opportunities to participate in formal social assistance programmes, as these were under-developed during their life trajectories and remained mostly associated with the localised and personalised administration described above. In this regard, it is worth noting that people’s attitudes to and perception of welfare entitlements are affected not only by the current structure of the “welfare field”, which in itself creates conditions for the development of particular “welfare habitus” among beneficiaries (Peillon, 1998), but also the influence of a “generational habitus” in regards to welfare that is shaped by the conditions of socialisation in which different generations develop (Moffatt and Higgs, 2007). Therefore, in the light of the humiliating connotations associated with the discretionary social assistance practices of the past, part of the surprise and questioning expressed by older adults when selected by the “Bonds Programme” could signal the ways in which targeting and welfare selection may threaten people’s sense of respectability. This issue appeared particularly pertinent among older adults with life trajectories in poverty and without much access to welfare support, particularly if we consider the sense of “proudness” and respectability that they attached to the ways in which they were able to deal with the tough circumstances of their lives as stressed when they told me about their life trajectories.

For example, this was the case of an older man, aged 76, who had a tough childhood because of the strong material deprivation suffered by his family, associated with his father alcoholism, gambling addiction and violence against his mother. He remembered how when he was five

years old he had to sleep with his four brothers ‘*on a mattress of corn straw*’, covering themselves ‘*with a leaf of corn*’ as they had no clothes. He remembered how his mother had to work to satisfy her children’s needs, leaving them at 5 a.m. and coming back at 5 p.m., during which time they had nothing to eat, as they waited for their mother to bring food home that her boss gave her every day as help. A ‘*terrible*’ situation, as this older man described it, which led him to work with his father in the building sector when he was only 10 years old. Nevertheless, notwithstanding all this hardship, he stressed how,

Interviewee: ‘... in spite of all that poverty, of all that anguish, of all those issues, we [he and his siblings] did not become bad people, not bad men, bad women, no.’

Interviewee’s wife: ‘None deviated.’

Interviewee: ‘None, none. We could have been criminals, what we could have been! But none came out that way. (...) We all work. We were never criminals. Above all, we had respect. My mom always told us “you have to respect the elderly people”. I was never disrespectful to anyone.’

(Older Man, 76, and Older Woman, 76, couple, beneficiaries of the Bonds Programme, Valparaíso)

As we can see, the experiences of hardship associated with extreme poverty always entailed a risk – that of “deviation”, “criminality” and “delinquency”. Nevertheless, against the odds, this older adult man, along with his siblings, were able to forge and keep their respectability by becoming “working people”, but also by learning key values from their hardworking mother such as respect itself. To some extent, it is possible to see here a generational portrayal of “the deserving poor” in Chile, which combined a disposition to work in order to satisfy the needs of subsistence and reproduction, as well as a cultural capital, acquired through family socialisation, by which people in poverty learned some basic social norms, such as respect for older people, including (likely) other figures of authority. Overall, in the case of this older man, a hardworking habitus began to develop very early in life, working with his father in the building sector at the age of 10. Since then, and once married, he worked for 20 years as a gas track driver. Alongside this job, both he and his wife worked independently from home making kites and selling melons and watermelons in the street next to their home during summer times. However, these informal activities were not very profitable and so, in the context of their participation in the “Bonds Programme”, they applied to the FOSIS entrepreneurship projects and were able to buy four machines to install a bakery in their home, which has become a very successful family business, providing work for one of their daughters and one grandson. This experience, as they told me, was very satisfying for this couple. It also

seemed to be linked, in this particular case, with how the “Bonds Programme”, along with the FOSIS entrepreneurship projects, were able to appeal to beneficiaries’ identification not as “poor” but rather as “hardworking people”, a social identity that these older adults clearly recognised in themselves:

Husband: ‘It’s like the FOSIS and the “Bonds Programme” were interested in us because of our push, our desire, our yearning for achieving things and progress. Then, they said, “these people need, we are going to help them”. It’s not because I say it, it’s because I really believe that they made that decision, and we thank them.’

Wife: ‘We know about people who sell the things they are given and do not take advantage of them, they do not feel capable or do not understand, I have no idea why.’

Interviewer: ‘Do you think it’s maybe that they do not feel capable?’

Wife: ‘It [the bakery business] involves work. You have to work hard. As we are used to working, it is nothing special for us.’

(Older Man, 76, and Older Woman, 76, couple, beneficiaries of the Bonds Programme, Valparaíso)

It is relevant here to note how “needs” is articulated in the above quotation. Different from the negative and passive connotations associated with being “needy”, here we find an active account related to some predispositions or personal features that this couple developed because of their hardworking trajectories. In this sense, the support provided by the FOSIS and the “Bonds Programme” constituted, for these older adults, *‘the little push’* that they needed *‘to progress’*. Nevertheless, as seen in the above quotations, the “ambition” for getting ahead and improving themselves was already there. In fact, it seems it was this ambition that differentiated this couple from “other beneficiaries” of social assistance programmes, “others” that either did not have such ambition or were not able to deal with the “efforts” and “work” needed to “take advantage” of the opportunities provided by the social programmes. Based on this social differentiation, then, this couple could keep their respectability, linked with their “independent” and “hardworking” life trajectories, avoiding any stigmatising identification associated with “passivity” and “dependency”.

Nevertheless, what is relevant to highlight here is how the above process of social differentiation among “the poor” seems to be facilitated by the current orientation of social assistance programmes in Chile, particularly among those connected with entrepreneurship, something that was also identified among the beneficiaries participating in the “Families Programme”. As analysed in the previous chapter, in the context of the anti-poverty strategy

implemented through the “Subsystem of Securities and Opportunities”, FOSIS entrepreneurship projects represent one of the most important components aimed at encouraging the labour activation and inclusion of people in poverty. Notwithstanding the questionable results of that strategy, what is important to highlight here in regards with this anti-poverty strategy is how it seems to re-enact the identification of the “deserving poor” in Chile associated with hard work and independent ambition to deal with people’s precarious living conditions. The previous chapter provided clear evidence of this through the analysis of the entrepreneurship projects developed by poor women, being regarded by welfare beneficiaries as “opportunities” to which it is necessary to take “advantage of” in order to “get ahead”. In the light of the influence exercised by entrepreneurship projects among the subjectivities of “the poor”, some scholars have observed how the anti-poverty strategy in Chile has encouraged a process of identification among welfare beneficiaries associated with an ‘entrepreneur and self-responsible subject’, which, apart from being based on an ‘optimistic discourse’ about people’s poverty and future prospects, helps them to distance themselves from traditional images of the poor associated with delinquency or lack of progress (Codoceo and Sougarret, 2017:378). This notion of the “entrepreneur poor”, as encouraged by current anti-poverty social policies, focuses on the agency and capabilities of the poor ‘to take care of themselves’ and promotes the understanding that poverty constitutes an ‘individual responsibility’ (Aguirre and Iñigo, 2015:222).

Notwithstanding the salience of this “new” entrepreneur identity among “the poor” and the ways in which current anti-poverty programmes have helped to inculcate it among welfare beneficiaries, the key role played by the agency and independent labour strategies of the poor to deal with their living conditions seems to be nothing new in the region. In fact, in the light of the accounts given by the older adults interviewed for this research, the relevance given to people’s agency and capacity for “taking care of themselves” has been a critical factor during most of their life trajectories, as shown in the difficulties of entering the formal labour market, along with the limited welfare support available to these groups in the past. However, what seems to be new under the current orientation of anti-poverty policies is how the independent and informal strategies displayed by the poor to deal with their living conditions, which represented a source of respectability for these groups, are now being institutionalised by social policy, mainly through the offer of entrepreneurship programmes. In that sense, we can see how this kind of anti-poverty programme ends up contributing to the process of social differentiation among welfare beneficiaries in the case of both old and new generations in poverty.

In this context, it is understandable why some older adults interviewed for this research mobilised the “entrepreneur identity” to describe their current achievements, contrasting them with the hardship and deprivation that characterised their life trajectories. This was the case of an older woman, aged 72, who was part of a family of 13 children, in which they *‘didn’t see the bread’*, and so had to take some fruits from the trees near their house to swap for bread and milk at school. Once married this woman continued experiencing significant material deprivation and economic dependency as she married a man that owned a stand in a popular market but was highly addicted to gambling. As she described the transition from her family home to her married life, it was like *‘coming out of the fire and falling into the coals’*. These circumstances led her to conduct self-induced abortions in order to limit her family to two children as her husband could not provide enough money for them to eat and had to ask for help from her sisters and sister-in-law. Once her husband died, she inherited his stand in the street market but had neither the money nor knowledge to work it as her husband *‘did everything, without teaching anything’* to her. She learned *‘underneath, little by little’* until a friend from the street market lent her some money to be able to work in her stand. It was at this time that she was selected by the “Bonds Programme”, the period during which she was very *‘depressed’*, *‘bored’*, without doing so much. Nevertheless, with *‘the help’* she was given from the “Bonds Programme”, particularly from the FOSIS entrepreneurship programme, she was able to acquire a professional oven with which she was able to begin to sell pastries and other local food in the market street. She was also able to participate in a training course to become a vegetable cultivation operator, developing a little greenhouse in her house that provides her with some vegetables for self-consumption. These experiences and achievements developed in the context of her participation in the “Bonds Programme” led this older woman to identify herself as an “entrepreneur”:

Interviewer: ‘So, you have done many things over this time, Mrs [beneficiary’s name], and now you have your oven...’

Interviewee: ‘Yes, I am an entrepreneur. I have a greenhouse. I have tomato, parsley, coriander, chard.’

Interviewer: ‘(...) do you see yourself as an entrepreneur?’

Interviewee: ‘Yes, I feel I am an entrepreneur. And I’m thrifty too. I know how to save.’

(Older Woman, 72, beneficiary of the Bonds Programme, Valparaíso)

In the case of this woman, this entrepreneurial identity seemed to be associated with the new realms of action opened to her as a result of the opportunities and resources provided by the “Bonds Programme”. In fact, as she described it, she is just now *‘coming out’* of the poverty

that she lived, just *'learning'* to manage her money, including her solidarity pension, and she is learning to go to the supermarket once a month to buy and store what she needs for her home. Such improvement in her living conditions during later life made her feel *'proud'* and *'happy'* but was also difficult as she *'never before saw what [she] sees now'*, having to *'learn from poverty'*. She began to leave poverty behind, learning to provide for herself by buying, for instance, *'everything'* that she wants or needs, which she described as something she never experienced before:

'My son says to me, "Mom, you will never learn". "Look", I tell him, "I learned from poverty". He says to me "you don't buy this, that". When my husband was [alive], he didn't ever bring toilet paper (...). Then [after he died], I continued in poverty, you know what I mean? I continued. I followed. I never left it. Now I'm just coming out [of it], (...) because I'm just now learning. I now buy everything I want. If I'm hungry, I buy things to eat, toilet paper, chlorine. I didn't know chlorine before. I never knew a clean pot. Everything was washed with soap. Even I washed my teeth with soap.'

(Older Woman, 72, beneficiary of the Bonds Programme, Valparaíso)

As we can see, part of this older woman's identification as an entrepreneur was connected with the hardship that she experienced during her adult life, particularly when she was married. In this sense, her current achievements concerning her new levels of independence and autonomy seemed to be judged in the light of the deprivations that she experienced before. These deprivations referred not only to the lack of economic and material resources, but also the deprivation of capabilities suffered by this woman, which she was not able to develop during her married life. This issue demonstrates how poverty is a gendered experience (Jackson, 1998; Millar and Glendinning, 1989), which in turn allows us to better understand the gender implications of both the welfare exclusion of the poor in Chile and in Latin America. As the case of this woman illustrates, the under-development of social assistance policies in the country involved, among other things, leaving poor women in an extremely precarious situation as they had to rely almost entirely on their husbands' income and "goodwill". This was precisely the experience of the older woman whose precarious life conditions were highly determined by her 'less command or control over household income', along with her 'greater responsibility for the management' of the few resources available through 'day-by-day budgeting' (Millar and Glendinning, 1989). One of the key issues here, stressed in the account given by the older woman, were the burdens and constraints that household social reproduction entailed for her. In other words, how hard it was to carry out those activities and responsibilities 'involved in the maintenance of life on a daily basis, and intergenerationally',

including the satisfaction of basic needs such as those related to food or clothing, and also to care (Laslett and Brenner, 1989:382–383). It is at this level of everyday life that poor women mostly experience the hardship of poverty as a result of their gender status that regards them as responsible for family reproduction and wellbeing. This hardship can become even harder in the absence of welfare support, and perhaps, in the light of the analysis of the experiences of poor women in the “Families Programme” discussed in the previous chapter, as a result of the particular gender implications that the current expansion of social assistance policies has had on women. This is a critical issue considering the “maternalist” and “familiarist” orientations behind current anti-poverty social policies in the region, particularly CCTs. Nevertheless, considering the life trajectories of older women in poverty, it is possible to identify the positive contribution of social assistance policies to alleviate some of the tasks and burdens associated with daily reproduction for poor women through the provision of additional resources that can give female welfare beneficiaries some space to manoeuvre.

The narrative developed by the above older woman highlights the ways in which she was able to deal with significant deprivation. This emphasis on women’s ability to deal with hardship and managing under difficult circumstances suggests there are gender differences between what it means to be considered a member of the “deserving poor” in the case of women and in the case of men. While men have traditionally been judged in accordance with whether they are ‘good or bad providers’, the judgment of women has focused on ‘whether they are good or bad managers’ (Millar and Glendinning, 1989:372). It is not difficult to understand why poor women gain a sense of pride and respectability from their very hard life trajectories if we consider, in particular, ‘the positive and negative aspects of the gendered relations of poverty’ (Molyneux, 2007:41). This is shown in the fact that even though poor women face significant disadvantage and hardship because of their gender and class positions, they nevertheless can gain a sense of respect and self-esteem from their gender dispositions and adaptations to their living conditions. In the specific case of poor women in Latin America, such negative and positive aspects of the gendered relations of poverty seem to be articulated in the very ‘constructions of femininity’ that have prevailed among the countries of the region, ‘closely bound up with an affective investment in a self-sacrificing or altruistic motherhood’ (Molyneux, 2007:36). This is a positive but very demanding social identity, particularly in the case of poor women, considering how the “investment”, work and sacrifices that it entails must be carried out under circumstances of high deprivation where almost everything depends on women’s “agency”, abilities and altruism.

Part of the debates about the current orientation of anti-poverty programmes in the region, particularly regarding the proliferation of CCTs, have concentrated on how they have come to appeal to the sacrificial identity associated with motherhood. Here lies the contradictory implications produced by the contemporary expansion of social assistance policies in the region – at the same time that it came to provide some material support and opportunities for poor women, particularly in terms of providing resources that can alleviate the burden of daily reproduction, it concentrated primarily on family’s wellbeing and/or children’s future opportunities. As analysed in the previous chapter, what is problematic about this welfare inclusion of women is how their inclusion and participation in anti-poverty programmes is done via their status as mothers and not as a social category of their own. As such, the current agenda of anti-poverty social programmes targeting poor families or children acts to reify those traditional female attributes associated with motherhood connected with “altruism” and “self-sacrificing” work – a social identity that although meaningful for women can obscure the particular gender disadvantages suffered by poor women in both the labour market, the household and even in the welfare field. However, what is problematic here is not this identification in itself but rather the fact that, as illustrated by the life trajectories of the group of older women interviewed for this research, such identification implies a kind of “heroic” motherhood developed under tough circumstances and without almost any help from the state. In this sense, under these conditions of hardship, poor women’s sacrificial habitus has emerged, which, as part of the process of adjustment to their living conditions and gender status, seems to have provided poor women with a sense of pride and respectability about their life trajectories as “sacrificial mothers”.

In fact, in the context of this research, it was possible to find an emblematic example of such a heroic and sacrificial identity through the life trajectory of the oldest beneficiary interviewed for this study at 81 years of age. This woman was married at 18 years old, and struggled to raise their five children as her husband used to ‘*disappear on Saturday to come back on Tuesday*’. One of the problems that she stated she had to face was that in the past women ‘*went to marriage with closed eyes*’ and so she never ‘*made sure*’ about her future husband’s work or considered that ‘*all fishermen were the same way*’. She viewed this as a “personal mistake” that she had to “assume” in order to “keep going” and raise her children:

Interviewee: ‘I settled later because I said, “well, I am guilty of what I am living and I have to keep going, keep going to raise my children”. I sold fish in the street, I went to clean houses, to wash, to iron, all that, because what he gave me was what was left of the coins in his pockets, no more.’

Interviewer: 'With that, you couldn't raise children with that?'

Interviewee: 'You couldn't raise children well! But I raised them anyway.'

(Older Woman, 81, beneficiary of the Bonds Programme, Valparaíso)

This disposition to “keep going” for her children articulates her sense of individual responsibility and guilt, of blaming herself for not knowing before how fishermen were. The internalisation of responsibility nevertheless provided her with a sense of prайд and respectability, since by the process of “keep going” she was able to identify herself as a hardworking mother able to raise her children by herself. The problem with her husband was not only that he was an irresponsible provider but also that he showed a complete lack of interest in assuming any responsibility for the children. In fact, as this woman told me, when their children became teenagers and wanted to go out she told them to ask for their father’s permission, as she always ‘*saw him*’ as the head of the household and ‘*in that sense*’, ‘*respected him*’. Nevertheless, the man always answered that he had ‘*nothing to do with them*’, as it was their ‘*mother, the housewife, who was raising them*’. As a result, she had to assume the responsibility of allowing her children to go out and applying a ‘*hard hand*’ with them, even though ‘*all*’ her children ‘*came out good*’ people.

Nevertheless, when she was 44 years old, she decided, along with her children, to leave her husband as her older sons began to confront their father as he was ‘*abusive*’ and ‘*hit her*’. This decision was made mostly because of her worries that her husband ‘*could have killed*’ one of her children or that her children ‘*could have killed their father*’. As a result, she decided to ask for help from one of her brothers that owned some land in a rural area of the region with whom she did not get along so well, but she approached him anyway ‘*for her children*’. She asked him to let her and her children live in a shack that was on his land, which he agreed to even though the shack did not have electricity, water or sewerage. For her, however, ‘*it didn't matter*’, neither to her children as they knew that was a ‘*slope nearby*’ from which to bring water to the house. Between 1980 and 1997, she lived there, working as a seasonal worker on her brother’s land, harvesting potatoes and garlic, among other vegetables.

After this woman left her husband, she participated in the “minimal employment” programmes created during Pinochet’s dictatorship in the context of the 1980s economic crisis where she worked knitting sweaters for export, remaining in the programme until it finished. This was the first time that she was part of a social assistance programme, because before, as she told me, under the governments of Eduardo Frei Montalva (1960s) and Salvador Allende (1970s), ‘*we had no support*’. In fact, before her participation in the minimal employment programme, the

only experience that she had with a related welfare organisation was with a juvenile judge to whom she requested the custody of her children; this was before she decided to leave her husband when she wanted to have custody of the children in order to go live with her mother in another part of the country. She explained the plan to the woman-judge and told her about her husband. Nevertheless, the juvenile judge rejected the petition, telling her that *'if she had chosen him, she had to keep going'*. And that was precisely what she did, working hard in and outside the home to raise her children at any cost. A sacrificed life trajectory that, in the context of her participation in the “Bonds Programme”, along with the group activities arranged by the programme, this woman has been able to see reflected in other older women like her who also made many sacrifices when raising their children:

'... you get together with other women, other personalities, and have other conversations. We tell each other how we have lived, how we have raised our children, the sacrifices we have made. How we have made a lot of sacrifices in the past to raise our children (...). One had to wash in a trough, and wash diapers by hand because they were cloth diapers and flannel blankets. You had to wash everything by hand and boil them, to make them very white so you could take them to [children] in an emergency, to the hospital...'

(Older Woman, 81, beneficiary of the Bonds Programme, Valparaíso)

Again, apart from the everyday sacrifices that women made in the domestic and caring activities during “the old days”, here we see another sign of “the deserving poor woman-mother” connected with ‘high standards of household cleanliness’ (Shildrick and MacDonald, 2013:292). In this particular case, she refers to the cleanliness of children’s clothes in which women’s social respectability as “good mothers” was at stake. “Cleanliness” can appear as a simple thing but in the past, and under conditions of poverty, it was difficult to achieve as it involved arduous work, a “sacrifice”, as this older woman described it, which is the criteria under which “good motherhood” seemed to be judged among Latin American countries. Here lies the simultaneity and ambiguity that is behind the construction of “femininity” in Latin America in which the “sacred” character connected with motherhood always ‘evokes’ ‘sacrifice’ (Montecino, 1996:196). As such, the respectability of poor women has been strongly associated with their identities as hardworking mothers whose sacrifices have been determined not only by the conditions of hardship under which they have had to develop their domestic and caring activities, but also by men’s lack of responsibility and absence – an absence that has given centrality to mothers’ presence and women’s work in matters of survival and family reproduction, as illustrated by the case of another older women interviewed for this research, aged 66. This woman had to assume all the responsibility of raising her

children after she separated from her husband, who, as seems to be “always the case in Chile”, left not only his wife but also his children:

‘When I separated from my ex-husband, my children were all very little, and I had to start looking for a job. Obviously, as I was a housewife, I had to support my children because the man here in Chile when he separates, he separates from everything, from women and children. Then, three children had to be supported. There was the rent that had to be paid. There were all the expenses required by a home. That’s when I started looking for a job, despite not having studies. I stayed until the 6th year of school, no more.’

