

SOCIAL POLICY AND VOTE IN BRAZIL

Bolsa Família and the Shifts in Lula's Electoral Base

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Abstract: The electoral implications of conditional cash-transfer programs have been widely debated in recent years. In the particular case of Brazil, analysts have argued that the social policies that President Lula da Silva's first government implemented enabled the Workers' Party to broaden its electoral clientele from middle-class and highly educated voters to low-income and poorly educated individuals from the Northeast. The conditional cash-transfer program known as Bolsa Família (BF) is said to have played a key role in this shift of electoral support and to have worked as a powerful clientelistic tool for Lula. Using survey data, this article challenges this view by showing that, despite changes in the profile of Lula's supporters, the BF program cannot account for them. Poor voters vote differently across regions; BF recipients were already Lula voters in 2002 and cast ballots for him during his reelection at the same rate as nonrecipients.

INTRODUCTION

The Workers' Party (Partido dos Trabalhadores, or PT) grew out of a coalition of unions, social movements, intellectuals, and left-wing members of the Catholic Church (Keck 1992; Meneguello 1989). It criticized the status quo and embraced a platform of radical change with a view to lessening social injustice. The word *socialism* could be read in several party documents. The party's main leader—Luiz Ignácio “Lula” da Silva—relentlessly emphasized the need for structural changes, such as sweeping land-reform measures and the expansion of the workers' rights, among other things, as ways to overcome Brazil's appalling record of inequality (Amaral 2003; Azevedo 1995; Gurgel 1989; Sader 1998). The party's electoral basis reflected this platform. However, since 1988, upon taking up local, gubernatorial, and especially federal administrations, the party and its leaders are thought to

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have undergone a process of traditionalization of their ideology and practices (Couto 1995; Jacobi 1994). Moving away from the original opposition role at all levels of government is said to have led to visible ideological moderation (Hunter 1997; Samuels 2004a).

Did gaining power in government—and controlling the presidency, in particular—correlate with any changes in the basis of electoral support for the Workers' Party's candidates? When it comes to Lula voters in particular, an increasing number of studies suggest that, indeed, the electoral base shifted between 2002 and 2006. It ceased to be centered in the Southeast of the country (Brazil's most economically vibrant region) and around individuals in the upper echelons of the educational pyramid (Carreirão 2002b; Hunter and Power 2007; Samuels 2008). A key explanatory factor in most of these arguments is the impact of the Bolsa Família (BF) initiative, a cash-transfer program that provides financial resources to poor families on condition that their members fulfill certain obligations pertaining to school attendance and health care and nutrition for children and expectant or nursing women (Hall 2006; Rocha 2008).

Bolsa Família, or "family grant," is said to have played a key role in Lula's 2006 reelection and in the transformation of his traditional base of electoral support (Freitas 2006; Marques and Mendes 2006, 2007; Moura 2007). According to Hunter and Power (2007, 24), "Lula's victory in 2006 may well go down in history for its association with the Bolsa Família." Similarly, Zucco (2008, 45) argues that "the unprecedented scope of the Bolsa Família, along with the government marketing and ability to claim credit for it strengthened the electoral returns it reaped from the programme." Nicolau and Peixoto (2007, 17) point out, "We could think that the public policies implemented [the BF] did not alter the pattern of Lula's vote. . . . But . . . this is not what happened." Soares and Terron (2008, 298) agree with these assessments and add that participation in Bolsa Família was "the factor that weighted the most in the explanation of [Lula's] local vote." Furthermore, Bolsa Família is also thought to have worked as a highly effective clientelistic tool. Through his social policy—the argument goes—Lula garnered the support of the poor (especially from the Northeast of Brazil), causing a significant shift in his electoral clientele. In fact, Hunter and Power (2007, 9) note that "this is yet another unfolding of the old story of using the government to build clientelistic support."

Most of the literature on changes in Lula's support base and the impact of Bolsa Família work with aggregate data. Voters' motivations are not known. The latter are derived from the aggregate electoral results of the cities in which they voted. Thus, cities in which there is a high proportion of BF recipients and in which Lula obtained a large number of votes in 2006 are presented as evidence that the program beneficiaries voted for Lula, or shifted their allegiance to him, in response to the social benefits they received. Needless to say, some of these analyses are not immune

from the problem of ecological fallacy, which occurs under the assumption that every single member of a group shares the behavior or a feature found among most members of the same group (Robinson 1950).