(Older Woman, 66, beneficiary of the Bonds Programme, Valparaíso)

Even though this woman described herself as *‘the poorest [child] in the school’*, she loved to go; and in spite of having to go with *‘shoes with holes below’*, she always wanted to go, being the only child that arrived at school in the days of *‘torrential rains’*. Nevertheless, she could not continue studying because her mother took her out of school at the age of 11 in order to work. This was a *‘frustration’* for her but nevertheless it led her to become a “self-taught-person” through which she was able to keep that early sense of pride and respectability that school gave her. As we can see in this case, one of the main costs of poverty both materially and symbolically can be the need to leave school early to start to work, an experience quite common among older adults beneficiaries of the “Bonds Programme” as informed by the professionals interviewed for this research. Lack of education, as illustrated in the previous older woman’s account, was experienced as a disadvantage, especially when she was looking for a job after separating from her husband and had to assume all of the responsibility of providing for her children and home. Hence, in the case of this woman her sacrifices were associated not only with the absence and lack of support from her children’s father but also the obstacles and disadvantages from her lack of studies, particularly in terms of labour insertion. She strongly connected these disadvantages with her sense of self-identification and personal worth, but that did not stop her from working and raising her children by herself. However, the sacrifices of this woman did not stop there as she also had to take care of her mother for eight years as she was terminally ill, a situation that had significant emotional and financial impacts for her as during this period her *‘whole live revolved around her mother’*. This situation reduced her scope of social relationships as well as her chances to work permanently as a market-street seller of second-hand clothes, a commercial activity that this woman *‘loved to do’*. Only a year after her mother died she was selected by the “Bonds Programme”, which came at just the right time:

'... it [the "Bonds Programme"] came just when I was alone because I took care of my mother for many years. My mother had cancer. She was bedridden. So, I did not have time for anything, nothing. And this [selection by the "Bonds Programme"] was very good, because it came to me unexpectedly, in a moment that I needed to go out of the confinement I was in. Because I was sick too.'

(Older Woman, 66, beneficiary of the Bonds Programme, Valparaíso)

4. Social Recognition through Social Assistance

In the light of the hardworking trajectories developed by older adults during most of their lives due to high levels of material deprivation and absence of welfare support, their later inclusion into the welfare field via the "Bonds Programme" was described by the majority of the older adults interviewed for this research as not only an unexpected event but also a rewarding experience:

'I am grateful for the "Bonds Programme" because it cares about older adults, and I was lucky to be part of it (...). It came to me in a moment when I really needed to get out, because there are programmes, activities...'

(Older Woman, 73, beneficiary of the Bonds Programme, Valparaíso)

'For the older adult, it [the "Bonds Programme"] is very good, because psychologically, and in many aspects, it is very good. We [older adults] are taken into account.'

(Older Woman, 67, beneficiary of the Bonds Programme, Valparaíso)

'I love so much the knowledge and the attention that they [the "Bonds Programme"] give to the older adult.'

(Older Woman, 81, beneficiary of the Bonds Programme, Valparaíso)

'It helps the elderly a lot. They send us to the doctor. They help us with money.'

(Older Woman, 72, beneficiary of the Bonds Programme, Valparaíso)

As we can appreciate from the above beneficiaries' accounts, part of older adults' satisfaction with the "Bonds Programme" was explained by the integral methodological approach followed by the programme, which considered diverse components related to beneficiaries' wellbeing such as health care, monetary transfers, workshops and recreational activities, among others. In this sense, and compared to the strategy of social inclusion displayed by the "Families

Programme”, the “Bonds Programme” had a more individualised and particularised approach towards people’s needs that considered the specific circumstances and features associated with the process of ageing. As a result, it was not surprising that part of the satisfaction and positive attitudes expressed by beneficiaries about their experiences of participation in the “Bonds Programme” were mostly articulated by the sense of being “taken into account” and “cared” for as older adults. This sense of “concern about” their particular life circumstances and the needs associated with their life stages seemed to be the result of the targeting process being focused mostly on a particular social category, rather than exclusively on socio-economic need. In doing so, the programme seemed to constitute a source of “affirmative action” for a population group that, as a result of their life stage and the disadvantages accumulated during their life trajectories, face particular risks associated with poverty, isolation and discrimination.

It is important to consider how ageing is not only determined by the physiological changes associated with age but also the fact that it constitutes a ‘social construction’ through which old age is usually defined as the moment ‘when active contribution is no longer possible’ (Gorman and Heslop, 2002:1144). This social understanding about old age seems to explain why this social category has remained ‘invisible’ in the field of development, as older people are mainly defined as ‘economically unproductive, dependent and passive’ (Gorman and Heslop, 2002:1148). Such a social imaginary about older age is associated with negative connotations about people’s social worth during this life stage, which affects the self-recognition that older adults experience about themselves. In fact, as identified by the professionals working in the “Bonds Programme”, when older adults began to participate in the programme, they frequently displayed a negative attitude about the contributions they could bring to society, seeing themselves as ‘*useless*’ and as a ‘*burden*’. Part of the methodology of the programme, particularly through group sessions, contemplates empowering older adults by discussing and “overthrowing” the “myths and stereotypes” that exist about this social category, especially those that regard older people as “childish” and “unproductive”. In this sense, the programme could deal with some of the cultural implications of ageing associated with the changes in roles and status that older adults experience during this life stage, which have a clear impact on people’s self-identification and worth.

In contrast to the “Families Programme” and the dynamics of misrecognition analysed in the previous chapter, the “Bonds Programme” seemed to provide conditions of social recognition for welfare beneficiaries, which can be explained by the specific way in which the programme

selected its target group. In this sense, the programme displayed strategies to identify and target welfare beneficiaries based on ‘positive selectivism’ – that is, to ‘provide additional services and resources for certain disadvantaged groups, without reference to means’ (Thompson and Hoggett, 1996:23). As such, positive selectivism or positive discrimination is, as argued by Titmuss, the provision of such additional services and goods to particular social categories or vulnerable groups made ‘without the infliction, actual or imagined, of a sense of personal failure and individual fault’ (Titmuss, 1967/2006:48). In the light of this, I found that even when the “Bonds Programme” was targeted at older adults in poverty or vulnerability, the construction of older adults’ needs went beyond material deprivation or socio-economic need to encompass those elements associated with the particular circumstances and changes associated with older age. This “particularist” approach seems to have been much needed as a result of the processes of misrecognition suffered by older adults as a result of a generalised view that regarded them as unproductive or dependent, and then as second-class citizens because of their lack of social contributions.

In fact, even though the “Bonds Programme” constituted a source of positive discrimination and social recognition for older adults in its framework and methodological approach, and as such reflected ‘cultural patterns of interpretation and evaluation’ about older adults and ageing that helped to ‘express equal respect’ for this social category (Fraser, 1998:2), it nevertheless had to deal with general negative views about “the old” prevailing in Chilean society and the ways in which this view materialised in different social institutions. What was at stake here, as tackled by the professionals working in the programme, was the general under-appreciation of older adults’ social contributions, which was a misrecognition experienced in different institutional realms and that in one way or another ended up being internalised by this particular welfare constituency:

‘When older adults arrive at the programme, they are super-reluctant and negative about their contributions to society (...). In fact, many say, for example, that they feel that in the health centre they are treated badly, feeling that this abuse is because they are not valued (...). They come to the municipality, and the municipality sends them everywhere because there are different offices, but no one is concentrated [only in older adults]. So, that’s why they feel they are not given the importance, the respect they require.’

(Social Worker 3, Bonds Programme)

‘It is a stage of life in which I think recognition is super relevant to begin to close certain life stages and to open others as well. Because today one tries to install in the discourse

of old people that they retired from work but not from life. And that although it is important to thank them for what they have done for society, including even the upbringing of children, [it is important that they know that] they can continue contributing.'

(Social Worker, Head of the Bonds Programme and Head of the Communal Office of Older Adults, Municipality of Valparaíso)

Here we can appreciate the difficult situation in which professionals find themselves when trying to encourage the participation and connection of older adults with the broader social and institutional networks as a strategy to improve beneficiaries' wellbeing during old age, which requires that older adults can be certain about, and can experience, social recognition for their particular social contributions. Nevertheless, as illustrated in the above professionals' accounts, such experience and certainty about the value of older adults' contributions is difficult to achieve in a social context in which old age seems not to be a source of much respect or social recognition, and when that is translated – or at least experienced by older adults – as bad treatment and disregard in different institutions. This notion was corroborated by the experiences of older adult beneficiaries of the “Bonds Programme” interviewed for this research:

'I see it this way: if I go to the dentist and ask for an appointment, it does not matter if they give me one for the next month. But I do not have to be there at 7 o'clock in the morning, waiting, and then that they tell us the dentist is not available. I am an older adult! Older adults and children should be given appointments first...'

(Older Woman, 69, beneficiary of the Bonds Programme, Valparaíso)

'... As I told you, because of my mom, I met many older adults in the clinic where my mother had dialysis (...). There one realises the reality of the elderly. Why? Because the pensions they receive for having worked a lifetime are too low. They do not have enough to live, not enough. And they struggle, receiving help from a son, a daughter. I do not find it fair. It is not fair. Because if a man, a woman, works all her life and becomes old, how can that person be going through all those needs?!'

(Older Woman, 66, beneficiary of the Bonds Programme, Valparaíso)

These are the experiences of misrecognition of older adults in the broader institutions and services that form part of the welfare regime of the country, which are analysed in more detail in the next chapter. In the light of this, however, it is interesting to identify how a social assistance programme like the “Bonds Programme” seemed to be able to provide conditions of social recognition that are not available in other social services and institutions of wider

access in the welfare field. This goes against Honneth's observation about how these programmes of 'minimal economic safeguarding', like social assistance programmes, do not suffice in terms of social recognition because they would not offer beneficiaries 'chances to participate in an elementary manner in the cooperative context of society by making his or her own contribution' – a condition necessary for people being able to 'grasp his or her self as a full member of a society' (Honneth, 2004:352). Honneth's observation focus on how social assistance programmes can contribute to keeping welfare beneficiaries in conditions of dependency without offering them many opportunities of social advancement, particularly in terms of labour inclusion and economic independence. This in turn refers to the traditional way in which participation in the cooperative relations of society, and then individuals' social contributions, have been thought of in reference to the sphere of productive work.

Nevertheless, as discussed throughout this chapter, social assistance programmes can go beyond an exclusive focus on labour inclusion as demonstrated by the "Bonds Programme", which can be regarded as an innovative feature of the strategy of social inclusion through welfare in Chile. In addition, it is relevant to observe that social assistance, as well as the broader social institutions and services through which the welfare regime of the country is organised and implemented, are part of the "cooperative context of society" or wider social relations where people can or cannot "grasp" themselves as "full members of society". The interesting thing to notice about the "Bonds Programme" is how, in contrast to the dynamics of misrecognition suffered by the older-poor in other welfare institutions and social services, it is able to provide conditions that contribute to the recognition of older adults as full members of society. In this sense – considering the injustices of misrecognition suffered by older adults as a result of the process of devaluation that they experience because of ageing, which more or less translates into the bad treatment received in different social institutions – welfare or social assistance programmes can constitute a space of inclusion, strengthening older adults' sense of membership and recognition. This is the potential of social assistance when driven by the logic of positive discrimination or affirmative action towards particular social categories whose disadvantages are not only determined by material deprivation but also by their social status in society.

In the case of the group of older adults interviewed for this research, I found the additional positive impact produced by the solidarity pensions of the country that provided welfare inclusion and protection to a generation that during most of their life trajectories remained excluded from welfare support, and whose prospects to access social protection during old

age were severely limited as a result of their precarious or non-existent labour trajectories as demonstrated by this chapter. In the light of this, this non-contributory social benefit constituted an “unexpected” entitlement for older adults, which brought significant levels of “relief” to beneficiaries not only because they now had a “guaranteed source of income”, but more importantly because it more or less guaranteed older adults that they would not have to “depend” on others and that they would be able to continue providing by themselves:

‘President [Bachelet] gave us that salary that we were never going to see, the [solidarity] pensions (...). It is something very good because many people had no idea, and never had [social security] savings. My husband never allowed me to have [social] insurance.’

(Older Woman, 72, beneficiary of the Bonds Programme, Valparaíso)

‘As I was a housewife, we have been given an old-age pension. I thank God first, and the rulers that have been (...) for receiving it. [Because] I thought, well, “If I get old, in what am I going to work? If I do not have an income, nothing, I’ll be subordinated to my children. How can that be?!”’

(Older Woman, 81, beneficiary of the Bonds Programme, Valparaíso)

‘It [solidarity pension] is very good because what would I have done if I had very few years of [social security] contributions? [It is] very good because it is money that one didn’t expect, didn’t know, didn’t have.’

(Older Woman, 69, beneficiary of the Bonds Programme, Valparaíso)

As stated in these quotes, older adults were very aware that they would be not entitled to pensions during old age because they were not able to contribute to social security during their life trajectories. The missing contributions, in the case of the older adults interviewed for this research, could be explained by their precarious labour trajectories that included high levels of informality, as well as (and very important to highlight here) intensive reproductive work by women to take care of children and to manage everyday family survival. These circumstances meant this generation of poor older adults remained excluded from welfare during their life trajectories as a result of the under-development of social assistance. Further, as a result of their precarious or non-existent formal labour inclusion, older adults found themselves once again in a situation of exclusion but now from social security protection – a status of exclusion that older adults were sure about, as expressed by beneficiaries’ above accounts. However, this status was modified as a result of the 2008 social security reform through which the country began to provide guaranteed access to social pensions to the 60%

most vulnerable population. This non-contributory social protection measure constitutes the monetary transfer with the highest distributive impact in the country (MIDES, 2015)

Nevertheless, this new system of social pensions in the country cannot be judged only by its distributive impact but also in terms of social recognition. As argued by Honneth, injustices of distribution can be regarded as ‘the institutional expression of disrespect’ (Honneth, 2003:112), where what is at stake is ‘the appropriate evaluation of individuals’ or groups’ social contributions’ (Honneth, 2004:352). In the light of this, it is possible to see how older adults’ high levels of satisfaction, gratitude and relief about their entitlement to social pensions expressed not only a sense of inclusion but also of social recognition of the contributions made through their hardworking and sacrificed life trajectories. As we can appreciate from the above beneficiaries’ accounts, this corresponded mostly to the situation of poor older women who either because of their economic dependency or because of their status as housewives found themselves excluded from the system of social security of the country as it was based on formal labour inclusion. Hence apart from meaning material deprivation for poor women during old age, this also involved a source of disrespect as poor women’s contributions in matters of family reproduction, care and informal work, among others remained misrecognised. This situation affected the majority of women under the social security system of the country and, as analysed in the next empirical chapter, was an issue specifically targeted in the inclusion of the new “solidarity pillar”. However, what is important to consider here is how these non-contributory benefits traditionally associated with social assistance can contribute not only to improve the material conditions of the population in conditions of socio-economic need and vulnerability, but also, as demonstrated by the “Bonds Programme” and the country’s solidarity pensions, can help to provide conditions of social recognition for particular social categories whose life conditions and status in society are determined not only by their class positions but also, and substantially, by their gender and life stage.

Conclusion

This chapter analysed the second case study selected by this research – the “Bonds Programme” – one of the anti-poverty programmes that form part of the “Subsystem of Securities and Opportunities” of the Chilean system of social protection. Through the analysis of the experiences of a group of beneficiaries interviewed for this research, it examined the

strategy of social inclusion displayed by the programme, as well as its implications in terms of social recognition. As a result, it identified a strategy of social inclusion based on a differentiated construction of beneficiaries' needs, taking special attention of the vulnerabilities and implications associated with the process of ageing. Also, as the programme incorporates an integral methodological approach including several components it can go beyond an exclusive focus on labour inclusion and productive activities, and recognise the life stage of beneficiaries and the different realms of social inclusion that can be offered to older adults through welfare. In this sense, and considering how the beneficiaries of the "Bonds Programme" represent a generation mostly excluded from welfare support whose hardworking trajectories were highly determined by material deprivation and intensive reproductive work, the research found that this social assistance programme constituted a positive experience of welfare inclusion for the older-poor. In fact, this social assistance programme provided favourable conditions of social recognition for this social category through its process of selection and targeting based on positive discrimination, as well as through the provision of a space of inclusion and participation in which older adults' social contributions were valued. The same was found to be true of the new social pensions of the country, which seem to favour not only the welfare inclusion of a generation that remained for the most of their lives excluded from welfare support but also the social recognition of the contributions associated with older adults' hardworking and sacrificed life trajectories. Such social recognition, in this case, went beyond the restricted framework associated with the contributory system of social security of the country based on formal labour inclusion and productive work to include groups that during most of their lives partook in informal economic activities and/or reproductive work as mothers and housewives. Overall, the chapter provided evidence about how welfare and, in particular, social assistance can provide conditions of social recognition that help to improve the status of the groups targeted by social programmes, as was the case of the older-poor and, in particular, older women in regards to the "Bonds Programme".

CHAPTER VI

The Citizenship Status of Welfare Beneficiaries in the Context of Chilean Neo-Liberal Welfare Regime: Between Injustices of Maldistribution and Misrecognition

Introduction

One of the main purposes of this research is to explore the citizenship implications of the contemporary expansion and institutionalisation of social assistance policies in Chile from the perspective of social recognition. In order to do that, the previous chapters contemplated the analysis of two different anti-poverty programmes that form part of the “Subsystem of Securities and Opportunities” through which the current strategy of social inclusion of “the poor” is being implemented in the country. These two different cases studies have allowed for the analysis of the anti-poverty strategy of the country in accordance with the experiences of two different groups and generations of welfare beneficiaries. Through this methodological strategy, and from the perspective of social recognition, the research has been able to analyse and identify the different implications that participation in anti-poverty programmes has had for welfare beneficiaries, particularly in terms of social identification and differentiation. However, what remains to be seen is how the “welfare poor” evaluate their conditions of social integration, particularly in regards to the welfare support and benefits available to them and considering the general functioning of the welfare regime of the country. In order to approach these issues, this third empirical chapter concentrates on the analysis of two critical questions. First, to what extent do beneficiaries regard their participation in social assistance programmes, along with other welfare entitlements, as their right? Secondly, to what extent do they see themselves as entitled to claim for welfare support? Through the analysis of beneficiaries’ answers to these questions, this research seeks to identify the status in which poor groups see themselves in Chilean society as a result of their direct experiences with social assistance policies, as well as under the broader organisation of the welfare regime of the country.

1. Self-identifying as a Subject of Rights: Contributions, (Un)Conditional Entitlements and Needs

The first section of the chapter focuses on the different referents from which the sample of welfare beneficiaries interviewed for this research justified their claims to welfare support and, in particular, the ways in which they regarded their welfare entitlements as their right. As such, the first thing to observe is that among the 25 welfare beneficiaries interviewed for this research, almost half of them (11) saw their participation in anti-poverty programmes, along with the rest of welfare benefits received by them, as their right. Among this group, however, there were a diverse range of responses and referents through which welfare users justified their claims to welfare support as a legitimate entitlement. In fact, while some responses were based on people's direct experiences in anti-poverty programmes as well as with other welfare services, others referred to broader issues related to general notions of citizenship and rights. Considering this, among the welfare beneficiaries participating in the "Families Programme", only three regarded their social benefits as their right, two of whom justified their entitlements in reference to citizen's economic contributions through taxes and social security imports:

Interviewer: 'Do you see your participation [in the "Families Programme"], your monetary transfers, as well as the benefits that your children receive at school; do you regard them as a right?'

Interviewee: '(...) Yes, I think so, it is a right as a citizen. Because they [the state] charge taxes and [social security] contributions to the lower class. I think that in part it is people's money [pueblo's money]. At least something that they give to "the people" [pueblo].'

(Married Woman, 42, Families Programme)

'The state does not give you anything for free because you give resources to the state. And I think that those people who say, "no, they live from the State", those people are wrong. Because first, (...) you pay your taxes, your [social security] contributions. You pay for all your things. The state does not give anything for free to people.'

(Married Woman, 26, Families Programme)

As can be identified from beneficiaries' accounts, there appears to be a clear connection between what it is to be a citizen and the mandatory economic contributions that everyone living in the country has to meet, which includes, of course, lower income groups and welfare beneficiaries. Here we have to remember, as discussed in Chapter I, the current organisation of the tax system in Chile, which was defined after the 1980s structural reforms as part of the country's "neo-liberal transformation". Consequently, the national tax system is composed of

two main schemes – income taxes and IVA (valued added tax) – which together amount to 81% of the total tax collection in Chile (Larrañaga and Rodriguez, 2014:23). However, IVA, which charges 19% over final consumption goods and services, represents almost half of the country’s tax revenues (PNUD, 2017:321). The higher significance of general consumption taxes produces negative redistributive implications since IVA can be regarded as a regressive tax because it reduces the consumption capacity of households, particularly among lower income groups (Larrañaga and Rodriguez, 2014; PNUD, 2017). These redistributive inequalities, to some extent, seemed to justify the sense of “ownership” expressed by the above-quoted welfare beneficiaries about public or fiscal resources as they actually came from “the people” or the citizenry in general, and therefore from the certainty that no one is receiving something “for free”. Hence it is as a result of the existence of and compliance with these citizenship obligations or duties that some beneficiaries felt they could claim their right to welfare.

In light of the above discussion, it is relevant to highlight the way in which this first conception of citizenship associated with tax and social security contributions is quite different to the almost unconditional status imagined by Marshall (1950), through which citizens’ entitlements were based on the very fact of individuals’ membership in the society. In contrast to that, what these first welfare beneficiaries’ accounts seemed to stress was a sense of entitlement that was based on the way in which people regard themselves as meeting the economic duties associated with citizenship in Chile. This conception of and reference to citizenship was not exclusive to the younger welfare beneficiaries from the “Families Programme” but was also present among older adults from the “Bonds Programme” when referring to their receiving of solidarity pensions. In this case, some older women expressed a clear awareness of their exceptional status as “social pensioners”, taking into account the fact that they were not able to contribute to social security during their life trajectories, a condition that would fully entitle them to a pension as anyone else:

[Interviewer’s question about if she regards her solidarity pension as her right]

Interviewee: ‘As a right and as a gift.’

Interviewer: ‘Is it like both things for you?’

Interviewee: ‘Sure, like both things together. Because if you did not contribute like other people to social security, they [the state] still give you one [solidarity pension].’

(Older Woman, 81, Bonds Programme)

'I think that in a certain way it [the solidarity pension] is for helping people who do not have one, [people who have] scarce resources like me that never worked in [a formal] waged job.'

(Older Woman, 66, Bonds Programme)

Interesting to highlight here is the fact that these opinions were expressed by two older women who had intense work trajectories but in the informal sector, common circumstance among older women in poverty, as analysed in Chapter V. Nevertheless, in the light of the relevance given by welfare beneficiaries to tax and social security contributions, it could be possible to see here the influence exercised by the “neo-liberal orientation” driving the current organisation of the welfare regime of the country, along with its stress on individual responsibilities and citizenship duties. Such social and cultural conditions in the sphere of social citizenship might be restricting the notion of citizen’s contributions to society to those individual and economic acts associated with paying taxes or with contributing to social security. This can be understood, as argued by some scholars, by considering the way in which privatising welfare reforms have eroded and fragmented the “citizen identity” into three ‘differentiated figures’ – namely, the “consumer”, the “taxpayer” and the “scrounger” (Clarke, 2004:39). Under contemporary welfare reforms, like those developed early on in countries like Chile, it is not difficult to see how the figure of the tax-payer began to enjoy greater social legitimacy, particularly because of its association with economic “independence” based on waged work, in sharp contrast to the denigrating identity associated with “welfare dependency” (Fraser, 1993). These opposite citizen identities in turn became associated with different sections of the welfare architecture: one “contributive”, associated with the “social insurance” model; and the other “non-contributive”, corresponding to the field of “social assistance” in which beneficiaries ‘seem to “get something for nothing”’ (Fraser, 1993:11).

To some extent, some of the above elements seem to have shaped the accounts given by welfare beneficiaries analysed so far in the chapter. This is plausible considering how the structural reforms of the 1980s in Latin America, and in particular the complete “neo-liberal transformation” carried out in Chile under Pinochet’s military regime, involved a severe dismantling of the welfare architecture in place in the country until the mid-1970s through strong privatising reforms and discourses. In this sense, the principles guiding the current organisation of the welfare regime of the country correspond to those settled by the liberalising welfare reforms of the 1970s through which a residual welfare regime was established in Chile. This new “residual” or “liberal” welfare regime, as analysed in Chapter I, established dual and individualist conditions to access social security in the country. Consequently, while the

pension system is based on a mandatory system of individual capitalisation through which individual contributions are administrated by AFPS (private administrators of pension funds), access to health insurance is based on a dual system through which individual mandatory contributions can go either to FONASA (public insurance) or ISAPRES (private organisations providing different and better-quality insurance plans). Therefore, the social security system currently in place in the country rests heavily on individuals' contributions as the guarantee to access better pensions or high-quality health services in the private sector is directly determined by citizens' economic contributions based mainly on their status in the labour market.

Under the above welfare organisation and conditions to access social security, it is not surprising that welfare beneficiaries in Chile mobilise references to citizens' contributions to explain how things work in practice. Nevertheless, as widely demonstrated throughout this research, this social security system is less significant for lower income groups as they work under precarious conditions or in the informal sector. This means that they have to rely mostly on non-contributory social protection, including public health services and social pensions. As such, the "tax-payer" enjoys high legitimacy considering how citizens' economic contributions shape significantly the justifications given by welfare beneficiaries when referring to their welfare entitlements or their exceptional status as "social pensioners". This could be an indicator of beneficiaries' awareness and perhaps self-protective attitudes towards any chance of being identified as social assistance dependents. Beneficiaries worried about being seen as receiving "something for nothing" in circumstances where in the context of liberal or residual welfare regimes 'all government programmes are financed by "contributions" in the form of taxation' (Fraser, 1993:12) either, like in the Chilean case, through general revenues from IVA or from direct workers' social security contributions.

Nevertheless, it is relevant to highlight how under the current welfare regime, but as was also the case under the social security system that prevailed in Chile prior to the "the neo-liberal transformation", citizens' contributions, particularly as workers in the formal labour market, has constituted the crucial condition to access the realm of social citizenship and welfare rights. In fact, historically, access to social citizenship in Chile has been determined by citizen's work status but also, and very importantly in the context of this research, by citizens' gender status. Prior to the welfare reforms of the 1980s, "citizens-workers" in Chile were expected to be men, the main household providers and in charge of family dependents (Roseblatt, 2001). In the light of this, it is possible to appreciate how social citizenship in Chile followed the

“breadwinner model” under which women’s contributions as housewives and mothers ‘did not for the most part make them full citizens’ as their activities were seen as ‘unproductive’ (Roseblatt, 2001:565). As of result of this model of social citizenship that gave huge centrality to waged-workers’ contributions, the productive activities developed by “the poor” in the informal sector as well as women’s work as housewives, mothers and even productive workers, enjoyed far less social recognition as these activities and contributions did not guarantee these social categories full access to social citizenship rights. This lack of recognition, as analysed in detail in the case of older adults from the “Bonds Programme”, was more striking for “poor women” as their activities as mothers, carers and/or informal workers did not entitle them to full social protection. This very precarious status was even worse under the previous welfare regime considering the scarce welfare support available to “the poor” as a result of the under-development of social assistance.

In the light of the dynamics of misrecognition produced under the previous welfare regime, which was particularly salient for poor women, it is interesting to observe how the current pillar of solidarity pensions seems to articulate a sense of entitlement among some older women, which is justified by pointing to their social contributions as “mothers” and “housewives”:

Interviewee: ‘... I never contributed [to social security]. It [solidarity pension] is a gift that we are given in old age.’

Interviewer: ‘Do you see it that way, as a gift?’

Interviewee: ‘I see it as a gift (...), and as a payment for all the sacrifices we made giving children to the country.’

Interviewer: ‘Is it like a recognition of that?’

Interviewee: ‘A recognition as a mother. As a mother and woman, of course...’

(Older Woman, 81, Bonds Programme)

[Talking about her right to welfare support through participation in the “Bonds Programme”, and considering her entitlement to a solidarity pension]

‘... when I see my president, it’s like I’m the housewife. I have to watch over the children. Then, why not? [referring to their welfare entitlements]. If I am raising my granddaughter, my children, well, why cannot the state give [something] to me? I am also a person (...) I am Chilean.’

(Older Woman, 67, Bonds Programme)

Hence, there was a sense of “reciprocity” from which these older women seemed to justify and legitimate their current entitlements based on the work and sacrifices they had carried out in order to raise “the citizens of tomorrow”. This civic dimension attached to motherhood seemed to constitute the basis from which some older women could identify and claim their contributions to society, since raising children transcends both the intimate space of the family or the “mere” reproductive-survival dimension. It was this civic dimension of motherhood that led some younger women not only to claim their welfare rights but also to criticise the lack of opportunities existing in the country, thinking about their children and the general situation of younger generations:

‘... As a housewife, I worry about my children having the tools to be good people in the future (...). If one pays taxes and performs one’s role as a citizen, the country should also give tools to the people of the country.’

(Adult Woman, 44, Families Programme)

Perhaps, in the context of Latin America, it not difficult to understand why women from different generations are able to justify welfare claims and entitlements on the basis of their identification as mothers, considering the persistent maternalism from which women’s public identities or citizenship have been mobilised at different periods and in different social spheres, including welfare. In fact, as analysed in Chapter III, the historical development of welfare provision for women in the region has been systematically ‘based on *maternalist* assumptions’, which has meant, in practice, that their entitlements have been granted ‘by virtue of being a mother’ either today or tomorrow (Molyneux, 2007:5). The maternalist construction of women’s needs is particularly salient in regards to poverty relief as mothers have been among the first constituencies ‘to be recognized as social policy claimants’, although this has been mainly due to public interest in children’s wellbeing (Molyneux, 2007:5). Hence this is an ambiguous status, since even though maternalism has involved ‘a recognition of women as citizens’, it justifies women’s citizenship on specific and ‘gender differentiated values’ related to ‘motherhood and domestic life’ (Luna, 2001:37); it has not resulted in a proper (re)distribution of rewards and opportunities that could institutionalise and support, in a gender-sensitive way, the full inclusion of women in society. To a high extent, these factors constitute the main elements at stake in the current discussions about CCTs in the region as they provide social visibility and some material support for poor mothers’ care and reproductive work but without much attention to the gender and class inequalities that make poor women particularly susceptible to poverty.

Nevertheless, as noted by Staab (2012), CCTs are by no means the only social policy instrument through which we can evaluate current welfare developments in Latin America, along with their potential impact on gender equity. In fact, in the context of Chile, a case in point is the 2014 social pension reform carried out during Bachelet's first administration through which, among other measures, the current non-contributory or "solidarity pillar" of today's system of social security was established, which has significantly benefited older women such as those interviewed for this research. At the beginning of 2017, non-contributory pensions were paid to more than 1.3 million people, a large proportion of whom were women²⁸ without paid work trajectories or with intermittent and sporadic jobs that entitled them to rather small contributory pensions (PNUD, 2017:321). This population category was particularly disadvantaged by the new individual capitalisation system established as a result of the welfare reforms of the 1980s in Chile, as it 'tied pension benefits more strongly to individual risk and contribution history' (Staab, 2012:308). In this sense, the new private contributive system ended up reproducing class and gender inequalities (Yañez, 2010) since people with precarious, intermittent and informal trajectories, many of them women, had access, in the best of cases, to very low contributive pensions; and those without labour trajectories as a result of domestic and care activities were not entitled to any non-contributive pensions in later life (PNUD, 2017; Yañez, 2010). As such, this produced a sharp increase in the risk of poverty during old age for a large number of working groups, and especially for women (Yañez, 2010) since the private and contributive system did not recognise the unequal conditions of integration into the labour market for women (i.e. gender gaps regarding income and sectors), nor "the opportunity cost" that their reproductive work entailed.

In this context, the 2014 pension reform, and in particular the non-contributory pillar, has had significant gender-equity implications, as it guaranteed a solidarity pension to 60% of the population who were disadvantaged by the previous system, among which, as noted above, women were particularly over-represented. In addition, it gave high 'visibility and specific treatment of gender-related issues' as demonstrated by specific measures such as "the universal credit per child born alive" (*Bono por Hijo*), a supplement benefit added to every mother's pension fund in the country, which although limited in scope can be regarded as 'an official recognition of and reward for maternal care work' (Staab, 2012:311). This social recognition related to specific affirmative action measures or positive discrimination is

²⁸ According to the results of the last CASEN survey, in 2017, 27% of the population aged 64 and older were receiving pensions from the non-contributory pillar; 34% of women, and 17.6% of men in this category (CASEN, 2017).

perceived as justified by older women since, as identified in beneficiaries' accounts, they see themselves as entitled to solidarity pensions because of their trajectories as mothers and the contributions made to the country through this role. Such a sense of recognition, even though not unconditional as it is granted to women under a maternalist basis (Staab, 2012), seems to be particularly meaningful during old age, and for those living under conditions of poverty. In fact, as discussed in Chapter V, solidarity pensions produced strong feelings of being "taken into account" and "cared about" by the state as the majority of the older adults interviewed for this research did not expect to receive a pension during old age precisely because of their lack of social security contributions. These circumstances explained beneficiaries' feelings of "relief" and "gratitude" about this later welfare entitlement – feelings that in turn seemed to express a sense of recognition through which older adults, most of them women with trajectories of hardworking motherhood carried out under conditions of more or less persistent poverty, can feel that their lives and wellbeing matter. This experience of recognition among the older adults interviewed for this research seemed to be strengthened by their participation in the "Bonds Programme", which, through its integral methodology and rights-based approach, was able to foster a view of their entitlements as the right of older adults:

Interviewer: 'Do you think the participation in this programme ["Bonds Programme"], along with the receiving of the solidarity pension, do you consider them as a right?'

Interviewee: 'Yes, a people's right, of course. As I told you, this type of programme has been very good for older adults because they are taken into account. Because people tend to be very lonely, and shut themselves up. For the same reason, because there is no money to go out. There is no money for the bus. No money for going out and having a little ice cream or a little drink when he is thirsty in the city centre. There is no money for anything. This ["Bonds Programme"] takes him a little out of his routine.'

(Older Woman, 73, Bonds Programme)

'... now (...) we [older adults] have these rights. And as I told you before, it's very good that the government cares about older adults because there are a lot of older adults who are at home. They do not do anything. They do not have any activity. They do not know about their rights...'

(Older Woman, 73, Bonds Programme)

Different from the first reference to citizenship articulated by younger welfare beneficiaries from the “Families Programme” who justified welfare entitlements because of citizens’ economic contributions, the older adults in the study had a more differentiated and unconditional conception – one that referred to a particular social category, older adults with specific needs related with lack of activities, isolation and scarce economic resources, all critical issues related to people’s ageing, which in turn legitimated a particular social concern for the wellbeing of this group. This formulation of older adults’ needs, even though connected with economic resources, was not fully determined by them, since claims about older adults’ needs pointed to more substantial issues, such as not being able to continue developing everyday activities either productive or leisure-related, which impeded their normal participation in society and therefore impacted negatively on their wellbeing conditions – a critical issue that goes beyond the mere satisfaction of basic or survival needs. To some extent, it is possible to see how this wider and more substantial conception of need relates to the conditions and capabilities that people have to integrate and participate in society, which correlates to Marshall’s original formulation of social citizenship. Beyond the specific goal of securing ‘a right to minimal economic welfare and security’, one of the most important elements regarding social rights is the way in which they can provide or guarantee a ‘right to participate in the social heritage’, thereby allowing people ‘to live the life of civilized being’ in accordance with the social standards of the epoch (Marshall, 1950:302–303). Social integration and participation nevertheless that requires sensitivity to people’s differentiated conditions and needs as they play a significant role in the real capacities and opportunities that individuals have to be a part of and to enjoy that common heritage. Social assistance can contribute to this when, as demonstrated in the “Bonds Programme”, the construction of people’s needs and the processes of selection and targeting are based on the logic of “positive discrimination” or “affirmative action”.

2. The Moral Implications of Targeting: Luck, Opportunities and Merit

While the above section analysed the welfare beneficiaries who regarded their participation in anti-poverty social programmes as well as other welfare entitlements as their right, this section focuses on those beneficiaries that did not regard them as such. Therefore, the aim is to identify the factors that impeded beneficiaries’ ability to feel fully entitled to welfare support. The first factor discovered by this research was how the mechanisms of targeting through which welfare beneficiaries were selected in social programmes appeared to impede an experience of full entitlement, as expressed in the following account:

Interviewer: 'Do you believe that the reception of (...) these benefits [from the "Families Programme"] is a right?'

Interviewee: 'No (...), because it is something that (...) is like "by the luck of the draw" [Chilean saying: "a la suerte de la olla"]. I mean, although I am part of this programme, I cannot say "this programme is my right", no. It is "by the luck of the draw". Without knowing [about the programme], they ["Families Programme"] called me.'

(Adult Woman, 28, Families Programme)

As we can see, one of the main issues that impeded this woman to identify her participation in the "Families Programme" as "her right" was the fact that, overall, she saw it as depending on being "lucky enough" to be selected by the programme. This exemplifies how welfare selection can be viewed as something that does not depend entirely on beneficiaries' will, and that in turn is not under people's control, as succinctly expressed in the popular Chilean saying: "by the luck of the draw". This sense of being "lucky" was also confirmed by the fact that she was approached by the "Families Programme" without any previous knowledge of it, and without even having applied to it. For this woman, then, "being lucky" came to express the unexpected selection and inclusion in this anti-poverty programme, suggesting perhaps the way in which other welfare beneficiaries experience their interactions with and within the welfare field. Another example was the case of a woman from the "Families Programme" who, before her selection in this programme, applied to the previous "Bridge Programme" when she was diagnosed with cancer and was facing the associated individual and family impacts. Notwithstanding her situation, when she approached welfare officers in the local municipality, she was told directly that selection in the "Bridge Programme" was mainly an issue of luck:

'I went to the municipality to know how it worked, the [Bridge] programme, because I was in need because of my illness (...). When I went to the municipality [to ask for her inclusion in the "Bridge Programme"], "no", they told me, "[people] enter [the programme] by luck". So, I left (...). And after a few months they [professionals from the "Families Programme"] showed up here, as I was telling you, and for me, it was a nice experience and good support that I didn't expect.'

(Adult Woman, 38, Families Programme)

To some extent, the above experiences express the current "common sense" in the welfare field in Chile where, as discussed in previous chapters, people are not able to apply to the emblematic anti-poverty programmes since selection is determined by the processes of targeting, managed at the central level by the Ministry of Social Development as well as by other national organisations. In this centralised welfare bureaucracy, local institutions such as

municipalities, along with its professionals, have no major influence on the processes of selection and targeting, although they may have some influence at the point of implementation of social programmes. As identified through the analysis of the two anti-poverty programmes selected as case studies for this research, the process of targeting and selection of welfare beneficiaries are highly technical and intricate. Further, apart from identifying those in poverty in accordance with official national statistics provided by the CASEN household survey, each programme also has its own priority criteria and must adhere to its annual budget. Under these conditions, it is easy to understand how for welfare beneficiaries, and even perhaps for some front-line welfare officers, the whole process of selection in anti-poverty programmes in Chile ends up being seen as an issue of luck, or in other words of people having “good or bad fortune”. In the case of the previous two women, this “good fortune” was determined by the fact that *‘without knowing or expecting it’* they were both selected for the “Families Programme”. In this sense, welfare selection was seen as something that suddenly happened to them, depending completely on good luck.

Under these “fortuitous” circumstances, it makes sense that welfare selection may be associated with feelings of happiness and reward among welfare beneficiaries. In this sense, selection seems to constitute an “exceptional” experience that to some extent makes beneficiaries feel “special”, considering, as pointed out in the following account, not everyone has the good fortune to be selected by these programmes:

‘... I could have said “they [“Families Programme”] gave me a small course, they could have given me more”, when in fact it is something that was given to you. It is a benefit that not all people are given. Then, one has to be grateful more than anything.’

(Adult Woman, 44, Families Programme)

Following this quote, it would be possible to conclude that, if selection in anti-poverty programmes depends on luck since people are not allowed to claim for their inclusion in accordance with their needs and wants, and considering the fact that not just anyone is selected by welfare programmes, then being selected by these programmes constitutes in itself a very positive event in the lives of people in poverty. This positive experience is not only determined by the material benefits associated with the selection in anti-poverty programmes but also, and more importantly, by the subjective and symbolic implications that this selection has for people. In fact, welfare selection seems to be experienced as a kind of “privilege” among those few “chosen” by anti-poverty programmes, who thereby feel touched by good luck and fortune. As expressed in the previous woman’s account, this privileged experience

requires people to be grateful as selection, and all the benefits associated with it, can be regarded as a “gift”: a *benefit* that is *given away* to people. As such, this points to the traditional representation of welfare benefits and social assistance as “gifts” but not as “rights”, which has been re-enacted by the current dynamics of the welfare field in Chile where the processes of targeting and selection in social programmes appears so technical and intricate for welfare beneficiaries that they end up regarding their inclusion in anti-poverty programmes as an issue of luck and good fortune.