This article challenges these explanations on at least three grounds. First, I argue in favor of the importance of using survey data to better understand the changes in Lula's electoral base instead of deriving voting preferences from aggregate electoral results. Second, individual-level data are especially important for assessing whether *Bolsa Família* did have a prominent role in changing the composition of Lula's original group of supporters. The survey used here—the 2007 Latin American Public Opinion Survey in Brazil (LAPOP-Brazil)—comprises individuals who are BF recipients. Thus, we are able to focus on their specific electoral behavior and to analyze whether they changed their allegiance from other parties in 2002 to Lula's PT in 2006. Finally, most of the literature focuses on the modifications in Lula's electoral support between the 2002 and the 2006 presidential elections. This is problematic, as a larger analytical time frame is necessary to verify whether significant transformations in Lula's electoral base did not occur before he became president of Brazil, when Lula was still in the opposition and, therefore, could not make use of purportedly clientelistic tools to earn the support of some social segments.

With those considerations in mind, I proceed as follows. The first section of this article discusses the broader issue of class voting and its complexity in Brazil. In the second section, I then describe Lula's base of support. The third section summarizes several hypotheses about the changes in the profile of Lula's voters, and the fourth section tests them using the 2007 LAPOP-Brazil survey. The data presented here contradict some of the current hypotheses about the impact of *Bolsa Família* on Lula's electoral support. First, the comparison of the profile of Lula voters in the five presidential electoral cycles in which he participated (1989, 1994, 1998, 2002, and 2006) reveals that his quest to go beyond his and his party's traditional base has been in course since at least 1994. The shift in Lula's electoral base might have been more dramatic in 2006 than in 2002, but it was under way much earlier than that. Second, the impact of *Bolsa Família* on Lula's vote in 2006 was somewhat different from what the literature assumes it to have been. This article shows that (1) BF recipients and nonrecipients were equally as likely to have voted for Lula in 2006; (2) BF beneficiaries were already Lula supporters in 2002; and (3) with a focus on the electoral behavior of the poor across distinct regions of Brazil (the prime targets of this conditional cash-transfer program), the BF program policy has had different impacts on the vote. Last but not least, most of the literature ignores and, therefore, grossly underestimates the impact of Lula's other social policies on his 2006 vote. Older Brazilians, a group traditionally more resistant to Lula, supported his reelection massively.

Besides challenging the view that Bolsa Família is merely a clientelistic program, this article also reflects on the constraints that electoral politics pose on ideological radicalism and whether, under democratic regimes, opposition parties can ever accede to government without garnering the support of a broader electoral clientele through the moderation of their platforms.

IDEOLOGICAL MODERATION: THE IRON LAW OF ELECTORAL POLITICS?

Could Lula have won the presidency in 2002 and been reelected in 2006 without broadening his appeal to include a more encompassing electoral clientele? Most likely not. To win the presidency in a large and multifaceted country like Brazil, which has a highly fragmented class structure, a candidate has to have a good showing across quite a few demographic indicators. The odds are against candidates who cater exclusively to very specific class segments of the Brazilian society. However, does this mean that Lula and the Workers' Party had to necessarily tone down their strong original class appeal with a view to becoming more attractive to a greater number of voters? If one looks at the experience of most countries in Western Europe, one would say yes—ideological moderation seems to be a key ingredient for electoral success at the national level. The long-term historical trend in those countries attests to that.

In Western Europe at the turn of the nineteenth century, the issues of class and vote were intimately connected. Opponents of the expansion of the suffrage warned that the transformation of the incipient and ever-growing working class into voters could lead to the destabilization of the extant social order. Workers could make use of their “paper stones” to subvert a class structure that they perceived as unjust. The removal of income-based prerequisites to political citizenship, however, did not result in electoral socialism. As Przeworski and Sprague (1986) have highlighted, it turned out that in almost no Western European country manual workers were numerous enough to catapult into power political parties whose platform challenged the capitalist system in its economic fundamentals. Nonetheless, class did transform itself into a key organizing axis of party politics and electoral competition in a large number of countries in Western Europe (Clark and Inglehart 1991; Lipset 1981). Lipset and Rokkan (1967) even pointed out to the “freezing” of the Western European party systems, emphasizing that the political parties and their ideologies, especially their class-related platforms, had become older than the national electorates of those countries. Thus, the voting patterns from the 1920s were similar to those of the 1960s. This continuity also meant that the class cleavage—along with polarizing elements of the social structure, such as religion, for instance—remained defining principles of the political system.