Nevertheless, it is important to observe how the current focus guiding social assistance programmes, in most of the cases, is on strengthening people’s agency and encouraging active labour inclusion, which includes entrepreneurship activities. As such, it would appear that showing “gratitude” is not enough to be considered a “good” or “deserving” welfare beneficiary. More than anything else, what is demanded today from people, and especially from poor women, is that they take advantage of the “opportunities” associated with the “privilege” of being selected as beneficiaries of social assistance programmes:

‘It [selection in the “Families Programme”] is an opportunity that doesn’t happen to anyone (...) Whoever is selected has to take advantage of it (...) because they [welfare institutions] do not give it to everyone.’

(Adult Woman, 28, Families Programme)

‘I think that everyone has to be given an opportunity [to participate in welfare programmes like the “Families Programme”]. Later, it will be seen who is making the most of it, regarding the benefits given to you.’

(Adult Woman, 42, Families Programme)

‘I think everything is about that: if you are given the opportunity to get ahead, I think that we just have to take it. That’s what I’ve done: I’ve taken every opportunity that the [Families] programme has given me.’

(Adult Woman, 26, Families Programme)

As we can see, the privilege of being selected in a welfare programme is signified as such not only because of “the lucky factor” and the fact that “not anyone” is selected in these programmes, but also because it represents a crucial “opportunity” for poor women to “get ahead”. While this was identified in Chapter IV when analysing the participation of women in the “Families Programme” and particularly those engaged in micro-enterprise projects, what is important to highlight here is how the imperative to see selection in anti-poverty programmes

as an “opportunity” that requires beneficiaries “to make the most of it” seems to be related with the kind of welfare contract to which people are “invited” to participate under the current individualising and responsabilising orientation of social assistance policies in Chile. This orientation, as identified by scholars analysing contemporary social policies in the country, has positioned welfare beneficiaries as the main ‘receptors and reproducers’ of an ‘ethical-labour discourse’ that stresses key values such as ‘individuality, entrepreneurship’ and ‘work’ as the basis of individual dignity and social worth (Codoceo and Sougarret, 2017:372). Such a discourse seems to be offering a new source of social legitimacy to make use of welfare programmes and benefits among the poor, since under this welfare approach beneficiaries are no longer regarded as mere “receptors” of social policy but rather as active “agents” (Arteaga and Iñigo, 2015). The active conception of welfare beneficiaries, as demonstrated by this research, translates into the imperative of “taking advantage of” the opportunities opened as a result of selection and participation in anti-poverty programmes.

It is according to the ideological and normative framework encouraged by the current orientation behind contemporary social assistance policies in the country that, as exemplified in the case studies chosen for this research, today’s anti-poverty social programmes in Chile focus mainly on ‘providing assets, strengthening capabilities, and promoting the figure of entrepreneurship’, all strategies that appeal to ‘the agency of each individual and their families to overcome their disadvantaged social positions’ (Arteaga and Iñigo, 2015:219). The term “individuals”, to a high extent, corresponds to women from poor households (such as those interviewed for this research) who are being appealed to directly by the state to involve themselves in this neo-liberal project of social inclusion and recognition that promises opportunities of social integration and social mobility that are based almost exclusively on poor people’s agency and capacity to take risks – for instance, through entrepreneurship projects. This promise of social inclusion and recognition in the context of today’s social assistance policies is always conditional on people’s merits, which is precisely what beneficiaries are referring to when they emphasised the need, almost the demand, to take advantage of the opportunity of being selected to participate in anti-poverty programmes:

‘If you are being given the opportunity to do this [participate in the “Families Programme”] to learn something so that later on (...) you can be on your own, it would be foolish to not take advantage of it. Because, (...) I can learn cooking, hairdressing, and then, I can put a signpost [outside her house saying]: “haircuts” (...). Some three, four haircuts a day would be quite good.’

(Adult woman, 28, Families Programme)

'I believe my mother did not know how to take advantage of the opportunities that were given to her at that time [when she participated in the previous "Bridge Programme"]. Because my mom wasted the money, then, she could never rise (...). I think one can break barriers. And since my mom did not take advantage of it [the opportunities opened by her participation in the "Bridge Programme"], I did. I took advantage of every moment, every instance, every course [provided by the Families programme].'

(Adult woman, 26, Families Programme)

'It is fifty and fifty: 50% came from the government, but the other 50% has to be done by you. Because there are people who are given support but they do not progress, because they don't want to (...) I've heard about people from FOSIS some years ago who were given, for example, sewing machines but that they ending up selling or giving them away.'

(Adult woman, 42, Families Programme)

In this sense, it is possible to see how the opportunities "opened" or "offered" to poor women by anti-poverty programmes are associated with the chance *'to be on your own'*, *'progress'* and *'break barriers'*, all promises of social mobility that depend significantly on people's attitudes and action; in other words, the other 50% of the formula of social inclusion to overcome poverty based mostly on micro-entrepreneurship projects, as analysed in Chapter IV. In line with this view, it follows that when these promises do not come true and entrepreneurship projects do not work, the reason given points to people's own failures or mistakes, such as *'not knowing how to take advantage of opportunities'*, being *'foolish'* or simply they *'do not want to progress'*. These individualistic explanations stress personal responsibility for people's social conditions, which corresponds with the findings of the large-scale study "Voces de la Pobreza" ("Voices of the Poor") carried out by the "Fundacion Superacion de la Pobreza" (The Overcoming Poverty Foundation) in Chile in 2010. Based on group interviews with 486 people in poverty across the country, the study identified how under the current influence of "the neo-liberal paradigm" the chances that poor people have to dignify their status in society are strongly influenced by normative orientations that stress individuals' *'entrepreneurship capacity or personal initiative'* (FSP, 2010:114). In the light of these findings, the study argued that such an "entrepreneurship culture" has led to the emergence of a "new" *'culture of effort'* among "the poor" in Chile, characterised by both a high *'spirit of self-improvement'* (*espíritu de superacion*) and strong aspirations of social mobility (FSP, 2010:24) – personal characteristics that beyond the specific case of "the poor" constitute key cultural traits of the so-called "enterprising Chile" ("*Chile del emprendimiento*"), as identified by the

large-scale study carried out by Mayol et al. (2003). In this “Chile”, everything rests on individuals’ capacity ‘to create [their] own opportunities’ as well as on ‘taking advantage’ of those found out there (Mayol et al., 2013:162).

In the light of the cultural and ideological conditions shaping the experiences of “the poor” and “non-poor” population in Chile, it becomes clear why some of the welfare beneficiaries interviewed for this research, particularly those younger adults in the “Families Programme”, articulated the notion of “opportunities” as well as the need to “take advantage of them” when they discussed their experiences of selection and participation in anti-poverty programmes. Overall, under the influence exercised by current neo-liberal values associated with individual effort and people’s entrepreneurship capacities that are regarded as crucial to overcome poverty and achieve social mobility, citizens’ social worth and individuals’ self-esteem seemed to be defined precisely by the exhibition or not of such individual “aptitudes”. In fact, current social assistance policies constituted one of the crucial contexts in which this kind of “agentic citizenship” is being enhanced, considering, as analysed above, how the opportunities of social inclusion, recognition and social mobility offered to “the poor” remain mostly conditional on beneficiaries’ personal initiative and individual responsibility. What was found here, then, was an individualising welfare contract that apart from neutralising the possibilities of complaint among welfare beneficiaries, left in the shadows all those “external” factors that could explain people’s troubles to get ahead, even after having participated in anti-poverty programmes:

‘If the government can help you but people do not want to rise, then, do not complain. Do not say “the government has not helped me”. But have you done something? Have you knocked on doors? (...). If you want to do things, you can do them with the help of the government, that is what I say.’

(Adult Woman, 42, Families Programme)

Interviewee: ‘... sometimes to get ahead one has to make a lot of sacrifices (...). But if you know how to take advantage of the opportunities, you will do well, if you stop seeing the “buts”.’

Interviewer: ‘Are there other people who have negative opinions about the [Families] programme?’

Interviewee: ‘Not so negative but they do not find that their life has changed a lot. Because maybe these people did not enrol in all the courses. Some left the programme. In fact, some of my neighbours left the programme with the excuse that they did not have time,

even though they were young (...). They began to see many faults in the programme, and they left the programme. I think it was just that they did not want to take advantage of the opportunities.'

(Adult Woman, 26, Families Programme)

It is, in fact, an individualising welfare contract that carries with it a particular version of the deserving welfare beneficiary, one that must exhibit a series of merits such as “the will to rise” and make sacrifices for getting ahead. Consequently, those beneficiaries that do not fit this deserving behaviour are those who ‘*complain*’ and see only the ‘*buts*’ while they participate in welfare programmes or receive other benefits; mere ‘*excuses*’ that hide the lack of merits showed by people that do not have the necessary individual attributes to take advantage of opportunities. These dynamics of identification and social differentiation developing inside the welfare field in Chile under the current individualising and responsabilising orientations seem to make it more difficult for people to express their critiques or complaints about their benefits, or their claims for different or better entitlements. If people do that, they risk being identified with those undeserving beneficiaries that complain simply because they do not have the necessary merits to make the most of their experience in anti-poverty programmes. In this sense, under the individualising orientation of social assistance policies in Chile today, what seems to be at stake for welfare beneficiaries is to be identified and then recognised as deserving – namely, as having the individual merits that justify their selection in these programmes as well as the receiving of other welfare benefits. In short, participation in anti-poverty programmes constitutes an opportunity but not a right because it always depends on beneficiaries’ merits.

At this point, it is worth noting how this type of deservedness identified among current welfare beneficiaries interviewed for this research has to been seen in the light of the “meritocratic ideal” and the way in which this has become ‘a predominant cultural value’ in contemporary Chilean society (PNUD, 2017:241). In fact, under the conditions imposed by the Chilean “neo-liberal transformation” in terms of the organisation and reproduction of society, it has been identified by scholars how a new image of society began to emerge in the country, ‘one perfectible mobile and competitive’ whose most cherished values are those of self-effort and individual success (Araujo and Martuccelli, 2012:115). This “meritocratic ideal” associated with the notion of “equality of opportunities” (Araujo and Martuccelli, 2012), as analysed in detail in Chapter I, constituted one of the new referents of justice from which “neo-liberals” in Chile justified both economic and welfare reforms, and the replacement of previous state redistributive policies for residual social policies. Under the spread of these cultural and

normative orientations since the 1980s, it is not rare to find a high valuation of “personal effort” among the Chilean population, which has gone hand in hand with the expansion of more “individualistic explanations” about the factors directly involved in people’s social advancement (PNUD, 2017:241), and in particular poverty. In fact, while in 1996, 18% of the population agreed with the idea that ‘laziness and lack of initiative’ were the main factors explaining poverty in Chile, by 2015 this percentage had risen to 40% (PNUD, 2017:243). Interestingly enough, when asked about if poverty was determined by a lack of labour opportunities, in 1996, 23% of people agreed, but this percentage dropped to only 4% in 2015 (PNUD, 2017:243). Such trends demonstrate the ‘deepening of individualism’ in Chile as a result of the expansion of the ideal of individual merit encouraged by 1980s’ neo-liberal reforms, along with its emphasis and trust on both personal ambition and individual efforts (Araujo and Martuccelli, 2012:62). In this sense, what can be found in Chile today is an individualistic “repertory” of meritocracy that – as its main trust is on social mobility through individual efforts and hard work, something that also applies for people living in poverty – explains a lack of progress as a result of people’s insufficient efforts and laziness (PNUD, 2017:245). Overall, this individualistic and stigmatising repertory of meritocracy ends up demeriting those occupying lower social positions, particularly “the welfare poor” as this group is “given things” without having ‘the credential of effort’ (Frei, 2016:10).

From the above discussion, it is possible to identify the ambivalent character of individual merit or people’s deservedness in societies like Chile, and its negative impacts on social cohesion, in particular on the status of the poor and welfare beneficiaries in contemporary societies. While merit can be regarded as a principle of social justice through which it is possible to legitimate processes of social distribution, it also contributes significantly to the tolerance of inequality, particularly by stigmatising and demeriting vulnerable groups (PNUD, 2017:241). This meritocratic ideal carries a high risk of stigmatisation, which has historically worked as a strong cultural and moral barrier for “the poor” to feel fully entitled to welfare support under liberal, and now neo-liberal, capitalist societies. Following Honneth, even though the institutionalisation of social rights in capitalist societies emerged to secure a minimum of social esteem for individuals independent from their achievements, social esteem has always been dependent on the evaluation of people’s achievements and contributions to society, particularly as ‘productive citizens’ (Honneth, 2003:141). Nevertheless, as argued by Honneth, struggles for recognition concern, and take place, around cultural interpretations about people’s needs, claims and abilities (Honneth, 2003:158), the latter associated with the achievements and contributions that make a person deserving or not of social recognition. In

line with these struggles is, as analysed above, the under-appreciation of women's contributions, and the way in which such misrecognition has been institutionalised in the sphere of welfare and social citizenship relegating women to second-class citizen status. This misrecognition seems to be highly pressing for people in poverty as what seems to be at stake about "the poor" under cultural interpretations based on individual merit and economic independence, is their apparent lack of achievements or contributions. Under these cultural conditions, it is not difficult to understand why perhaps "the welfare poor" in Chile show a high level of compliance with the individualistic repertory of meritocracy widespread in the country, and in particular in the welfare field. Overall, it constitutes the predominant normative framework defining citizens' social esteem in and outside the welfare field, shaping, in turn, people's expectations of social recognition, even among the "the poor".

3. Welfare, Maldistribution and Misrecognition

In the light of the above discussion, it is clear how difficult it is for people living in poverty to keep or secure a minimum of social esteem considering their weak positions in the labour market that do not allow them to secure by themselves a decent standard of living, to which in the case of poor women is added an under-appreciation of their reproductive work. Such precarious conditions to a high extent are not significantly altered by selection in welfare programmes; selection that in turn carries the risk of stigma and demerit since being part of welfare programmes has traditionally constituted a sign of individual failure, of people missing achievements and contributions. In the case of people living in poverty, such individual failures refer mostly to that primary achievement of being able to look after themselves independently, something that under the individualising and responsabilising discourses circulating in Chilean society since the 1980s' "neo-liberal transformation" is highly valued. Nevertheless, this situation is not exclusive of today's "neo-liberalism" but rather a much longer trend if we consider how, under liberal-capitalist societies, the capacity to be self-sufficient and economically independent constituted one of the fundamental conditions to be recognised as a citizen. In the light of this, and as analysed at the beginning of this chapter, individual independence has once again been given dominance under current liberalising and privatising welfare reforms, re-enacting, in turn, its traditional opposite – dependence, and in particular welfare dependence. Under this current emphasis on individual independence, particularly on economic independence as the basis of social esteem, it seems to be difficult for welfare beneficiaries to feel fully entitled to welfare support because it runs the high risk of

misrecognition – namely, of not being acknowledged in their capacities to contribute to society like any other citizen:

'I do not know if this [selection in the "Families Programme"] is a right. I believe it is a benefit (...) because why would [welfare institutions] have an obligation to give you [something] if everyone goes to work, everyone generates money (...)? In the end, you can do things and fight like everyone else (...) There are many people who say "they have to help me, they have to give me help because I am in need" (...). Some time ago, I was watching the news, and there was a woman whose house fell and she said: "the government has to give me a house". Unfortunately, her house fell. Then, they are expected to help her. But I think that that person has to go with humility, as I went many times and I "bounced", as it is said, but I came back and said, "this is it, I will rise anyhow".'

(Adult Woman, 42, Families Programme)

'... No, I do not see this [selection in the "Families Programme"] as a right. There are people who can work. It is not a right, it has to be earned (...). There are people who can do things, they can work. My neighbour has arthritis, and she taught us how to make these paintings, and she goes out to sell them. So, I say: "if she can with her sickness", you know what I mean, why does it have to be a right that they have to be given [something]. If people can work. People do not work because they are lazy. Because they can work in the house...'

(Adult Woman, 47, Families Programme)

As can be seen from these beneficiaries' accounts, by refusing to identify their participation in anti-poverty programmes and the receipt of other benefits as their right, these women were able to keep their respectability as they assert their capacity to work and provide for themselves "as anyone else". In fact, this respectability can be kept in any circumstance, as demonstrated by the exemplary case of the woman with arthritis who nevertheless made some craft-paintings that she sold around her neighbourhood; she also taught the other women so she could work from home. Further, respectability was described as important to keep at any cost, as illustrated by the case of the woman who "unfortunately" lost her house but without much "humility" claimed the government should give her a new house. These high standards of respectability among groups living in poverty have become perhaps more pressing under the current liberal welfare regime with its strong emphasis on individual merits and efforts. In the case of younger generations of welfare beneficiaries, as discussed above, this is delicately balanced by taking their participation in anti-poverty programmes as a privileged opportunity

where they can provide evidence of their individual merits, which can allow them to keep and protect a sense of respectability:

[Talking about her experience of participation in the “Families Programme”, including her participation in one FOSIS entrepreneurship programme]

‘... You have to show interest because if it were all free of charge... Because for example, in FOSIS, in the “Support to Your Labour Plan” [entrepreneurship programme], I do not remember really how much money it was. Maybe it was about 300,000 pesos (US\$450) [that the program provided to develop beneficiaries’ entrepreneurship projects] but you had to add a percentage. It’s okay, it’s normal because you have to make some effort. They [welfare institutions] cannot give you everything.’

(Adult Woman, 42, Families Programme)

Nevertheless, the situation seems to be more difficult for older generations who developed their life trajectories prior to the contemporary expansion of social assistance policies in the country. In fact, here we can identify a respectability that, as discussed in detail in Chapter V, was determined by people’s dispositions to work hard and to deal independently with the burdens of social reproduction, as was the case of several older women, lone-mothers with large families who did not have access to systematic welfare support. In this sense, older generations seemed to hold a traditional view of “the respectable poor” associated with a “culture of decency” under which the possibilities to dignify poverty were determined by people’s ‘adequacy to the norm’, and in particular by their social integration through work (FPS, 2010:114) but not through welfare. In this sense, “the decent poor” were “the working poor”, who even though they had limited chances of formal labour inclusion were able to develop independent and informal productive activities that allowed them to provide for themselves and their families. The working poor in the case of poor women also included being a “hardworking mother”, a sacrificial identity that constituted another gender-specific parameter of respectability among these groups.

Taking all the above elements into account, it is possible to identify the existence of different versions of “the respectable poor” in Chile constituting the moral referents from which welfare beneficiaries legitimate or not the current processes of distribution and reception of welfare benefits. In fact, what was found by this research is the relevance that the protection of respectability has for people living in conditions of poverty and targeted by social assistance policies that always have possible stigmatising effects. In this sense, the high relevance given by welfare beneficiaries to the protection of their respectability seemed to constitute one of the

most critical factors impeding people's ability to feel fully entitled to welfare support or to claim for it. This was particularly true for people from older generations who saw how younger generations do not like to work but rather want to be given everything from the state:

Interviewee: '... there are people from the second and third stage [of the social housing project where she lives] who have never paid for common expenses, and we do in the first stage. We, who are poorer people!'

Interviewer: 'And why are these people like that?'

Interviewee: 'Because they want everything to be given to them. Everything given free of charge.'

(Older Woman, 81, Bonds Programme)

'They [younger generations living in shantytowns] do not want to work. And also, when they are given their social houses, it is seen that people are not used to paying water or electricity [bills] (...). They demand to be given a lot, then they get used to being given everything from the government without helping in anything.'

(Older Woman, 73, Bonds Programme)

From the perspective of these older adults, what they described as problematic was the lack of deservedness showed by certain welfare beneficiaries either because they were not so poor to be entitled to certain benefits (e.g. to be exempt from paying social housing's common expenses) or they did not contribute to improving their living conditions (i.e. people living in shantytowns). This lack of deservedness, beyond these specific cases, seemed to be mainly explained by people's expectations and dispositions to be given things by the state, free of charge. Such expectations or dispositions in the light of the hardworking trajectories of older people without much access to welfare support appeared as something questionable and unjustified, being judged by some of them as mere laziness:

'I consider that in poverty there are many people who are lazy. They do not like to work. They like to be given things. You see that a lot. A lot of abuse, a lot! Because it turns out that the person who wants to work, works in whatever thing.'

(Older Man, 77, Bonds Programme)

'... that people start having children for the government to feed them is an extreme laziness.'

(Older Woman, 67, Bonds Programme)

In this sense, from the perspective of older generations, it is sometimes people's laziness that leads them to require welfare assistance because the real issue is that these people do not like to work. As such, if they are not so poor as they claim to be, they are "abusers" as they could be working but prefer not to do so because they like to be given things. Underserving welfare beneficiaries, as we can expect, make it more difficult for people, particularly for those from older generations, to assert the right to welfare support of "the poor" as there are people who fake their living conditions in order to receive social benefits due to their dispositions to receive things free of charge rather than working hard to make a living on their own. This delicate process of social differentiation among welfare beneficiaries is highly influenced by a person's generation, considering both the way in which people have interacted with the welfare field through their life trajectories and the conditions under which such interactions have developed. In this sense, people's attitudes and perceptions about social assistance programmes and benefits are not only determined by the current structure of the "welfare field" and the distinctive "welfare habitus" among welfare beneficiaries (Peillon, 1998), but also by beneficiaries' "generational habitus" that shapes their perceptions of and attitudes about welfare benefits and entitlements as a result of the conditions of socialisation under which different generations developed (Moffatt and Higgs, 2007). In the light of these considerations, it is understandable that older adults question the dispositions of younger beneficiaries to rely on social assistance benefits, especially since such "alternatives" were quite limited during older adults' life trajectories as a result of the under-development of social assistance, and even where it did exist subjected beneficiaries to high levels of discretionary treatment by welfare officers. For this generation, then, to rely on welfare support to satisfy part of their needs was an option neither viable nor legitimate.

Hence, under the contemporary expansion of social assistance in the country, the option that lower income groups have to rely more or less on welfare to deal with part of their needs has become more viable than it was for their counterparts from previous generations. In addition, it would seem that such options have become relatively more legitimate for people living in poverty today, even though such legitimacy depends heavily on the way in which people perform as welfare beneficiaries as they need to show a disposition to take advantage of the opportunities opened through the selection and participation in anti-poverty programmes. This seems to be the "generational habitus" emerging among current generations of welfare beneficiaries in Chile as a result of the conditions under which they have socialised in the welfare field, and through their accumulated experience of participation in anti-poverty programmes and the knowledge gained by such experiences. Therefore, in accordance with

the dispositions of younger generations of welfare beneficiaries, what seems to be questionable is not that people rely more or less on welfare benefits but rather that people who are not in real need or who fake their socio-economic situation are able to access benefits while others who are genuinely in real need are not entitled to them:

'There are many families that play and lie a lot to receive more [welfare benefits], because where I lived before, there were people who were part of the [Families] programme who lived in huge two-storey houses with ceramic floors, "huge houses". But they [welfare officials] never visited me [to apply the social protection file (previous targeting mechanism)], and I saw that difference...'

(Adult Woman, 28, Families Programme)

'... I always say: "As long as it [welfare programmes and benefits] is for people who need, I find it is good." But when there are people who do not need, I find that is an injustice. It bothers me that they victimise themselves and say: "I do not have anything." But they have a car, and they are given [solidarity] pensions. Here you see everything. There are people who have two cars and have pensions, those that the government gives, with two cars? And my mother is still waiting for a pension, is it unfair or not?'

(Adult Woman, 47, Families Programme)

Here we come back to the topic of needs since what makes the above situations questionable is the provision of welfare benefits to people who are not in socio-economic need as demonstrated by their current living standards. Under these conditions, the granting of welfare entitlements lacks legitimacy producing, as can be appreciated from the above beneficiaries' accounts, intense feelings of injustice among people due to the perception of unfair differences in the distribution of welfare benefits. To some extent, what is critical here is the determination and identification of those who are "the needy" or "the poor" through the mechanisms of targeting and selection in use in the country, which is a highly sensitive and consequential matter. Even though fundamental for the operation of welfare programmes as well as to distribute benefits to those who really need them, welfare targeting "the poor" or "the vulnerable" always carries the risk of "stigmatisation", producing feelings of "embarrassment" and uneasiness on those categorised as such:

Interviewee: 'I think [welfare programmes] are great because they change people's lives.

Though the issue of "poor people", "the poor", I don't think is right, but it helps.'

Interviewer: 'Why?'

Interviewee: 'Because if they [people] were not called "poor", these programmes would not exist. They [politicians] would not worry about people who have less resources (...) I have known cases of people who applied for the Bridge [Programme], that participated a long time ago and that now have their "little shops", bakeries or greengrocers. Then, you see the changes they [welfare programmes] have made. They are good. But I believe that this idea, "you belong here [to welfare programmes] because you are poor", is stigmatised...'

(Adult Woman, 26, Families Programme)

'Once they [welfare officers] called me and gave me a bunk for the children because we were from the 30%, the 40% most vulnerable in the country. And what does it mean? That we are entitled to benefits, and that they will help us and so on. I said "spectacular" but it embarrassed me because I said, "I've never asked for anything". And when I asked, it was for the [application to the] "President's scholarship" because my daughter deserved it because she had excellent grades. I worked, I cleaned [houses]. My husband worked. Then, I considered that I was a hardworking woman. My husband a hardworking person. My daughter tried hard and had good grades. So, I applied [for the scholarship] but nothing happened.'

(Adult Woman, 44, Families Programme)

Even though "necessary", being identified as "poor" or among those "most vulnerable" heavily threatens people's sense of social worth and respectability as people are very aware of the stigmatising effects associated with poverty, and in particular with "the welfare poor": those participating in social programmes and always asking for things to be given to them. This awareness, as illustrated in the above accounts, leads people to stress "the merits of the poor" related with their participation in anti-poverty programmes, and their subsequent transformation to "independent-productive citizens". Yet, such merits are not always recognised in the welfare field, as we can see in the case of the "hardworking" family that "deserved" to receive a scholarship from the government in the light of the good educational performance of one of her children whose application was nevertheless rejected. In this sense, even though poverty refers to a situation of socio-economic necessity or "less resources", welfare beneficiaries struggle to justify their entitlements by emphasising their individual and family merits – merits that are in direct connection with the values guiding current social policies emphasising individual merits and efforts, which in turn allow people to dignify their experience of being "the targets" of anti-poverty programmes.

Nevertheless, the problem here is when beneficiaries' agreement and compliance with this set of values concerning individual and family merits does not guarantee a fair distribution of welfare benefits as some "undeserving beneficiaries" who are not "truly needy" receive benefits, while other groups of "the deserving poor" find themselves not entitled to welfare support – in short, when the values and the rules of the game in the welfare field do not exactly match. As such, when social policy outcomes or the distribution of welfare benefits is perceived as unfair by people, this can significantly erode the apparent legitimacy enjoyed by the meritocratic ideal among lower income groups in Chile. Of relevance here is how the processes of targeting and their outcomes can end up contradicting the principle of merit either by not recognising people's merits and efforts to improve their living conditions or because they do not consider people's living conditions and pressing needs, as exemplified in the following beneficiaries' accounts:

'... if you own a house you are no longer poor. We as a family generate the necessary income. It's enough. (...) But we have such an expensive standard of living because we have two children with illnesses and it is not enough for us (...). I have now almost 15,000 points [in the social protection file (previous targeting method)] when before I had 3,000! (...) and it is only because I was given my own [social] house (...). My children have the same problems, we have the same situation, but just because you own a house you are upgraded [in the social protection file]. I find it's a shame because if you are going to talk about poverty, we are still poor. So, saying that you left poverty, and raising [your score in] the survey so that the situation is over, is a lie. People's lives do not change.'

(Adult Woman, 26, Families Programme)

'... now they [welfare institutions] grant subsidies to poor people [so that they can apply to social] housing. But who can apply with 700,000 pesos?! [US\$1,000 approx. which corresponds to the mandatory amount of savings required for applying to the social housing subsidy] (...). In my case, I have 350,000 pesos [US\$500 approx.] that my husband earns. But that's what I have to eat. I have to pay the school. We have to pay bills, and sometimes you cannot afford to pay electricity, water or who knows. So, it happens that if I want to apply for a subsidy, I cannot because, on top of that, you are going to register for it, and they say to you at SERVIU [housing and urbanisation service] that you have three months to collect the 700,000 pesos (...). Then, they tell you: "it is a right of all Chileans [to have] a subsidy" but you cannot use it because how do you get the 700,000 pesos?'

(Adult Woman, 42, Families Programme)

Interesting to observe here is how these experiences of misrecognition suffered by welfare beneficiaries were related to one social policy area that was particularly influenced by the liberalising welfare reforms of the 1980s, that of social housing. In fact, current housing policies operate with the principle of “subsidiarity” through which public social housing development is residual, offering subsidies to lower income groups to buy social houses but in complementarity with “family savings”. Under the current logic of social policies, these savings would seek to encourage ‘the will, perseverance, and individual work’ of welfare beneficiaries (Arteaga and Iñigo, 2015:222) or in other words, the habitus of merit and effort identified above. The critical point here, as illustrated in the above beneficiaries’ accounts, is how the logic of merit seems to end up working as an end in itself, disconnected from the permanent needs that a family with two children with severe illnesses have to meet constantly, independent of the fact that now they are in better socio-economic conditions after applying to social housing and now owning their own house. Such material advancement through a family’s efforts, rather than being properly recognised by the mechanisms of targeting in use in the welfare field, constitute, paradoxically, a source of punishment as people find their welfare scores raised because of their progress, which disadvantages them in their intentions to apply to other welfare benefits or programmes. Unfair treatment can also occur before the application to housing subsidies as a result of the high amount of “family savings” required to be granted these subsidies. As evident in previous accounts, this discourages people and produces anger since housing subsidies under the current liberal-residual welfare regime of the country are supposed to be “a right” of every Chilean citizen but whose use, however, is strongly determined by people’s income capacity. This severely threatens “the meritocratic promise” in Chile because rather than individual merits sensitive to people’s socio-economic conditions and needs, what predominates in matters of social policy and rights are the mechanisms and the rules associated with the process of targeting whose criteria seems to be not representative of people’s living conditions as well as of their struggles and efforts to improve their living standards.

In this sense, what is problematic about the mechanisms of targeting is not only the fact that they define who are “the poor” or “the needy” but also the level of need, something that in turn determines the resources to be spent on these populations. These definitions and determinations, of course, are of high importance for both the operation of social policies and the distribution of welfare benefits. However, under the residual orientation of the Chilean welfare regime, targeting has produced a series of concerns among scholars as it has ended up reducing poverty to a technical problem – namely, a problem of ‘measurement and

identification' to distribute welfare benefits (Vargas and Socías, 2016:192). In fact, as a result of this technical and abstract approach towards poverty, it has been observed that under the 'discrete' nature of the methods through which poverty is measured in the country, 'abrupt' divisions have been introduced among population groups sharing relatively similar living conditions that have been placed in positions higher or lower on the poverty line (Larrañaga, 2007:21). Indeed, as analysed in Chapter I, even though the country has introduced a multidimensional measurement of poverty focused on assessing population's wellbeing conditions, in terms of targeting the poverty-line method still predominates as corroborated by the two anti-poverty programmes selected as case studies for this research. Even though upgraded in recent years, this method still concentrates on basic or survival needs, and then on identifying the section of the population in conditions of extreme poverty, a group that since the first safety-net developed in Chile during the 1980s has constituted the priority group of Chilean social policies.

Overall, the introduction of means-tested instruments to identify and select the target groups of social policy constituted one of the emblematic "symbols" of the change in the role of the state in Chile, which since then has assumed a "subsidiary role" through which any redistributive measure target the poorer population (Larrañaga et al., 2014). Nevertheless, in the light of beneficiaries' accounts, what is critical for those living in poverty is the parameters under which such "redistributive" action operates. This is because in the end, the scope of the actions that the state can develop in matters of poverty is mostly determined by the classificatory practices associated with targeting that define those sections of the lower-income population of the country who are "entitled" or not to welfare support. In reality, this is a matter of "scores", and is lived as such by welfare beneficiaries, as found in this research and also by Ceballos in the case of women-beneficiaries from the previous "Chile Solidario" system. These scores encapsulate who will be recognised as the "welfare" poor or not, which of course, as also found in this research, does not necessarily coincide with 'the experiential definitions' of those living under conditions of deprivation, raising a series of concerns in matters of social justice (Ceballos, 2015:174).

As illustrated by beneficiaries' accounts, what seems to be critical for people expecting to receive welfare support is the way in which the methods of selection and targeting currently in use in the country do not take account of their living conditions, the costs of social reproduction, and their struggles and progress to make ends meet. This is particularly salient for poor women, who are the primary users of welfare programmes and benefits, as they are, in most

of the cases, the ones in charge of managing the scarce resources available to deal with their household's needs either from their husband's work or from welfare. Such first-hand knowledge of the difficulties associated with the satisfaction of everyday needs ends up challenging the abstract and individualistic meritocratic norms predominating in Chile and the welfare field since it re-introduces one of the main factors impeding people's ability to "get ahead" – that is, their precarious social positions and lack of socio-economic resources. These structural factors not only contribute to reducing the legitimacy of the meritocratic promise in Chile but also help to justify people's critiques and claims about their current welfare entitlements. This points to the inadequacy of social assistance and welfare benefits provided to "the poor" in the light of beneficiaries' living conditions and pressing needs, as illustrated by the claims of both "old" and "new" generations of welfare beneficiaries:

Interviewer: 'What do you think about your [welfare] transfers? About the amount, and the offer?'

Interviewee: 'Well... one cannot ask more to be given from the municipality, [it is] "what it is", "there is no more". It would be great if they could provide something for the most vulnerable families. Maybe once a year to receive a food basket, some meat, [because] of the low wages [prevailing in the country] ...'

(Adult Woman, 42, Families Programme)

'... if they ["Families Programme"] had told me: "we are going to give you this benefit where you are going to have a job", it would have been different [because] I would have contributed to society later. But the benefit ended, and it was what it was (...). I think they should focus on [that among] those families helped, at least one would remain working. For what? So that little bit of money that once arrived could last for longer.'

(Adult Woman, 44, Families Programme)

'It [solidarity pension] is a right but (...) the pension has increased very little. [it would be good to have] a good enough pension because tell me: who lives with that money?'

(Older Woman, 69, Bonds Programme)

'... this is what I say, that money [solidarity pension] is a great help from the government, that subsidy, but it's not enough (...). The money all goes to the rent.'

(Older Man, 77, Bonds Programme)

From these perspectives and experiences of welfare beneficiaries, we can distinguish the implications associated with the low standard of today's offering of social assistance and welfare support in the country in terms of social distribution. This low standard translates in monetary transfers whose significance to families' income is so minimal that people would prefer to receive in-kind transfers such as "food baskets" or "meat". The temporal character of the benefits provided by social assistance programmes to families also has scarce impact in terms of guaranteeing labour inclusion. Finally, even one of the most substantial monetary transfers available in the country, social pensions, though gender sensitive in design and significant in terms of population coverage, still leave "older-poor" in precarious living conditions. All these issues have, at different points in this research, been analysed in much detail but here they point to one of the most critical shortcomings of social assistance policies under the residual welfare regime in place in the country – namely, its minimal decommodifying impact. Even though today "the poor" in Chile find themselves more or less entitled to social assistance policies, such entitlement in any case is barely enough to cover people's current needs or to bring more socio-economic stability since such policies are not able to substantially improve neither households' income nor the pensions of "the poor". In fact, notwithstanding the significance that entrepreneurship projects and social pensions have for people living in poverty as demonstrated in this research, current anti-poverty social policies in Chile do not substantially change the social positions of "the poor" as determined mainly by their precarious labour inclusion or market situation.

In the light of the above considerations, what can be observed here is how some sectors of "the poor" now form part of a distinctive social category – that of "the welfare poor" – a status that implies dependency as people require welfare support to satisfy their needs because, due to their low resources and precarious labour conditions, they are not able to provide for themselves. However, this welfare inclusion and support is never enough to modify people's everyday socio-economic constraints. As such, what is currently being delivered to "the poor" in Chile are no more than "poor benefits", which institutionalise the disadvantaged social position and status of this population group. This adds to the stigmatising implications associated with participation in anti-poverty programmes, as demonstrated by beneficiaries' awareness and certainty about both the poor quality of their entitlements and the reasons for this:

'I believe that in the end, it [welfare programmes and benefits] is only to mark the issue. It is like they mark you: "you are here", "you are there", and then, they give you a little (...). It's great because it keeps you [where you are], and you get used to that. But it's not that you're going to get ahead, and that you're going to be perfectly well, it's not like that.'

(Adult Woman, 44, Families Programme)

'I don't think politicians are interested in this [welfare programmes]. They are the ones who make these programmes. They do not care. I believe that they feel "good" because these programmes exist, and [say:] "It is enough, (...) we have this programme, and this number of people are in it. We cannot do more.'"

(Adult Woman, 26, Families Programme)

What these beneficiaries' accounts suggest is a perception of political and institutional disdain, indifference and lack of interest for what is given to the poor, and therefore for the real possibility of social advancement of welfare beneficiaries. In this sense, what social policies do is merely "mark" people, or in other words, identify "the poor" from the rest of the population in order to give them "a little bit" of welfare benefits to keep people in their current social positions. In this sense, the goal behind these programmes is not that people get ahead but rather that they remain in their precarious socio-economic status by avoiding the risk of falling even more. Such reproductive logic seems to be explained by the kind of "political will" behind the current welfare policies in Chile characterised by "indifference" and "lack of interest" for really improving the welfare support available for the poor. Therefore, and perhaps paradoxically, what this research found was that after 18 years of systematic development of social assistance policies specially targeted on the poor in Chile, from the perspective of some welfare beneficiaries – the section of "the poor" targeted by current anti-poverty policies – what the offer in place expresses to them is a lack of real concern for their life prospects. This has to do not only with the "quantity" of welfare benefits available for lower income groups in the country but also with the "quality" of people's current entitlements:

Interviewee: 'It [welfare provision for the poor] does not interest them [politicians] because in fact, I ask my children to eat lunch at school. They have the benefit of having lunch and breakfast at school, and I ask them [to use them] because I do not know if when they arrive I will have something to give them. One lives on a day-to-day basis (...) [But] they say to me: "today school-lunch were beans, and they were very disgusting" because as they are given frozen meals, the beans come with an icy layer (...). Then, they prefer not to eat [at school] (...). It does not matter that there is nothing to eat as they eat bread. Then, there you realise how they can give children such meals at schools!'

Interviewer: 'Do you see there a disregard?'

Interviewee: 'Totally, from the government (...) because there are a lot of frozen things in the schools (...). It is not that they are washing vegetables, and that there are fresh things for the children, no. It is all frozen what is given to children at school.'

Interviewer: 'And why do you think they do it that way?'

Interviewee: 'Because it lowers costs.'

(Adult Woman, 42, Families Programme)

Interviewer: 'Where else can you see that there is poverty in Chile or inequality?'

Interviewee: 'I find that around the city (...) because we [people living around the city] are always like very abandoned (...). For example, these populations [social housing projects], are always built at the end [of the city] where there is nothing more (...).'

Interviewer: 'And why do you think it happens that way? That they are built so far from the [city] centre?'

Interviewee: 'Because one [those living in the social houses] has less economic contribution. One applies [to social housing projects] with less money (...).'

Interviewer: 'And (...) what do you think Chile is missing to improve these issues?'

Interviewee: 'I think more justice (...). That they [politicians] do not arrive and throw poverty away, like "we are going to make houses, a lot of flats but far, far from the [city] centre", like isolating them [poor people].'

(Older Woman, 69, Bonds Programme)

At issue in these cases was the poor quality of people's entitlements, which was viewed as expressing the lack of interest in and consideration for "the poor" in Chilean society. This was experienced as a moral grievance by welfare beneficiaries whose benefits were supposed to help them either by the provision of school meals or social housing projects but which ended up disappointing people's expectations since these welfare benefits did not meet people's standards about what constitutes a good and decent entitlement. In this case, the problem was not so much about how many benefits are available for "the poor" but how good these welfare benefits are, which is an issue of quality. The poor quality, as expressed in the above beneficiaries' accounts, was explained by the few resources spent on welfare services whose target group is "the poor". In fact, this is why children from poor families are given frozen food rather than fresh and hand-made meals in public schools; and why social housing projects are built at the end of the city, the periphery of the city of Valparaíso in which this research was carried out. The problem here, however, is not only the fact that social assistance involves considerably lower cost in comparison with universal social services, which to some extent could explain the limited benefits provided for "the poor", but also that welfare beneficiaries'

feel sure about the poor quality of their entitlements because they have the real chance to compare the quality of the services to which they can access, with the quality of those of people who can pay for better services in the private market:

'... municipal public education is bad (...). We live with my husband's son (...). He is enrolled in a public school that is terrible! They [students] pass with bad grades but they are passed anyway because what matters is the state's subsidy (...). The children do not go to school but they [appear] as present because what matters is money. Because they [schools] are paid [per student] per capita [as well as for children's school attendance], that is what interests them (...). Then, in the end, your children finishes the eighth grade [primary school] knowing nothing, just because the school sought to earn money. But that does not happen in private [schools]. That's the difference that bothers me.'