After World War II, and especially when the full-blown consequences of the rise of postindustrial societies (Bell 1973; Inglehart 1990) became visible, the increase in the complexity of capitalist economy fragmented the class structure even further and diversified even more the tactical and strategic interests of the variegated social segments. These changes had rippling effects on electoral preferences, adversely affecting socialist and labor-based parties (Panitch and Leys 2001). Not only did electoral preferences metamorphose in response to, for instance, greater social mobility, but also the political parties themselves modified their strategies to cope with the changes in the macrosocial structure. As Kirchheimer (1966) noted, parties adapted to this new environment by moderating their ideological appeal with a view to gaining the support of a wider array of social groups, thus becoming the so-called catchall parties. In the context of Western Europe, it became increasingly visible that the most electorally successful political parties were those that catered to multiple social constituencies, that is, those that refrained from trying to become the political vehicle of specific social classes. This trend of "catchallism," along with the deideologization that it entails, became so prevalent that certain authors pointed to the decline of class voting (Clark, Lipset, and Rempel 2001; Dogan 2002; Lipset 2001), arguing, among other things, that postmaterialist concerns had engendered new organizing principles in the political system (for a summary of key arguments of the antideclinist literature, see Hout, Brooks, and Manza 2001; Weakliem 2001).

In Brazil, the emergence of the Workers' Party in the final moments of a twenty-one-year-old dictatorship was hailed as a belated but important and promising development, dramatically changing the party system landscape, which had earlier been portrayed as evidence of Brazil's political underdevelopment (Lamounier and Meneguello 1986; Mainwaring 1992, 1995). The PT was viewed as a genuine mass-based political party, with a legion of followers and a mass of loyal and devoted militants, a highly developed internal organization, and deeply ingrained tentacles throughout organized civil society (Keck 1992; Meneguello 1989). It advocated and, once at the helm of local governments, implemented groundbreaking procedures of democratic governance, such as participatory budgeting, which involved the citizenry in several important phases of public policy making (Abers 2000; Avritzer and Navarro 2002; Baiocchi 2005; Nylen 2003; Wampler 2007). Moreover, in opposition to the corrupt and pork-barrel-driven political parties of Brazil, the PT embodied ethics and transparency in politics. Its internal process of selecting leadership and candidates was considered highly democratic and inclusive.¹ Finally, the party's high degree of internal discipline manifested in its represen-

1. As a testament to PT's inclusive and democratic stand, in 2006, one of the candidates in São Paulo from the Workers' Party was a homeless person. He was provided with the

tatives' behavior in Congress. The PT's elected officials were among the most disciplined in the House and the Senate, and the ones least likely to change their party affiliation (Melo 2000, 2004; Novaes 1993; Rodrigues 2002; Sader 1986).

The presence of the PT in the electoral arena also affected the ways Brazilians relate to their party system. The levels of party identification are very low in Brazil.² However, among those who do declare a party identification, more than half identify themselves with the Workers' Party (Samuels 2004b). Furthermore, the PT also structures the vote in another way. A considerable number of individuals decide their vote based on an anti-PT stand: they give their ballots to the candidates best able to defeat the Workers' Party's candidates (Carreirão and Kinzo 2004). Hence, there is no denying that PT's emergence did significantly change the dynamics of the current Brazilian party system.

However, has the mass-based Workers' Party been able to mobilize its supporters along class lines? Not really—and that was to be expected. At least two factors help explain that pattern. First, Brazil's class structure is extremely fragmented (Boito 2007). Not only is it split among several different class fractions (Weber 1971, 1978); it is also highly unequal. Brazil has among the highest levels of income concentration worldwide. Second, because of historical and institutional factors, Brazil's party system also presents a high level of fragmentation. There is a plethora of party labels to the right of the Workers' Party, as well as alternatives even more radical on its left (Mainwaring 1995).

When it comes to competition for the presidency, there has never been separation between Workers' Party's voters and Lula voters: Lula ran as the PT's candidate in all electoral cycles since the resumption of presidential elections in Brazil in 1985. Lula was the party's candidate on five occasions: 1989, 1994, 1998, 2002, and 2006. In addition, some authors have emphasized that there are differences in the profile of the voters who have chosen Lula and those who have voted for PT congressional candidates—that is, Lula's voter base has changed and is different from congressional returns for the PT (Samuels 2004b). In general, Lula's voters have been characterized as highly educated individuals, male, young,

party's official support and resources (personal interview with the Workers' Party Secretary, João Flor, June 27, 2007, São Paulo).

2. These considerations apply to the existing party system. Lavareda (1991), for instance, showed that there was an ongoing growth in the levels of identification with the parties from the party system that existed between 1946 and 1964, before it was aborted by the 1964 coup. Similarly, the surveys carried out by Lamounier (1989) revealed that, especially after 1974, there was a growing identification of the Brazilian electorate with the pro-democratization party (Party of the Brazilian Democratic Movement, or PMDB), which played an important role in decreasing the legitimacy of the authoritarian regime. I thank a reviewer for helping me clarify this point.

and predominantly from the Southeast region and urban areas (Almeida 1998; Center for the Study of Public Opinion [CESOP] 2002; Samuels 2004b, 2006). Despite Lula's (and PT's) strong class appeal, however, most analyses have not found a clear class component among his voters up to 2002 (Balbachevsky and Holzhacker 2007). Moreover, none of the professional and nonprofessional occupations, including unskilled and skilled manual labor, show a statistically significant relationship with voting for Lula (Samuels 2004b). On the contrary, in 1989, Lula had a disastrous showing among the poor. The latter voted massively for Lula's key opponent, Fernando Collor de Mello—usually viewed as a right-wing politician, stemming from an affluent family from one of the poorest and most socially unequal regions (the Northeast) and, once president, a vital force in the initiation and implementation of market-oriented reforms in Brazil (Singer 1990). The low-income voters remained apart from Lula's candidacy also in 1994 and 1998. On those two occasions, Lula ran against Fernando Henrique Cardoso, who is known as the politician responsible for implementing the plan that ended hyperinflation in Brazil (Almeida 1998; Carreirão 2002; Meneguello 1995). Traditionally, Lula voters have also been described as highly informed about politics, displaying a high level of electoral and nonelectoral political participation, and as individuals clearly identified with the left spectrum of the Brazilian party system (Samuels 2004b). Thus, they were thought to be highly ideological voters for whom the PT's historical platform, with claims for social justice and profound changes in the status quo, was what mattered.

This was the backdrop against which the results of the 2006 presidential elections, in which Lula sought and won reelection, have been interpreted. No sooner had the last ballot been cast then the media were reporting that Lula had received a huge boost in support from areas with large concentrations of poor voters, especially the Northeast. Needless to say, most analysts not only portrayed this as a significant shift in his electoral basis but also immediately pointed to an explanatory factor that they deemed fundamental: *Bolsa Família*. The large influx of votes coming from the poorest areas of the country, where the least educated of the Brazilians reside, was portrayed as evidence that Lula's social policy was an enormous cash cow for the Workers' Party. According to Hunter and Power (2007, 19), "The electoral results testify to the wisdom of Lula's acceleration of social policy in the second half of his term." Furthermore, this transformation of Lula's base of electoral support was construed as a sign that the Worker's Party not only completely abandoned the ideals of structural social transformation but also deliberately chose to expand its electoral clientele through ways that some find deplorable (given the PT's history): the tailoring and implementation of social policies with the ultimate goal of maximizing electoral returns at the ballot box. In other words, Lula's poverty-alleviation program was taken as the crowning of

the PT's traditionalization. It became a party as clientelistic as any other party in Brazil. Instead of holding on to its ideological positions as it had done in the past, the party is now thought to focus on vote-maximizing strategies, regardless of the costs (for a summary of the corruption scandal known as *mensalão*, or monthly stipend, see Pereira, Power, and Raile 2008). If, because of its ideological purism and organizational style, the PT was once considered an anomaly in the Brazilian party system (Keck 1992), it is now portrayed as one and the same (Hunter 2007).

This article takes issue with some underlying aspects supporting the argument about the traditionalization of the Workers' Party. It does so through the analysis of individual-level data. It uses five different national surveys to track the evolution of the socioeconomic profile of Lula supporters for every presidential election since 1989.³ The last of those surveys (LAPOP-Brazil 2007) includes a specific question about whether respondents were Bolsa Família recipients, which enabled me to create the variable BF recipients and to analyze those respondents' electoral behavior in the 2006 and 2002 elections. Hence, I will be able to verify whether BF beneficiaries did in fact change their electoral allegiance from some other party in 2002 to Lula's Workers' Party in 2006. The analysis centers on Lula's voters' income and education (some of the elements conventionally used to assess social class), sex, age and (something important in a country ripe with regional inequalities) region. The goal is not to capture all the elements that over time have fostered an individual decision to vote for Lula for president but to understand whether and how the socioeconomic profile of his voters has changed since 1989. If the view I seek to challenge is correct, then I expect the following:

1. Small changes in the profile of Lula's voters in the four electoral cycles starting in 1989 and finishing in 2002, but large shifts after Lula becomes president (i.e., between 2002 and 2006). The latter should be especially visible when it comes to income and education, which could be taken as proxies for social class.
2. Self-identified Bolsa Família recipients not to have voted for Lula in 2002, given that before that year Lula was an opposition figure and, therefore, could not make use of governmental programs to build up electoral support. Thus, in this case, I expect BF recipients to have voted for candidates other than Lula in 2002.
3. Self-identified BF recipients to display a similar electoral behavior anywhere in the country. If indeed Bolsa Família is an essentially clientelistic
3. All of them are national surveys carried out by major polling firms or universities. The Brazilian Institute of Public Opinion and Statistics (IBOPE) conducted the 1989 survey ($N = 3,650$) used here. Samples for the other surveys are as follows: 1994, DATAFOLHA, $N = 21,292$; 1998, DATAFOLHA, $N = 10,290$; 2002, ESEB (Brazilian Electoral Study), $N = 2,513$; and 2007, LAPOP-Brazil, $N = 1,214$.