(Adult Woman, 26, Families Programme)

'... since I knew I had this disease [cancer] I have been waiting for two years [to receive health treatment]. It's dreadful. I do not know until when [I will have to wait]! Since then I have felt what public health is (...). [T]hey [doctors] always tell me that I'm on the waiting list, that I have to wait because there are, I do not know how many people also waiting. Wait... I think that's the bad thing when you're poor, that's the saddest side. Because if you were rich, you could heal in the private health (...). Money immediately solves everything. Instead, the poor have to wait.'

(Adult Woman, 44, Families Programme)

'... why a person that is humble cannot be treated in a [private] clinic if she is as human-being as the other who has money (...). Maybe, in my case, [if] I get sick now, I will have to go to the [public] health centre, and wait for two, three months for a health derivation. On the other hand, if I had money, I buy the voucher, I go to the clinic, and they treat me immediately. So, I'd have a much more advanced quality of life if I had money. But if you do not have money, what can you expect? To die, nothing more...'

(Adult Woman, 38, Families Programme)

These experiences express a clear consciousness about the differences that exist between the quality of the services available for “the poor”, and for lower-income groups in general, and the quality of private services that some people can afford to buy in the market. Hence, it is “money” that determines the quality of education received by children in public schools and their future outcomes, as well as the waiting times in public health centres notwithstanding the

seriousness of people's illnesses. Such differences based on the income capacity of people severely questions the fundamental equality that all citizens as human beings are supposed to have. This is the fundamental misrecognition happening in Chilean society under the residual or subsidiary orientation of its welfare model, which certainly is more critical for "the poor" who are already vulnerable to the discriminatory and stigmatising effects associated with participation in current social assistance programmes. In this sense, and notwithstanding that after the analysis developed in this chapter we can be clear about the shortcomings of social assistance policies in terms of quantity and quality, one of the critical issues in Chile is that social assistance constitutes an integral part of the liberal welfare regime in place in the country whose most salient feature is the existence of dual welfare channels that provide different quality services in accordance with the income capacity of different socio-economic groups. This dualism, as we can expect, has contributed significantly to undermine the real and symbolic value of public services, which along welfare programmes have come to be seen as "residual" channels for people who cannot pay for better services in the market. This is how the welfare regime with its different "channels" has become a critical space of social differentiation in Chilean society as its organisation, provision and access is determined by people's class positions – a welfare differentiation that perhaps would not be so problematic if public and private services, including social assistance, were able to meet some basic quality standards, reassuring people that independent of their class they are entitled to good-quality services as everybody else. However, as analysed throughout this chapter, this is not the case in Chile since public services, and in particular welfare programmes, are characterised by problems of quality, something that in the case of "the poor" has come to institutionalise their lower social status in society. This reproduction of class inequalities through the stratified welfare citizenship existing in Chile, even though constituting a fundamental problem of social redistribution, has crucial implications regarding the social recognition or misrecognition of citizen's equal social worth. This is particularly critical for those occupying the lower positions in Chilean society, and who are identified as "the welfare poor".

Conclusion

The purpose of this third empirical chapter was to analyse to what extent beneficiaries regard their participation in social assistance programmes, along with the receipt of welfare benefits, as their right. And also, to what extent they see themselves entitled to claim for welfare support. Consequently, it was identified that almost half of the beneficiaries regarded their welfare benefits as their right but based on more or less conditional conceptions of social contributions

related with productive work, motherhood, social security and taxes. On the other hand, it was identified that among the 14 welfare beneficiaries that did not regard their welfare benefits as their right, their answers were heavily determined by the technical and intricate methods of selection and targeting currently in use in the country. Under these conditions, welfare beneficiaries viewed selection in anti-poverty programmes as an issue of luck or good fortune, and as an exceptional instance in which they had to take advantage of the privileged opportunities as a result of welfare selection. This is the welfare contract encouraged by the current orientation of anti-poverty social policies in Chile, emphasising the agency and capabilities of poor groups, which has re-enacted a reference to “deservedness” focused on beneficiaries’ merits and abilities to become active beneficiaries. This relatively new welfare habitus has allowed younger generations of welfare beneficiaries to justify the use of welfare, allowing them to keep their respectability and differentiating from those who waste their opportunities or misuse their welfare benefits. Nevertheless, as the distribution of welfare benefits does not always follow the logic of merits or the proper consideration of people’s needs, welfare selection can produce a series of social justice concerns among beneficiaries, particularly when they find themselves disadvantaged by the mechanisms of targeting and selection, or when they see other underserving people entitled to welfare support. These critical issues open the door to questions regarding the poor quality of the entitlements provided to “the poor” under the current residual welfare regime, which includes not only social assistance benefits and programmes but also, and critically, the wider offer of state social services delivered by public health and educational services. It is under this whole welfare architecture characterised by residual welfare support for “the poor” through social assistance benefits that are very low in scope, along with dual channels of social protection characterised by differences of quality between private and public services, that the low status of the poor becomes institutionalised and reproduced by social policy. Such conditions negate the recognition of the “the poor” as subjects of rights, despite the significant expansion of social assistance. Overall, recognition is not necessarily an issue of quantity or coverage but rather an issue of quality since the access to and granting of social services and welfare entitlements must express respect for people’s particular needs and diverse social contributions in accordance with the ideal of acknowledging citizens’ equal social worth.

CHAPTER VII

Social Assistance, Empowerment and Misrecognition

Introduction

The purpose of this last empirical chapter is to look at the type of “welfare citizenship” being developed and experienced among beneficiaries of social assistance policies in Chile from the perspective of those directly involved in the institutions and programmes in charge of implementing the current offer of social assistance policies at the local level – that is, welfare professionals. In doing this, it explores the citizenship implications of the recent welfare inclusion of “the poor” from the perspective of social recognition through the analysis of the experiences of those directly working with the “welfare poor” under the logics, rules and conditions imposed by the current liberal or “subsidiary” welfare regime prevailing in the country. As a result, this final chapter examines in detail the quality of the process of welfare inclusion of poor groups developed in Chile during the last decades by looking at the conditions of inclusion and institutional treatment received by welfare beneficiaries when making use of and claiming their entitlements. This exploration is particularly relevant considering how the recent welfare inclusion of groups living in Chile has involved not only an expansion of social assistance policies but also the adoption of rights-based social protection policies with the aim of providing minimal guarantees of social inclusion and protection to citizens, particularly to those living in poverty. In the light of this, it is worth asking to what extent the institutional conditions and treatment associated with the organisation and implementation of social assistance policies in Chile have contributed to the recognition of “the poor” as subjects of rights.

1. Rights-Based Social Protection in Chile, and Empowerment among the “Welfare Poor”

This section looks at what the professionals directly involved in the local implementation of the system of social protection of the country and its different offers of social assistance programmes, think about this social policy development. In particular, it explores what they think about the rights-based approach behind the recent expansion of social protection policies in Chile, and the possible impacts that this citizenship orientation is having among people in poverty making use of welfare. In this regard, the research found a positive evaluation by professionals that highlights the ‘*vast and diverse offer*’ developed during the last decades,

along with the ‘*discourse of rights*’ that have gone hand in hand with the evolution of the social agenda of the country since the return to democracy. This discourse, even though ‘*still in diapers*’ (not fully translated into practice), seems to have contributed to the “empowerment” of “the poor”, particularly since the first administration of Michelle Bachelet (2006–2010) because of its emphasis on rights-based social protection:

‘... an issue that one can also visualise during this period (...) is the change in the discourse of families. Because families no longer come to ask for help but to claim for their rights. This has to do a little with the discourse of Bachelet’s first period where this was a system [of social protection] that guarantees rights. Then, the single-family allowance was not a subsidy, was not an aid: it was a right. Then, that empowered families [as they began to claim for their rights...’

(Anthropologist, Head of the Social Unit Manager, Ministry of Social Development, region of Valparaíso)

It is interesting to note that this “empowerment of the poor” seems to be a particular feature of ‘*the poor of today*’, who rather than asking for favours from a subordinating subject’s position, approach public services and professionals knowing about and claiming for their rights:

‘The poor of today are more empowered, more informed (...). They have a major capacity for dialogue, and are more threatening if they want to be (...). “It is my right” [they say], then, they don’t come saying “miss”, as the old woman did, “miss, I’d like to know if you could see me because I’ve come so many times...”. I don’t see that [kind of] woman anymore (...) Because they [people in poverty] are more informed, more empowered, because they understand rights...’

(Social Worker, Head of the Department of Social Development and Promotion, Municipality of Valparaíso)

It is relevant to consider here how under the legislation through which the “Subsystem of Securities and Opportunities” was established, which encompasses the current anti-poverty programmes of the country, welfare beneficiaries are regarded as “users” of the subsystem (Law n° 20595). As such, they do not only have the right to access several benefits associated with their inclusion in the subsystem’s anti-poverty programmes but also have a series of conditions and requirements they must meet in order to keep their entitlements (BCN, 2012: Law n° 20595). In the light of this, the empowered attitude observed among younger generations of people in poverty might be related with people’s own identification as “users”, and the certainty with which they have the right to claim for entitlements. Nevertheless, as

already observed, this is an attitude that is more frequent among “the poor of today” as confirmed by the front-line social workers in charge of implementing the two social programmes selected as case studies in this research. Consequently, while beneficiaries from the “Families Programme”, all adults of working age, exhibit this empowered attitude characterised by the managing of information about the state benefits available to them, older adults from the “Bonds Programme” do not, as it’s more difficult for them to identify the availability of the state offer, and their entitlement to it, independent of the relationship that they establish with front-line social workers:

‘People are empowered, very informed because they make their interests, expectations and demands prevail.’

(Social Worker (Family Supporter), Families Programme).

‘[We have to tell beneficiaries] That all the benefits that he can receive are because he is part of the programme, that it is a government programme, from the state (...). Then, of course, you try to explain, but they are (...) more grateful, [saying] “you came to my home and gave me this”.’

(Social Worker (Monitor), Bonds Programme)

As can be identified from the above professionals’ accounts, information seems to be a key factor behind this more empowered attitude observed among “the poor of today”; however, as analysed in previous chapters, this is more critical for older adults with scarce trajectories in the welfare field. Nevertheless, the high level of knowledge exhibited by younger generations seems to be a result, as observed by some professionals, of the impact of television and social media in Chilean society, which has allowed people to be more informed in general. Yet, the anti-poverty social programmes of the current system of social protection seem to have played a significant role as well, particularly in regards to the work of psychosocial support developed by professionals through which they can inform and ‘*educate*’ beneficiaries about the state social offer, along with its application procedures:

‘The social and formal education that is given by the different monitors and supporters to families educate them about the services, the application procedures, and the benefits that they effectively can have access to.’

(Social Worker, Head of the Department of Social Development and Promotion,
Municipality of Valparaíso)

'What I value most is all the information that we as professionals can give to families about the [state-social] networks that exist in the city because there are many people without much information.'

(Social Worker (Family Supporter), Families Programme)

'It is also part of the programme to accompany them [beneficiaries], inform them about their rights and the procedures to follow. Then, with this information, families progress, going in fact to some networks, claiming for certain things or leaving complaints.'

(Social Worker, Opening Roads Programme, NGO)

As identified in Chapter I, one of the most distinctive elements of the “Chile Solidario” system – the immediate antecedent of the current system of social protection in the country – was the implementation of a strategy of social intervention with the extremely poor that favoured their social inclusion into the state social network. In order to achieve that, “Chile Solidario” was developed “as a system” with the aim of articulating the social offer in place in the country, including personalised work with poor families (Barrientos, 2010:586) in order to ‘facilitate [people] the access to the state social offer’ (Larrañaga et al., 2014:1). Even though the Chilean system of social protection has had considerable modifications since “Chile Solidario”, this component of personalised work is still a part of the different programmes that form the “Subsystem of Securities and Opportunities” through the line of psychosocial support. This line was particularly valued by the group of professionals interviewed for this research because through it they were able to not only provide the information and education required by people to make use of the state social network or to claim for their rights, but also to accompany beneficiaries in defining their needs and projects, in which the capabilities and agency of the family group or beneficiaries could be strengthened:

'The programme is focused on each family meeting their goals inside the programme. It is hoped that each family would improve its quality of life according to their own expectations either in the spheres of education, housing or health.'

(Social Worker, Families Programme)

'[We] try to emphasise family planning, saving, so they can have a future projection; that they open the saving [bank] account for [applying to social] housing.'

(Social Worker, Habitability Programme)

As analysed in much detail in Chapter IV, the aim of the psychosocial support carried out by professionals is to “habilitate” and “activate” beneficiaries so that they can define their goals in matters of wellbeing, involve themselves in the state social network and establish family plans. All these actions, in one way or another, appeal to the “agency of the poor”. Here it is important to consider how the strategy of social inclusion of “the poor” that has guided the recent development of social assistance policies in Latin America has been particularly focused on the “agency of the poor”. In fact, among the goals behind this new agenda of social policy there was a particular concern for both the promotion and strengthening of capabilities among “the poor” regarded as key to the conditions of ‘social exclusion and powerlessness’ suffered by this group (Barrientos and Santibañez, 2009:12). In this sense, the new social policy consensus that has accompanied the development and diversification of social assistance policies in the region has been based on the strong belief that agency is needed in order ‘to ensure sustainable pathways out of poverty’ (Barrientos, Gideon and Molyneux, 2008:769). As we can expect, this consensus was highly influenced by “the capability approach”, which proposed a ‘more activity-orientated’ perspective of human life and development (Sen, 1995:15). Based on an understanding of human life ‘as a set of “doings and beings”’ (Sen, 2003:43), the capability approach regarded poverty as ‘the failure of some basic capabilities to function’ related to the lack of opportunities ‘to achieve some minimally acceptable levels of these functionings’ (Sen, 1992:15). This emphasis on capabilities and wellbeing constituted one of the referents behind the strategy of social inclusion settled in the country since “Chile Solidario”.

As a result of this active-oriented approach towards poverty, the new programmes of poverty relief of the region began to include “empowerment” as part of their goals, meaning in practice that the poor must ‘be trained and educated to prepare’ (Molyneux, 2008:783) for labour and social inclusion. Indeed, as the Chilean case suggests, “empowering the poor” implies both to provide information and training so that people can make use of the state social network to exercise their rights, as well as to support them in the identification of their needs, and the definition of their individual and family projects. This simultaneous focus on the agency of the poor, to some scholars, illustrates the “perverse confluence” (Dagnino, 2003) between the rights-based approach underlying Chile’s social protection policies, and the kind of “active citizenship” that neo-liberalism has tried to encourage among people living in poverty, particularly among the “welfare poor”. It is a perverse confluence because, even though these approaches towards the empowerment of “the poor” refer to different citizenship projects (social democratisation and neo-liberalism), they both ‘require active, proactive’ citizenship

(Dagnino, 2003:7). It was at this level of developing active citizenship where the first contradictions between rights-based social protection and the still residual social assistance policies in Chile began to emerge.

2. The Barriers to Empowerment: Subsidiarity, “Assistentialism” and CCTs

According to Schild (2002), the new promotional anti-poverty social programmes developed in Chile since the return to democracy have been characterised by the goal of enabling ‘marginal groups in society as rights-bearing subjects to access the means to meet their own needs’ (Schild, 2002:172). These goals have been related to the new discourse of poverty built in the country in which the social exclusion of the poor was regarded as a direct result of their ‘lack of skills or opportunities’ to become masters ‘of their own destiny’, particularly by their effective participation in the market (Schild, 2000:286). Even though ‘untrained’ and ‘unmarketable’, from the perspective of the kind of active citizenship promoted by neo-liberalism, the Chilean poor were still ‘remediable’ (Schild, 2000:286), only in need of the specialised support of social policy to empower themselves. It is worth noting here that this definition of “the poor” by what they lack is not something exclusive to neo-liberal social policies but rather, as Cruikshank (1999) argues, an “endemic” characteristic of liberal democratic societies and their particular modes of governing the social. In fact, participatory or democratic ‘technologies of citizenship’ such as those aimed at empowering the poor, have frequently been offered as solutions to the ‘lack of something’ among “the poor” such as power or self-interest (Cruikshank, 1999:3). Whether radical or orthodox in origin, the rationality behind the application of these technologies is more often than not driven by the “need” to promote among certain categories of people, in this case “the poor”, ‘autonomy, self-sufficiency’ or even ‘political engagement’ (Cruikshank, 1999:4). In one way or another, we can see this “ethos” in the anti-poverty programmes that form part of the “Subsystem of Securities and Opportunities”, particularly in the work of psychosocial support developed by the professionals interviewed, as the above quotations made clear. However, it is not a straightforward process but rather a complex one in which professionals are challenged by the often “passive” attitude of beneficiaries:

Social Worker 1: ‘What’s needed is that people also work to achieve their things, [that they] work together with professionals.’

Social Worker 2: ‘An active participation.’

Social Worker 1: 'Exactly. Active participation where the person doesn't wait to get the subsidy but rather we work together to get something: to get the house, better home equipment, that we work together.'

(Social Workers, Habitability Programme)

'... people should commit to real actions (...) because frequently, they prefer to be served without committing to feeling capable to truly achieve their purposes.'

(Social Worker, Families Programme)

From the interviews with the professionals, it was possible to identify a series of factors that seem to explain why some beneficiaries of the anti-poverty programmes selected as case studies of this research were not able to display a more “active” and “committed” participation. On the one hand, professionals signalled a series of problematic personal features among some beneficiaries, such as *'the lack of clear purposes'*, *'the block of ambitions'*, *'not taking advantage of opportunities'* or being *'settled'* with their current lives. What is important to highlight here is how all these features refer to the impact of welfare on the subjectivities of the poor, something that has been present in the discussions about “welfare dependency”. The particularity of the Chilean case, however, is that the welfare policies responsible for this “passivity” among beneficiaries are those that have in fact tried to empower the poor and encourage active citizenship among welfare beneficiaries. More than the individuals themselves, the problem in Chile is the type of state and welfare approach that has developed since “the neo-liberal transformation”, the so-called “subsidiary state”, particularly considering its impact on younger generations:

'... older adults' development and upbringing happened under a State that was not a subsidiary [State] as the one we have today (...). Now, subsidies are somehow targeted. I think they [older adults] have different conceptions about the responsibilities and tools that each one must have to get ahead, perhaps?'

(Social Worker 1, Habitability Programme)

'Yes, of course (...). Young people have grown and been raised in this subsidiary state, with its logic. Their thinking is very different. They expect everything to be given to them, and their lives to be solved.'

(Social Worker 2, Habitability Programme)

As analysed in Chapter I, the Chilean neo-liberal transformation involved the adoption of the “principle of subsidiarity” through which state social action became residual and was reserved only for the cases in which private actors and intermediate organisations were not able to adequately perform their activities (MIDEPLAN, 1991). As discussed, the adoption of this principle by the Chilean state involved a new way to approach state welfare duties. In fact, state welfare responsibilities began to focus on ensuring everyone had “opportunities” to satisfy their basic needs (i.e. feeding, education, health) and assisting only those groups unable to satisfy these needs by themselves. This is how, via the neo-liberal transformation, Chile became a “subsidiary state”, in which social assistance policies acquired predominance over other types of welfare interventions. Under these conditions prevailing in Chile as well as in the vast majority of region, there has been a growing “assistentialisation” of social policy, which has led to ‘the whole system of social policy [being] concentrated on problems of social assistance’ (Andrenacci, 2009:15).

Anti-poverty social policies like those in Chile can be regarded as a direct expression of the subsidiary model that has dominated since the neo-liberal transformation, with its focus on social assistance, particularly “the poor”. Even though more institutionalised, technical and influenced by a rights-based approach, these anti-poverty programmes still constitute forms of social assistance – that is, social policy that ‘historically has been limited to alleviate minimally the conditions of reproduction’ of lower-income groups without directly intervening on people’s position in the means of production, which has frequently been criticised for the resulting ‘disconnection’ of the problems of poverty ‘from the problems of work’ (Perez and Vecinday, 2016:92). In the light of these features, the current agenda of social policy in the region has been widely criticised for the lack of attention given to the structural factors producing widespread poverty and social inequality. However, what is problematic about social assistance is not only its scarce impact in matters of social distribution but also its negative effects on people’ subjectivities and social standing, an issue particularly salient for the professions directly linked with the implementation of social assistance measures such as social work. In the context of Latin American social work, such negative effects of social assistance policies have been captured by the concept of “assistentialism”, making reference to benefits and transfers driven by “the logic of favour” instead of the “logic of rights”, or when aid practices are guided only by the goal of satisfying ‘immediate material’ needs without generating critical awareness about people’s structural positions (Perez and Vecinday, 2016:95). This critique of social assistance from the pejorative denomination of “assistentialism” was part of the process of social-work re-conceptualisation carried out across

several Latin American countries during the 1960s by which the profession sought to embrace more transformative approaches to social assistance through the inclusion of educative and promotional logics aimed at avoiding alienation and dependency.