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policy, then all BF recipients, regardless of region, should have cast a pro-Lula vote in 2006.

4. The poor from all regions of Brazil, the targets of Bolsa Família, to display a greater likelihood than any other group of voting for Lula in 2006.

THE SOCIOECONOMIC PROFILE OF LULA'S VOTERS OVER TIME AND BOLSA FAMÍLIA'S IMPACT

With a view to capturing any changes in the socioeconomic profile of Lula voters over time, I ran probit analyses on his vote for the five electoral cycles in which he participated. For each one, I examined the impact of income and education on vote, controlling for sex, age, and region of the respondents. The latter is a dummy variable, with the Southeast as the control group. This design enables us to compare the behavior of voters from other areas of the country against the backdrop of the Southeast, which was the Workers' Party's birthplace and has been known as one of its strongholds. Table 1 presents the results of the analysis.

The data show that, despite some visible changes, there are some lines of continuity in the socioeconomic profile of Lula's voters over time. First, there is a clear gender gap. From the 1989 inaugural (direct) presidential election to the 2006 electoral cycle, keeping all other variables constant, men have been much more likely than women to cast a vote for Lula. The gap ranges from 4.51 percent (in the 1989 election) to 5.62 percent (in the 2002 election) and 6.81 percent (in the 2006 election). This difference might be a consequence of the specificity of the process of economic and social modernization in Brazil. Comparatively, the latter was both very late and very fast and, as a consequence, has disseminated modern values rapidly but unevenly. Hence, there exist pockets of conservatism, traditionalism, and even authoritarianism throughout Brazilian society, which also affect women and their relationship to the political world (Bohn 2008).

Second, younger voters continue to display a greater tendency to vote for Lula. Up to the 2002 election, voters between the ages of sixteen and twenty-four accounted for the greatest proportion of Lula supporters. At least two factors account for this disproportionate support for Lula. First, younger voters are thought to be more progressive than older voters, and consequently more inclined to vote for newer, forward-looking political parties (Heath and Park 1997). Second, in the case of Brazil, individuals in this age category have little (or no) memory of the last dictatorial period (1964–1985). They have come of age in a party system in which the Workers' Party was already a competitor. Thus, their political socialization has been very different from that of older adults and senior citizens, who not only recall the dictatorship but also might remember the democratic breakdown and the party system that preceded it. This group of older

Table 1 Probit on Lula's Vote

Years	1989	1994	1998	2002	2006
Gender ^a	.169** (.050)	.165*** (.020)	.152*** (.027)	.144** (.053)	.199+ (.102)
Age	-.086*** (.019)	-.045*** (.006)	-.054*** (.011)	-.028 (.021)	-.062 (.043)
Income	-.054+ (.029)	-.017+ (.009)	.046** (.017)	-.038 (.038)	-.248** (.074)
Education	.079** (.030)	.201*** (.015)	.045*** (.013)	.045 (.029)	-.244*** (.060)
South	-.382*** (.078)	-.096** (.027)	.098** (.032)	.038 (.075)	-.260+ (.133)
Center-West	-.221* (.104)	-.069* (.031)	-.173** (.061)	-.093 (.108)	-.060 (.171)
Northeast	.170** (.060)	.098** (.029)	-.008 (.036)	.113+ (.063)	.347** (.122)
North	.044 (.113)	.104* (.051)	.014 (.049)	-.070 (.125)	.109 (.212)
Constant	-.812*** (.114)	-1.068*** (.049)	-.766*** (.056)	-.297* (.121)	1.727*** (.269)
N	3,475	18,651	10,256	2,514	800
Pseudo R ²	.031	.019	.011	.006	.074
Prob. > χ ²	.0000	.0000	.0000	.009	.0000
LR χ ²	105.33	399.68	133.79	20.26	73.65

Notes: Standard errors are in parentheses.

^aVariables: Gender: 1 = male; age: 1 = 16–24; 2 = 25–34; 3 = 35–44; 4 = 45–59; 5 = 59+; income: 1 = up to two minimum wages (MW); 2 = 2.1–5 MW; 3 = 5–10 MW; 4 = 10–20 MW; 5 = 20+ MW; education: 1 = illiterate; 2 = up to eighth grade, 3 = high school, 4 = college.

*** $p < .001$; ** $p < .01$; * $p < .05$; + $p < .06$

voters might fear political polarization and be leery of supporting parties that, in their view, could exacerbate the conflict.

Despite this general trend of younger voters supporting Lula, the coefficients for age are not statistically significant for the 2002 and 2006 elections. However, the loss of significance might stem from Lula's visible electoral gains since 1998 among individuals older than thirty-five years. Hence, even before taking office for the first time, the Workers' Party candidate had already made important inroads into the age groups that had supported him the least in his first presidential contest. Figure 1 shows the percentage of respondents who declared a vote for Lula in each electoral cycle over time. At least three observations are worth making. First, in 1989, the relationship between Lula's vote and age was negative in an

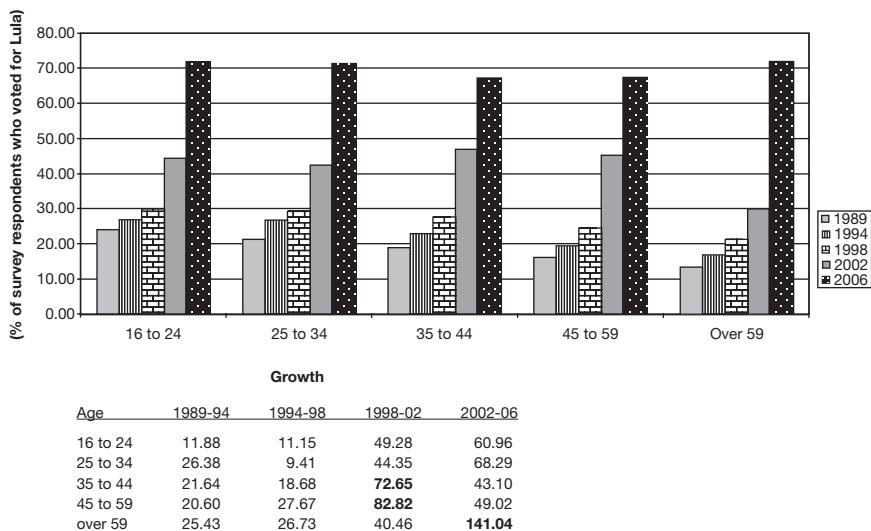


Figure 1 Lula voters by age (1989–2006)

almost perfectly linear way: the older the voter, the lesser was the chance that he or she cast a ballot for the Workers' Party candidate. From 1989 onward, Lula's support grew steadily in all age groups, albeit at different rates. Second, between 1998 and 2002, voters between thirty-five and forty-four years old and between forty-five and fifty-nine years old overcame their initial resistance to Lula and turned out to support his candidacy in great numbers.⁴ In fact, Lula's showing among these two groups increased by more than 75 percent. It is hard to know whether Lula's and the PT's moderation played a role in attracting these voters and/or whether they grew dissatisfied with the main alternatives to the Workers' Party after the end of eight years of a Partido da Social Democracia Brasileira (Brazilian Social Democratic Party, or PSDB) administration (Carvalho 2006). Finally, Figure 1 also reveals something that so far has been missing in most analyses about the electoral impact of Lula's social policy. Senior citizens, who had always been reluctant to vote for the PT's candidate, supported Lula massively during his reelection, that is, when he ran as incumbent.

Since 1996—before the Workers' Party ascension to the presidency—the Brazilian federal government has granted all low-income senior citizens and disabled individuals outside of the labor market the right to receive one minimum wage on a monthly basis. The criteria for eligibility

4. It is important to mention that this shift is not necessarily a by-product of the aging of the electorate. The younger voters in 1989—those between sixteen and twenty-four—were between twenty-nine and thirty-seven years old in 2002; that is, not all of them had moved to the two age brackets mentioned previously by 2002.

in this program are that senior citizens are at least sixty-five years old and that disabled individuals are unable to work for medical reasons. Furthermore, individuals are entitled to the benefit only if they have a per capita family income less than one-fourth of a monthly minimum wage.⁵ Unlike Bolsa Família, in which the expectation is that individuals and families will eventually be lifted out of poverty and outgrow the need to receive conditional cash transfers, the federal government categorizes the participants of this program as permanent beneficiaries (Social Development Ministry [MDS] 2009). Thus, the name of this social policy: *Benefício de Prestação Continuada* (BPC), or Continuous Monthly Benefit.