Beyond the specific field of social work, the anti-poverty social policies developed since the return to democracy in Chile have sought to differentiate themselves from the “assistentialism” that characterised Pinochet’s extreme-targeted social policies. In fact, such critiques against assistentialism can be regarded as one important factor behind the widespread adoption of “empowerment approaches” across Latin America. As noted by Molyneux, the development of this new anti-poverty agenda involved strong critiques of the “assistentialist character” of previous social assistance policies in the region based on an approach that regarded beneficiaries ‘as passive recipients of charity’ (Molyneux, 2008:783). Consequently, the new agenda of social policy encouraged a view of welfare beneficiaries as ‘empowered active citizens’ able to formulate their needs and define their priorities (Molyneux, 2008:783). Nevertheless, as the Chilean case suggests, the goal of forging an active citizenship among “the poor” in order to guide the new generation of subsidiary-social assistance programmes has failed to completely override assistentialism, as the following examples indicate:

‘... if the lady [beneficiary] fails more than three times or five times, if she doesn’t participate [in the programme’s meeting], and doesn’t open her house door [when visited by the programme’s professionals], you leave a document saying that: “she will have to interview with the programme manager”; if not, “she will have to immediately leave the programme”, and “that she has 15 days to come”. Some days later, she comes saying: “do you know Miss, I don’t want to leave the programme. I don’t want my transfers taken away”. So, how to explain to her that the programme goes far beyond the topic of transfers! Then, in practice, it [social assistance programmes] continues being a purely “assistentialist” matter.’

(Social Worker (Programme Manager), Families Programme)

‘Older people are the most grateful because they aren’t accustomed to the “assistentialist” culture, or it’s not in their values to say “I come and grab for myself this or that” (...). Then, you see younger people, the ones that complain the most for whatever they’re given because they’re already accustomed to that “assistentialist” culture.’

(Building Technician, Habitability Programme)

According to professionals' views, assistentialism makes direct reference to the attitudes and motivations of beneficiaries about the subsidies and transfers that they can obtain from their participation in current anti-poverty programmes. As such, even though Chilean anti-poverty programmes have incorporated more and more strategies to develop capabilities and tools among beneficiaries in order to empower them for labour and social inclusion, these programmes also have an important component of economic subsidies and unconditional and conditional cash transfers. As noted above, one of the most distinctive features of the "Chile Solidario" system and the strategy to relieve poverty that followed it, was the emphasis given to the social integration of the poor, particularly through the personalised psychosocial support provided by professionals to beneficiaries, along with a series of non-conditional cash transfers. Nevertheless, this '*spirit of a more personalised intervention with people*', as described by one of the professionals interviewed for this research, was to some extent lost when the right-wing government of Sebastian Piñera (2010–2014) decided to transform the "Chile Solidario" system into today's "Subsystem of Securities and Opportunities" and gave '*more notoriety to [cash] transfers*'. In fact, as documented in detail in Chapter I, along with the incorporation of a much stronger line of social-labour support to encourage income generation among the poor, the reforms carried out by Piñera also encompassed a considerable expansion of monetary transfers. The rationality behind this expansion of conditional and unconditional cash transfers in Chile was 'to relieve poverty by increasing family income, and generating incentives for schooling, sanitary attention, and educational and labour achievements' (Arza and Chahbenderian, 2014:37). Consequently, the monetary transfers distributed among the beneficiaries participating in the anti-poverty programmes that form part of the "Subsystem of Securities and Opportunities" were organised according to three pillars – the so-called "Dignity Transfers", "Duty Transfers" and "Achievement Transfers". The "Dignity Transfers" corresponded to two unconditional cash transfers targeted at families and people living in extreme poverty. The "Duty Transfers" encompassed conditional cash transfers associated with children's school attendance and health controls. The "Achievement Transfers" included conditional cash transfers targeted at the 30% and 40% of the most vulnerable population, encompassing transfers conditional to graduation from primary and secondary school, and transfers for labour formalisation, including the subsidy to woman's employment ("*subsidio al empleo de la mujer*") targeted at waged and independent female workers with social security contributions.

According to Cecchini et al., the configuration of this system of monetary transfers combining conditional and unconditional elements constitutes a “rights” formula of social assistance. According to these authors, the inclusion of unconditional cash transfers plays a very significant role here, bearing in mind that they not only ensure a minimum income level for beneficiaries granted only for the fact of being in poverty but also because it helps to minimise the risk of establishing distinctions among the “deserving” and “undeserving” poor (Cecchini et al., 2012:4). Nevertheless, the system of transfers established in the country seems to exhibit a strong component of deservingness, as can be seen in the “Duty Transfers”, and especially in the “Achievement Transfers”, which include a series of “merits”, as described by Ceballos, to be shown by welfare beneficiaries, particularly women, if they want to qualify for the transfers (Ceballos, 2015). Overall, guaranteeing some basic level of income as well as encouraging proactive behaviours among “the poor” can be regarded as part of the logic and goals behind the implementation of CCTs, particularly those centred on childhood development. This anti-poverty approach, according to Rawlings (2004), represents a significant departure from traditional forms of social assistance through a design that combines the short-term goal of providing income with the longer-term goal of accumulating human capital to avoid the intergenerational transmission of poverty. Notwithstanding the “innovative” elements introduced by CCTs, it is possible to identify a series of critical implications of this anti-poverty strategy. The establishment of conditionalities to receive cash transfers is of course the most important one, which, through the principle of “co-responsibility”, requires families, in practice women, ‘to assume responsibility for schooling, health and the appropriate use of cash grants’ (Rawlings, 2014:6). To some, this anti-poverty strategy instrumentalises poor women’s work in order to activate “the poor of tomorrow” by focusing social intervention on younger generations in poverty, the most deserving sub-category among the poor. To others, this type of anti-poverty approach based on conditionalities constitutes a state mechanism of ‘social control’ that aims to minimise social conflict and maintain “the status quo” (Perez and Vecinday, 2016:94). As such, it includes a whole strategy based on a “behaviourist philosophy”, as defined by Wacquant (2011), that works through dissuasion, surveillance, stigmatisation and sanctions, all features that would be present in the punitive strategies of today’s workfare approaches that seek to emphasise citizenship duties over citizen’s rights.

Bearing all these critical issues in mind, it is possible to see how the social control component contained in the very logic under which CCTs operate seems to constitute the dark side of the discourse of empowerment and active citizenship promoted by current social assistance policies in Chile. In fact, considering professionals' experiences in the implementation of anti-poverty programmes at the local level, it can be observed how the simultaneous presence of elements of activation and social control, particularly in the case of CCTs, represents a very critical issue when working with beneficiaries due to the contradictory incentives and disincentives that this new strategy of social assistance entails:

'... [what is critical is] the coexistence of different discourses because (...) you're telling them [beneficiaries] "to enter the system of securities and opportunities", "we are going to work together" (...) [through] "psychosocial support" (...). But more than anything, people are more interested in the transfer. (...) I mean, our whole intervention is today determined by whether or not we made mistakes with the transfers (...). Because people went to collect them but weren't paid so that [people end up saying] "I'm not interested in working on this, bye...'

(Anthropologist, Head of the Social Unit Manager, Ministry of Social Development, region of Valparaíso)

'Sometimes the poor receive solutions that they don't want, that they're not interested in. Look at the "Bridge Programme" [of the previous "Chile Solidario" system], what is today the "Subsystem of Securities and Opportunities". The poor must sign a consent letter [and] must agree on receiving the family supporter during the whole intervention period, which they might want to receive or not. But as they're interested in the transfer, interested in the micro-entrepreneurship or whatever they're going to receive, they're compelled to do so...'

(Social Worker, Head of the Department of Social Development and Promotion, Municipality of Valparaíso)

These experiences made direct reference to the degree of engagement and participation of "the poor" in the programmes' intervention, particularly in the component of psychosocial support to be developed with professionals. According to the professionals, the real chance of empowerment, activation and independence depend mainly on this component. Nevertheless, the possibility to obtain cash transfers represents a critical factor in deciding to participate in these social programmes because beneficiaries are under socio-economic deprivation and are seeking to satisfy a series of immediate needs. These contradictory goals and motivations in "the welfare situation" (Peillon, 1998) are related to one of the most significant issues underlying welfare, and in particular social assistance – namely, the fact that it constitutes 'a

form of government that is both voluntary and coercive' (Cruikshank, 1999:38). In fact, the basic formula for governing "the social" developed by liberal democracies is to 'govern people' by getting them 'to govern themselves' (Cruikshank, 1999:39). This involves working on people's subjectivities in order to encourage the development of self-government. However, the problematic issue here, as observed in the above professionals' quotations, is how to produce this active mode of self-government among people, particularly among those who are subjects of welfare, to go beyond "the mere" satisfaction of immediate needs. After all, governing the social and intervening in social problems such as poverty via welfare programmes that are both voluntary and coercive, depend heavily on 'getting the recipient to see her own interests' (Cruikshank, 1999:23) in those strategies that compel people to govern themselves.

From this perspective, it is possible to see how social programmes that seek to intervene at the level of subjectivity require some basic degree of consent or agreement with the goals that guide anti-poverty programmes and professionals' actions. Of course, this does not mean that professionals and the whole social policy strategy share exactly the same goals. As we have seen, professionals' motivations for activating and empowering the poor seem to be mainly driven by their ethical-professional concerns about avoiding assistentialism, rather than fostering a neo-liberal, active citizenship. Notwithstanding professionals' concerns, the process of social intervention as well as the direct interaction between administrative agencies and beneficiaries still 'belong to a structure of domination' that constitutes "the welfare field" (Peillon, 1998:221) – a field that even when seeking to empower people and guarantee some basic levels of rights and entitlements, is, however, organised by relations of control. In the specific site of the welfare situation, these relations of control involve the activation of 'a wide range of micro-powers' or a series of practices that 'aim at normalizing' in order to 'fashion people' to the goals established by welfare programmes (Peillon, 1998: 218). Interesting to note here is the fact that even though welfare relations involve this series of control practices and strategies, they are 'largely misrecognized' as relations of care, which allows the activation of 'symbolic structures' that form part of agents' habitus and help significantly 'to ensure compliance' (Peillon, 1998:221). As Peillon stated, we cannot exaggerate the 'effectiveness' of misrecognition in terms of ensuring absolute compliance and domination because control practices, more often than not, 'meet with strategies of resistance', which leads to the conclusion that, more than an absolute system of control, the welfare field, and in particular the welfare situation, constitutes a 'site of struggle' (Peillon, 1998:221).

Following the logic outlined before, it could be possible to think that the lack of deeper engagement and active participation of beneficiaries observed by professionals during the process of intervention could be part of some kind of resistance of “the poor” to fully engage in the control practices in action through the welfare situation. However, from the perspective of the professionals interviewed, these behaviours among beneficiaries seemed to be the result of the very logic and organisation of welfare and anti-poverty social policies in the country today where there is a clear contradiction between empowerment discourses, on the one hand, and the disempowering practices and effects produced by the current forms of social assistance, on the other:

‘I believe these policies are in some way dichotomous policies because, on the one hand, there is a discourse that tells you that “we have to empower”, that “the citizen is a subject of rights”, with a clear promotional perspective. But I give them [beneficiaries] encapsulated benefits that are obtained for being minimal (...), that is, I get the benefit by being needy, not for self-improvement. Therefore, I do not have to make commitments with myself or with anyone because I am going to receive benefits for being a helpless person, for being an incompetent person, for being a vulnerable person, for being a needy person. So, when are we going to reverse that? Never!’

(Social Worker, Head of the Department of Social Development and Promotion,
Municipality of Valparaíso)

3. Targeting, Deservingness and Misrecognition

The contradiction between a social policy discourse that considers “the poor” as a subject of rights and seeks to empower beneficiaries, and how these anti-poverty programs operate in practice can be explained by several interrelated factors. The first refers to the approach to poverty underlying current anti-poverty social policies in Chile, which rather than focusing on the potential or ‘resources’ of people, concentrates instead on people’s needs and deficiencies:

‘I see how today we are returning to the model of needs: of the “lack of”, the “requirement of”, and the “compliance with”, of the absence rather than the resources [of people]. In reality, we have seen how the implementation of policies by municipalities, by the networks of social protection, always ends up targeting poverty but without understanding it in its whole dimension. Or without being able to cover the complexity of the lives of people in poverty (...). Because to obtain certain benefits, the family must meet some previous conditions but, in some cases, these previous conditions don’t exist. They do not exist

because they're precisely the excluded families, because they're the families that are in marginality.'

(Social Worker, Opening Roads Programme)

What is misrecognised in this individualising approach to poverty is the fact that people's situations, and the chances that they have to be more active and empowered, are heavily constrained by their social positions and the structural inequalities that determine their social exclusion and marginality. This was widely acknowledged and criticised by the professionals interviewed for this research, which led them to negatively define the current anti-poverty policies of the country as '*palliative*', '*superficial*' and '*reactive*' – policies that are not aimed at really resolving '*the root problem*' but rather to only provide some help for people '*to be a little less poor*' so '*making them look socially less poor*'. For professionals, the main problem here was the type of targeted or 'selective' social policies that crossed the whole system of social protection, particularly among the programmes that seek to relieve poverty. In this case, the critique of selectivity was based on the positive impacts that universal social policies could have on the developing of 'tools' and independence among welfare beneficiaries:

'... if instead of investing so much in all this paraphernalia [social assistance], the state would provide resources for free and high-quality education, maybe tomorrow I'll not have to invest too much on social assistance because I've already prepared people with tools by investing in education, in technical careers, in professional careers. I gave people the tools to overcome poverty (...). Then, as the old saying goes: "we have to teach fishing, not give the fish cooked". So, for me, to teach fishing is to improve educational conditions and hence, employment conditions...'

(Social Worker, Head of the Department of Social Development and Promotion,
Municipality of Valparaíso)

The above quotation refers to a different conception of "tools" that is dependent on providing favourable social conditions for people to be able to develop capabilities that would help them overcome poverty and achieve some level of social mobility. As argued by Sen, the chances that people have to convert resources 'into capabilities to function depends', not only on a series of personal attributes (such as age, gender, health, etc), but also on 'social surroundings (including epidemiological characteristics, physical and social environments, public services of health and education, and so on)' (Sen, 1995:15). This conception of tools, in turn, is based on a different notion of social citizenship that is not so dependent on active citizenship and individual empowerment since citizens would be provided with more concrete

structural measures that would guarantee better opportunities for social mobility and integration. It is against this different conception of tools and social citizenship that the neo-liberal conception of active citizenship through strategies of individual empowerment and conditional cash transfers loses its credibility or legitimacy, particularly when looking at the shortcomings of this new strategy of social assistance to produce self-sufficiency and independence among beneficiaries as indicated by the evidence included in previous chapters. In fact, the opposite seems to be the case because according to the experiences of the professionals interviewed in this study, current anti-poverty programmes, particularly CCTs, end up *'limiting the capabilities of people'*, *'taking their autonomy away'* and being approached only as *'recipients'* of subsidies – all issues that refer to the disempowering effects of current anti-poverty programmes in Chile, which is directly related to problems of welfare dependency. However, part of these negative effects or disincentives can be explained by the very conception of the subject-citizen underlying social assistance policies:

'... at the end of the day (...), the relationship [with beneficiaries] materialises in that "if you do not come, we are going to take you out of the programme" [and] in value judgements about the [welfare] subject that do not consider a promotional vision. It is said "the user", "the beneficiary", not "the participant" ...'

(Social Worker 2, Opening Roads Programme)

'I feel that the state is not ready for this subject of rights because it still makes [him/her] a beneficiary, a user. Asking them [to fill] requirements. Asking them to give proof of their life [conditions]. I mean, there is too much justification, too many requirements, papers (...). You still have to give me proof that you are poor. That issue is quite outrageous because if I am a subject of rights, why do I have to prove that I am poor?!'

(Social Worker, Head of the Department of Social Development and Promotion,
Municipality of Valparaíso)

'I think there is still this thing about "the duties and the rights". It is still thought that the exercise of citizenship, or that the access to your rights, is related to certain duties. You see that in how the possibilities to access certain benefits that should be a right [are dependent on] people meeting certain things to access them...'

(Social Worker 1, Opening Roads Programme)

The above professionals' accounts lead to the question as to how the Chilean system of social protection, with its series of targeted cash transfers programmes and subsidies, works under a quite negative conception of the welfare subject who to be entitled some basic welfare rights

needs always to prove their degree of deservingness. Further, conditional cash transfers, as well as other requirements to be met by beneficiaries (such as levels of participation and bureaucratic controls) have made this dimension of deservingness more salient. As analysed in the previous chapter, this has to do with the fact that it is now not enough to be in poverty to receive some kind of basic entitlement but also one needs to perform some activities and behaviours to be entitled to welfare benefits. This is the problem with the renewed emphasis on conditions or “merits” guiding the contemporary logics of social assistance – namely, it ends up re-enacting this “imaginary” or “ideology” of deservingness that has historically undermined the recognition of the poor as a subject of rights. In the light of this, we can better understand the professionals’ concerns about those welfare categories applied to the poor such as the “beneficiary” or the “user”. To some extent, those categories indicate or remind recipients about their subordinate position in the welfare field, that they are not entitled to any right until they prove their deservingness and until they meet a series of basic requirements and conditions. There is a symbolic and moral force in these official categorisations applied to the welfare subject that concerns professionals – that is, the welfare categories produced and applied by the state work not just as administrative classifications but also as moral categories, carrying with them a series of value judgements about individuals.

Hence, even though Chile has tried to build a social protection system that incorporated a rights-based approach, especially in the field of social assistance, it has not been able to overcome a series of administrative and organisational failures that resulted in forms of symbolic violence that undermine the citizenship status of welfare beneficiaries, particularly in terms of their moral worth. As the above professionals’ quotations suggest, people in poverty continue to be subject to classificatory practices and bureaucratic tests that do not just condition their access to benefits and rights but also seem to reify their subordinated status in Chilean society. This is one of the most fundamental contradictions of the Chilean system of social protection: even though it aims to empower “the poor” and guarantee some basic social guarantees, it nevertheless ends up severely limiting the chances of recognising this group as a subject of rights due to the moral implications of targeted and classificatory practices, as well as by the establishment of conditional benefits. Overall, what seems to explain these contradictions is ‘the second-stigmatizing-recognition dynamic’ (Fraser, 1995:85) produced under liberal welfare regimes, which distinguish between social insurance schemes designed for the vast majority of the population and residual social assistance for the poor. One of the main problems behind this welfare differentiation is, among other things, that it ends up neglecting the basic premise under which welfare, as a mechanism of social redistribution, is

supposed to be based on – namely, ‘a universalist conception of recognition’, or in other words, on ‘the equal moral worth of persons’ (Fraser, 1995:85). This occurs, as discussed above, due to the administrative treatment received by beneficiaries of social assistance, in terms of the requirements and official categorisations that people have to go through. However, it also occurs due to the stigmatisation produced by the often under-appreciated, “residual” welfare channel, which makes welfare subjects publicly appear to be ‘privileged’, receiving a kind ‘special treatment and undeserved largess’ (Fraser, 1995:85). The whole dynamic produces “injustices of recognition”, which are the result of ‘institutionalized cultural values’ that negatively affect ‘the relative standing of social actors’ (Fraser, 2003:29).

As analysed in detail in this research through the case of “the welfare poor”, injustices of recognition are highly significant for people living in poverty. This is due to the fact that apart from ‘inadequate incomes and living standards’, poverty constitutes ‘a shameful social relation’ determined by the ways in which ‘the media, politicians, officials, and professionals talk about, and actually treat people living in poverty’ (Lister, 2004:112). Lister asserts that a politics of recognition is particularly relevant to acknowledge ‘the full citizenship’ of people living in poverty, which requires, among other things, to provide conditions that foster ‘a sense of equality of status and respect’ among, and also in regards to, this population group (Lister, 2004:112). As argued by this research, welfare and social policy play an important role here considering how the establishment of social and welfare rights has been guided, among other things, by the goal or the ideal of affording ‘every member of society the measure of social recognition that makes him or her a full citizen’ (Honneth, 2004:352). In this sense, through the development of social citizenship and welfare rights, it would be possible to secure to all citizens ‘a minimum of social esteem and economic welfare independent of actual achievement’ (Honneth and Fraser, 2003:149). Nevertheless, as extensively analysed throughout this research, it is precisely this principle of achievement, or in other words ‘the idea that everyone deserves’ recognition in accordance with his/her contributions to society (Schweiger, 2014:268), that must be considered when analysing the citizenship status of groups living in poverty and depending on social assistance. On the one hand, there are the stigmatising recognition dynamics produced by the residual channels of social assistance established under liberal welfare regimes that neglect the equal social worth of “the welfare poor”. And on the other hand, according to Honneth, welfare or social assistance programmes ‘do not suffice’ because they should allow beneficiaries to participate in ‘the process of social cooperation’ through which citizens are able to gain social esteem in accordance with their social contributions (Honneth, 2004:352).