One aspect of the BPC unknown to most analysts is the size of that program in comparison to Bolsa Família. In 2008, for instance, Lula's administration spent R\$13.8 billion on it, compared with R\$10.6 billion on BF. Thus, in terms of financial transfers, the BPC is a bigger program than BF. The number of BPC beneficiaries, however, is much smaller. By early 2007, Bolsa Família was estimated to have reached 11.1 million families (or 45 million people) in early 2007 (Rocha 2009). The BPC recipients, however, amount to approximately 2.9 million individuals (*Folha de S. Paulo* 2009). This program does not seem to have generated electoral dividends for the Workers' Party. As Figure 1 shows, Brazilians older than fifty-nine years moved from being the age group most resistant to Lula's candidacy in all elections since 1989 to the one that most supported the Workers' Party's candidate in 2006. In fact, a probit estimation (not shown) of the probability of senior citizens voting for the incumbent in 2006, controlling for sex, education, income, and region, reveals that their likelihood of supporting Lula's reelection was 4.99 more likely than that of any other age group. However, given that the BPC has existed since 1996, the results cannot be attributed to the Workers' Party. However, the Lula government's expenses on this program have been increasing steadily. In 2001, BPC payments equaled 0.21 percent of the Brazilian gross domestic product (GDP), but by 2008, they had grown to 0.48 percent (*Folha de S. Paulo* 2009). This growth, nevertheless, occurred mainly in response to the increase in the number of retirees: the 1988 Constitution mandates the BPC as a social policy, not a gift to senior citizens from any specific government.

The Lula administration's major contribution to the interests of the Brazilian elderly is a very comprehensive social policy, embodied in the so-called Statute of the Elderly (Estatuto do Idoso), promulgated on October 1, 2003, under Law 10741 (Casa Civil 2009). The statute is a governmental response to the pressure from senior citizens' organizations and other civil society associations to improve the precarious conditions under which many older adults live in Brazil. About 62.4 percent of senior

5. On February 1, 2009, the minimum wage rose to R\$465, approximately US\$230 (R\$1 ≈ US\$2).

citizens are the main breadwinners in their dwellings, having to support their whole extended family (Brazilian Institute of Geography and Statistics [IBGE] 2000). Furthermore, 45.1 percent of elderly who are heads of their households have a monthly income of up to only one minimum wage. Not only do they lack income; they also live under precarious conditions: 43.2 percent of their households lack an adequate sewage system (IBGE 2000). The Statute of the Elderly is an attempt to start making a dent in old-age poverty. It concedes to any Brazilian older than sixty-five years a monthly minimum wage benefit. Its other important provisions include the hardening of jail sentences for those who commit abuses against senior citizens while taking care of them; incentives for companies to hire older adults; the assignation to the elderly of 3 percent of low-income housing projects sponsored by the federal government; free access to a large number of pharmaceutical drugs and to mass public transportation; and half-price tickets to cultural, leisure, and sports events (Casa Civil 2009, Fonseca and Gonçalves 2003; Saliba et al. 2007). These benefits were instituted in 2003. Thus, it is too early to tell whether and how much they have contributed to decreasing old-age poverty. Nevertheless, it is clear that they had an important electoral impact. The main consequence of this program was that senior citizens overcame their initial resistance to Lula's candidacy and supported his reelection massively. Thus, when it comes to age, Lula has systematically maintained support from younger voters. He made significant headway among other age groups while still a member of the opposition. However, Lula was able to break the reluctance of a particular segment to his name only after being in government.

A third line of continuity comes from the income profile of Lula's voters. The data show that they have never concentrated on the highest income bracket. On the contrary, as figure 2 illustrates, between 1989 and 1998, the PT's candidate did better among the middle classes in Brazil. In fact, in 1998, his best performance was among Brazilians who earned between 10.1 and 20 minimum wages, when he obtained the support of more than one-third of that demographic, which explains why the coefficient for income in that year was positive. In the 2002 election, Lula did exceptionally well among better-off Brazilians, gathering about 38 percent of their support, which he then lost after his first term in office. The data suggest that the wealthier voters who moved to Lula's camp after Cardoso's two terms in office turned away from him during his reelection. Thus, if Lula's public policies (especially in the social realm) did attract some demographics, as some argue, it is also conceivable that other elements of his administration, such as corruption scandals, ostracized other social segments.