Perhaps Honneth is right in regards to the dynamics of misrecognition developed in the field of social assistance in Chile, because notwithstanding the significant progress achieved in the country in terms of the expansion and institutionalisation of social assistance policies, along with the inclusion of a rights-based social protection approach, these policies are still not able to provide unconditional sources of social recognition for people living in poverty but rather the opposite:

'... I feel that by targeting everything to poor people, what we're doing is putting them in a straightjacket that they can't escape. Because what we're asking of them, perhaps even us as citizens could not fulfil. It is very high pressure. I understand perfectly why it is hard for people to participate [when selected in anti-poverty programmes] (...) because whatever government is in power, whatever the situation in the municipality, [he/she] will always be conditioned. Then, "I always have to meet something (...) [because] if not, I'm always going to be sanctioned and punished".'

(Social Worker 1, Opening Roads Programme)

Of particular interest in the above quote is the comparison between being a welfare beneficiary and being put in a straightjacket. To some extent, this resembles Cruikshank's observation about the differences that exist between "the democratic", "active citizen" and the "welfare subject". To Cruikshank, the main difference is that "dependants" or those "needing help" are 'in a tangled field of power and knowledge that both enables and constrains the possibilities of citizenship' (Cruikshank, 1999:20). In line with this view, the reference made to the "pressures" suffered by welfare beneficiaries when participating in social assistance programmes seems to be the result of the contradictory visions about the welfare-subject underlying the strategy to relieve poverty in Chile today. As identified throughout this chapter, social assistance in Chile is full of several and sometimes contradictory discourses, carrying with them a diverse range of interpretations about poverty and the needs of people living in poverty. First, there is the rights-based approach that frames the current social protection system of the country, with its goal of providing basic guarantees to secure minimal conditions of social integration for the poor. Secondly, there is the empowerment strategy that seeks to develop an active citizenship among the poor through training that allows them to acquire a series of capabilities and tools. Thirdly, there are the conditional cash transfers that disincentivise deeper participation, and that make the issue of deservingness more salient among beneficiaries. This is the contradictory "field" in which beneficiaries are "tangled", which translates, in practice, in a series of different expectations and demands about the involvement and participation of welfare beneficiaries:

'That is my view, to the extent that I see them as beneficiaries, as permanent clients of the state, I'm always going to assume that they have not grown enough, and then, it is like a vicious cycle: I believe that he doesn't have qualities, and he believes that he doesn't have them either and that the state has to resolve it, but I want in turn that he resolves that. I criticise him because he is dependent, but I continue to make him dependent.'

(Social Worker, Head of the Department of Social Development and Promotion,
Municipality of Valparaíso)

To a great extent, these “messy” assumptions and expectations about “the welfare poor” in the field of social assistance in Chile can be explained by the mechanisms of targeting through which current anti-poverty programmes operate in the country. In the context of neo-liberal welfare reforms, targeting has been regarded as an efficient means to avoid welfare dependency in the light of its design features (limited coverage and small-size benefits), and as particularly effective in avoiding the perverse incentives that have affected people’s rationalities and behaviours in the past. However, as the Chilean case suggests, targeting has not managed to override such negative incentives, but rather the contrary. This is critical not only in terms of the production-reproduction of welfare dependency, but also considering the way in which neo-liberalism, with its goal of fostering an active citizenship among lower income groups, contradicts itself when the welfare system is not able to recognise and “award” people’s merits and efforts ‘to overcome themselves’:

'... it is like these [welfare] services encourage people to stay there (...) [because] there is no award for those that want to overcome themselves. This is why I'm talking about punishment (...). It should be rewarded if you are able to overcome yourself by giving you a higher percentage [of assistance], for instance, when applying for your [social] housing. Or by reducing the costs of your educational credit. But that is not the case (...). Actually, if you improve yourself, you will not continue receiving any other [welfare] benefit. If you find a job (...), you lose your benefits...'

(Social Worker, FOSIS Valparaíso)

It is interesting to observe here how the professional pointed to a situation that affects not only welfare beneficiaries but also broader sectors of the Chilean population. In the end, the problem with targeting, and the current reduction of social policy to social assistance programmes, is not merely about whether this is more or less welfare dependency or more or less stigmatisation of the categories of the population subject to it. It also concerns how some of the injustices of recognition suffered by the welfare poor, are also suffered by those who are left behind by the state, misrecognised as possible and legitimate subjects of welfare:

'You feel that you punish people, because for the people that you seek to help (...) there is no programmatic offer. The programmatic offer is for the poor [person who] (...) hasn't done anything for himself or couldn't or I don't know. But this other poor who is a little bit more trained gets out of the margins [is overqualified for welfare support] ...'

(Social Worker, Head of the Department of Social Development and Promotion,
Municipality of Valparaíso)

Such welfare exclusions are the direct product of the socio-economic discriminations produced by the mechanisms of targeting and selection in place in the country, which apart from establishing differences among a population group affected by quite similar living conditions, do not acknowledge the struggles and efforts made by some members of the poor to improve their living conditions. These are the everyday '*injustices of the system*' of the Chilean liberal and residual welfare system, which front-line professionals must deal with. Procedural injustices and inequalities produce a lot of '*frustration*' and '*anger*' among those groups that expect to be entitled to benefits, not just because of their socio-economic situation but also because of their merits and '*efforts*':

'(...) There is always the case of that person who believes he/she qualifies for some benefit but doesn't receive it. The comparison: "my neighbour that doesn't do anything and I, that strive, that work, and they don't invite me to participate in the programme.'

(Anthropologist, Head of the Social Unit Manager, Ministry of Social Development, region
of Valparaíso)

Hence, as discussed above, there are a number of problems with targeted social policies. Such policies disincentivise a good work ethic and lead to welfare dependency. They reproduce the subordinate status of the poor through a series of bureaucratic and administrative treatments that severally constrain their chances to be unconditionally recognised as a subject of rights. They impact on the citizenship status of "the poor"; in the context of residual social assistance, the meritocratic promise behind the neo-liberal project of citizenship is never realised. As identified in the previous chapter, independent from being an active citizen or not, there is no reward to people's achievements when struggling to improve their living conditions – instead there is punishment through either the loss of or exclusion from welfare support. This is one of the fundamental contradictions underlying the welfare field in Chile.

Conclusion

This final empirical chapter has analysed the conditions of welfare inclusion prevailing among social assistance policies in Chile, which apart from their recent expansion and institutionalisation have incorporated a rights-based approach guided by the logic of providing citizenship guarantees for groups living in poverty and vulnerability. Through the analysis of the experiences of professionals directly involved in the implementation of the system of social protection at the local level, it identified the type of “welfare citizenship” forged among people in poverty as a result of their recent inclusion in the welfare field. In this sense, apart from identifying several contradicting discourses framing the approach towards poverty and the construction of people’s needs, it also distinguished the conditional welfare citizenship to which those targeted by social assistance programmes and benefits are entitled. This conditional status in the welfare field was explained by the requirements and conditions expected to be met by beneficiaries when participating in these programmes, which in turn re-enacted the logic and ideology of deservedness. It is a conditional welfare citizenship because inclusion into the welfare field depends on people remaining in poverty, as any sign of improvement constitutes a factor to be excluded from welfare support. These are the dynamics of inclusion/exclusion developed under the neo-liberal orientation shaping welfare and social policy in countries like Chile, which in the case of those groups living in poverty and targeted by social assistance policies includes access to a welfare citizenship that is always conditional.

CONCLUSIONS

One of the main purposes of this study was to develop a grounded and qualitative exploration of the citizenship implications of the contemporary expansion of social assistance policies in Chile. In this sense, the main question addressed by this research was: whether and to what extent have social assistance policies contributed to enhancing the citizenship status of “the poor” in Chile? Research question that was accompanied by two corresponding subsidiary questions: 1) to what extent have social assistance policies helped to provide welfare beneficiaries with better living conditions and opportunities? and 2) to what extent has the expansion of social assistance provision contributed to promote the recognition of the poor as subject of rights? At first glance, researching the impact of social assistance policies on the citizenship status of the poor could be perceived as a somewhat controversial inquiry considering how “the poor” or “the welfare beneficiary” have represented the antithesis of liberal conceptions of rights-holders as a result of their allegedly dependent status and lack of social contributions. To a large extent, this stigmatising conception has been produced and reproduced by the historical differentiation between social insurance and social assistance characteristic of several welfare regimes, particularly of those liberal – and now neo-liberal – welfare regimes, as analysed throughout this research. Nevertheless, the articulation of both systems, as well as their degree of development and institutionalisation, vary significantly in accordance with countries’ historical welfare trajectories. In this sense, notwithstanding the general expansion of neo-liberal reforms across developed and developing countries during the last few decades, the relative impacts and implications of these reforms on the sphere of welfare and social citizenship are highly dependent on countries’ specific welfare architectures and trajectories. Following this context-specific approach towards welfare and social rights, the main concern of this research was to explore the citizenship implications of the current expansion of social assistance policies in Latin America, understanding that although this development constitutes one of the more concrete expressions of the reconfiguration of the “truncated” welfare regimes that prevailed in the region prior to neo-liberal reforms, it constitutes, nevertheless, a novel social policy trend. Through this trend it has been possible to secure in the region, in different degrees in accordance with countries’ specific development, the welfare inclusion of a social category previously excluded from the main channels of social protection – the poor.

Consequently, one of the main contributions of this research is to acknowledge the citizenship implications associated with the contemporary expansion of social assistance policies in the region in the light of the historical underdevelopment of these policies prior the 1980s, a critical condition that left those living in poverty and under conditions of labour informality excluded from welfare support. In this sense, this research contributes significantly to place the contemporary development of social assistance in the wider welfare trajectory followed in the region; a broader and more complex approach that allow to distinguish the change in status experienced by “the poor” under the new welfare architectures in place in countries like Chile, namely, from welfare exclusion to welfare inclusion. Nevertheless, assuming this wider socio-historical approach towards the recent development of social assistance implied, since the beginning, to take a critical distance from the macro narratives about “neo-liberalism” shaping several accounts about welfare reform and the contemporary rise of social assistance policies in the region. Macro-narratives and generalising accounts that frequently lose sight of the stratifying conditions of welfare inclusion prevailing among the welfare architectures in place in Latin America prior to neo-liberal reforms. As widely documented in this research, such welfare stratification in countries like Chile was based on citizens’ occupational status and gender, which in addition to the underdevelopment of social assistance, impacted heavily on informal workers and poor women who remained mostly excluded from welfare support.

It was in acknowledgement of the practical (not ideal) trajectory of welfare development followed in the region and the dynamics of inclusion/exclusion associated with the historical institutionalisation of social rights in countries like Chile, that this research sought to identify whether and to what extent have social assistance policies contributed to enhancing the citizenship status of “the poor” in Chile? A research question that implied to analyse the quality of the conditions of welfare inclusion provided to groups living in poverty in order to identify the type of “welfare citizenship” being forged among current beneficiaries of social assistance policies. This grounded approach towards the “welfare citizenship of the poor” in these neo-liberal times involved empirical exploration of the terms and conditions of inclusion prevailing among welfare programmes in Chile, and in the welfare field in general, along with their impacts on the processes of self-identification being experienced by welfare beneficiaries. Based on this approach, it was possible to explore the objective and subjective dimensions involved in the process of welfare inclusion of the poor through social assistance policies, and to consider its impacts in terms of both distribution and recognition. As contained in the two subsidiary questions addressed by this research, it was important to know 1) to what extent have social assistance policies helped to provide welfare beneficiaries with better living

conditions and opportunities? and 2) to what extent has the expansion of social assistance provision contributed to promote the recognition of the poor as subject of rights? Consequently, in order to answer these questions, the research involved the examination of the anti-poverty strategy of the country through the empirical analysis of two different welfare programmes targeted at different sections of the welfare poor and from different generations. Based on the analysis of “the lived experiences of welfare” of both beneficiaries and professionals engaged in the local implementation of social assistance policies in Chile, it was possible to identify to what extent the current expansion and institutionalisation of social assistance policies have provided conditions of social recognition of the poor as subjects of rights. As argued by this research, social assistance can provide conditions of social recognition of the poor as rights-holders if: the methods of targeting and selection used by social assistance programmes do not inflict any humiliating effects; selection and participation in welfare programmes constitute a positive source of discrimination for people in accordance with their particular needs and social contributions; and it is in line with the general welfare regime shaping the magnitude of the anti-poverty approach underlying social assistance policies. A complex methodological approach elaborated to empirically research the effects produced by social assistance policies, and in particular, the methods of targeting and selection, on the citizenship status of welfare beneficiaries that can be regarded as one of the most significant contributions and innovations produced by this study.

As identified in Chapter VI, among the 25 welfare beneficiaries interviewed for this research, only 11 regarded their welfare entitlements, along with their participation in social assistance programmes, as their right. Among this group, younger generations were found to justify the right to welfare on citizens’ economic contributions, particularly through the payment of taxes and social security contributions. This emphasis on citizens’ economic contributions or duties was to make clear how the financial resources of the state came “from the people” and therefore, on the certainty that no one was receiving welfare support “for free”. In fact, it was an awareness of their lack of social security contributions among some of the older woman interviewed for this research that made them feel particularly grateful for their social pensions considering the exceptionality of their entitlement in comparison to those older adults who had contributed to social security during their life trajectories. To some extent, the predominance of this “contributive view” about the right to welfare support among lower income groups is not unusual in a country where its welfare regime has given historically high predominance to citizens’ economic contributions, particularly those from productive formal work. In this sense, as argued by this research, we can see how the general welfare architecture in which social

assistance policies are placed clearly impact on how people experience their welfare entitlements as their rights in accordance with the rules and conditions that under this regime apply to citizenship rights, something that in Chile has been historically associated with labour contributions.

However, this research also found that some of the older women entitled to social pensions were able to justify their right to non-contributive social security based on their identification and contribution as “mothers”, making direct reference to the tasks and sacrifices associated with this role. Identification that resembles the “maternalism” that have prevailed historically among Latin American societies, and that has constituted a different basis of entitlement for women in the context of the welfare regimes of the region. In the light of this, it is not difficult to understand why social pensions can work as a positive source of discrimination for older women. In the light of this, it is not difficult to understand why social pensions can work as a positive source of discrimination for older women with life trajectories in poverty, which in this case seems to be the direct effect of gender-sensitive social policy reform and measure. In fact, to some extent, social pensions were thought to be a strategy to deal with the structural disadvantages and discriminations suffered by women in both the labour market and the social security system of the country during their life trajectories as a result of their gender status that translated into a high proportion of older women without social protection during old age, which is also the stage when they are more vulnerable to poverty. Apart from the case of social pensions, the research was able to identify a similar affirmative logic in the case of the “Bonds Programme” targeting older adults in poverty and vulnerability. Considering how the anti-poverty approach of the programme and the construction of people’s needs were sensitive to the circumstances and vulnerabilities experienced by older adults, it was clear how selection and participation in the programme constituted a form of affirmative action towards beneficiaries as they felt “taken into account” and “cared about” by the state as older adults whose lives and social contributions matter. Together, both cases provide evidence, as argued by this research, about how categorical targeting can make a difference on how welfare beneficiaries can experience social assistance benefits as their rights.

In the light of the above, it is possible to conclude, as demonstrated by this research, how the methods of targeting and selection used by social assistance policies are highly consequential in terms of both social distribution and recognition. As analysed in the case of younger women participating in the “Families Programme”, the invisibilization of poor women as subjects of welfare due to both the methods of targeting used by the programme and its anti-poverty

approach focused on family wellbeing, contributes significantly to the institutionalisation of the lower social status of poor women in Chilean society. This could be seen in the instrumental approach for developing entrepreneurship projects with poor women that sought to generate additional sources of income among poor households but that did not, in any substantial way, alleviate and redistribute the burdens associated with family reproduction and care under conditions of socio-economic deprivation experienced by women. Entrepreneurship activities do not constitute a serious and systematic strategy to deal with the structural constraints and discriminations impeding women, particularly poor women, to participate more, and in better conditions, in the formal labour market. This reproductive logic institutionalises the injustices of distribution and recognition suffered by poor women, and offers them few prospects of significant social mobility since the labour strategy to activate the poor in Chile through informal entrepreneurship represents no more than survival economic activities. Based on this evidence, it could be possible to conclude that, although current anti-poverty programmes such as the “Families programme” are providing cash transfers, as well as encouraging entrepreneurship activities which together can contribute to the process of daily reproduction of poor households, their impact is limited in terms of sustainable securing better living conditions and opportunities of social mobility for the poor. A critical issue that tell us about the short-term impact of these type of social assistance policies, along with the lack of attention given to the structural factors underlying beneficiaries’ poverty such as the lack of educational credentials, labour informality, and gender inequality, among others.

Notwithstanding the critical shortcomings associated with the entrepreneurship strategy, it is relevant to highlight, as demonstrated by this research, how it constitutes an anti-poverty formula with important citizenship implications, particularly in regards to the process of self-identification being experienced by younger generations of welfare beneficiaries. As found by this study, the justifications argued by welfare beneficiaries who did not regard their entitlements as their right were based on the belief that selection in social assistance programmes was an issue of “luck”, which suggests that the mechanisms of targeting and selection in use in the country are not fully understood by welfare beneficiaries. Beyond that, for several beneficiaries, particularly those from younger generations, selection and participation in social assistance programmes, especially in those associated with entrepreneurship, was regarded not as a right but rather as an “opportunity” to which it was necessary “to take advantage of”. This emphasis on opportunities encapsulates the understanding of social mobility as based on the efforts and the entrepreneurship capacities of the poor, which to some extent reflects the meritocratic normativity framing the liberal

orientation of the welfare regime in place in the country since the 1980's "neo-liberal transformation". This meritocratic promise, as found by this research, was built on a conception of deservingness based on beneficiaries' commitment and active participation in social assistance programmes. In fact, this was the expectation of welfare professionals when working with the poor, which in the case of social workers was regarded as critical due to the meritocratic normativity shaping different sectors of Chilean population, including the professional-middle class. Apart from that, it was an expectation based on the worries of professionals about the disempowering effects of the subsidiary logic of the welfare regime in place in the country that encouraged passivity and dependency among the poor. This issue was particularly critical for welfare beneficiaries from older generations who had seen how younger generations expected to receive everything for free from the state in circumstances where they were not as poor as they claimed to be. In the light of these social representations and prejudices about the reception of welfare support among the poor, it is not difficult to understand why several welfare beneficiaries from younger generations were not able to claim their right to welfare support, despite their accumulated experiences of selection and participation in social assistance programmes during the last decades. It was safer, and perhaps more socially acceptable, to identify their participation in welfare programmes as an opportunity since it highlighted the necessity to show and demonstrate beneficiaries' deservingness when making use of their entitlements and participating in social assistance programmes. In this way, younger generations in poverty who now have the right to access and receive some degree of welfare support can keep their respectability by highlighting the possession of an active and entrepreneurial disposition. This key disposition or welfare habitus allowed them to differentiate themselves from passive and unproductive welfare beneficiaries, and from the lazy and dishonest poor who make use of welfare but without being in real need. These dynamics of identification and social differentiation seem to indicate the type of "welfare citizenship" being experienced and forged among younger generations in poverty in the country who make systematic use of welfare programmes, although more empirical research is needed to confirm these preliminary findings.

As identified at the beginning of this chapter, the main question of this research was to determine whether and to what extent have social assistance policies contributed to enhancing the citizenship status of "the poor" in Chile? Based on this research, it is possible to conclude that more than enhancing the citizenship status of the poor, the current expansion of social assistance policies in Chile has implied a welfare inclusion of groups living in poverty under a "conditional citizenship status". Indeed, it is a conditional status because the terms and

conditions of inclusion applied to welfare beneficiaries participating in short-term social assistance programmes and receiving monetary benefits, apart from being modest, only last for a limited period of time and are always conditional on people remaining in a state of extreme poverty. Conditionality that contradicts the key formula to overcome poverty in the country which as identified in this research is based almost entirely on the efforts and initiatives of the poor. Under this logic, being a “good welfare citizen” implies to meet such conditions, being able to regard entitlements as “opportunities” to demonstrate people’s merits. As such, the meritocratic orientation guiding several social assistance programmes in Chile expects active and committed participation from welfare beneficiaries in order to enhance their entrepreneurship capacities. However, the practical functioning of the methods of targeting and selection in use in the country do not reward the achievements of the poor since signs of socio-economic advancement among the welfare poor lead to exclusion from welfare support. Such a punitive and perverse logic of social assistance reflects the residual and subsidiary principles underlying the organisation of and role played by social assistance under the current neo-liberal welfare regime in place in the country. Under this regime, social assistance is residual and contingent on people’s extreme levels of poverty, which in a middle-income country like Chile does not represent the type of welfare support that average citizens require and probably expect from the state. Overall, if under the current welfare regime of the country social citizenship and welfare rights are not guaranteed as an unconditional entitlement for the vast majority of the population, then the same is true for the poor, even if the expansion of targeted social assistance policies and benefits suggests otherwise.

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