There are three interesting aspects about the evolution of the income profile of Lula's voters over time. First, in 2006, Lula's vote was a negative linear function of income: the greater the income, the lesser was the likelihood of someone casting a vote for the incumbent. Second, for the first

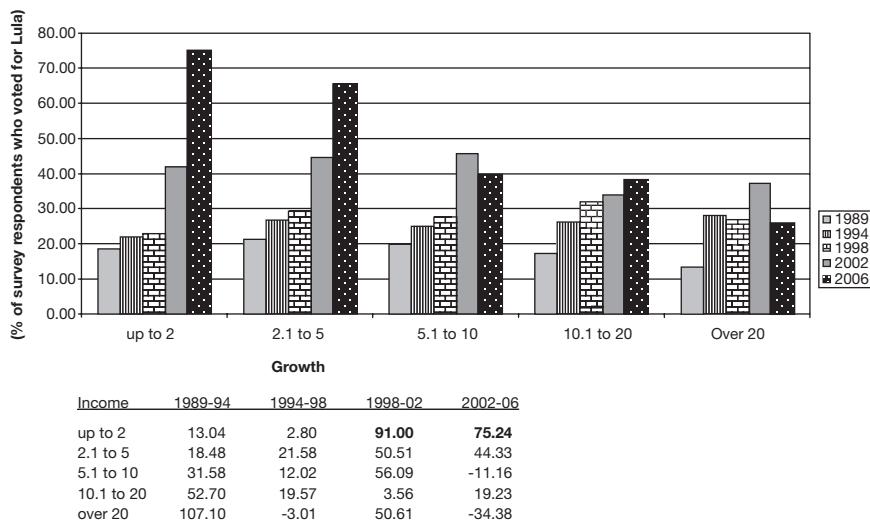


Figure 2 *Lula's voters by income, in minimum wages (1989–2006)*

time, this tendency applied to the middle classes as well. Their support for Lula continued to grow but at a visibly lower rate than that of poorer Brazilians. Third, Lula's voters became more concentrated around the lower end of the income spectrum. In his bid for reelection, Lula won more than 60 percent of the lower middle class (whose income ranges from 2.1 to 5 minimum wages) and more than 70 percent of the poor (who earn up to 2 minimum wages). That was no mean feat. The Workers' Party's candidate was finally able to attain the backing of social groups that, in 1989, were very hostile to his candidacy (Singer 1990). What is most interesting, however, is that Lula's inroads with poor voters started in 2002, before winning a government seat. In fact, the percentage of votes he obtained among the poorest Brazilians almost doubled between 1998 and 2002, when the PT took up its place in the federal government. There is no denying that Lula's growth in this segment between 2002 and 2006 was astonishing. However, the Workers' Party had started to make significant headway with this group when it was still in the opposition. Thus, the numbers for income also challenge the view that modifications in Lula's base of electoral support stem exclusively from governmental programs. I return to this point later.

When it comes to education, the 2006 election represented a big rupture. Until 2002, the bulk of Lula's voters had belonged to the higher echelons of the educational pyramid (figure 3). In fact, between 1994 and 2002, there was an almost perfect linear association between education and voting for Lula: the higher the educational level, the greater the probability an

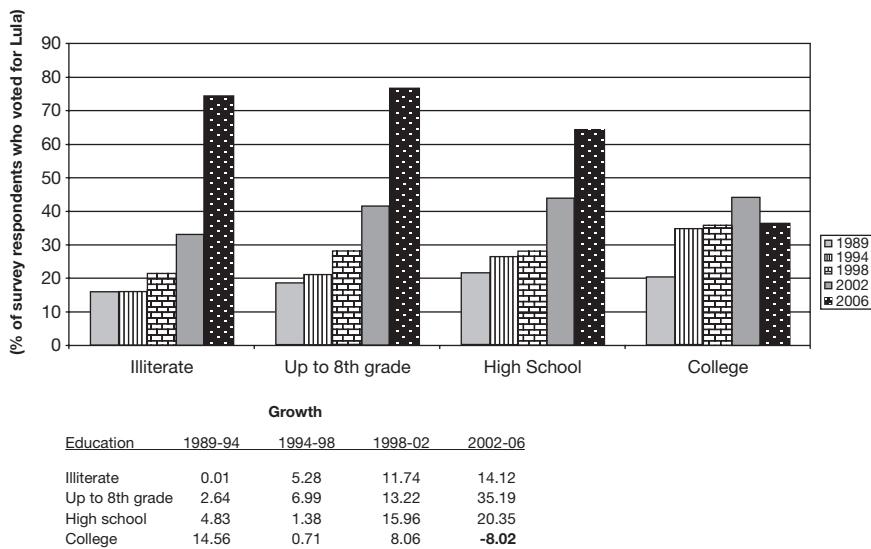


Figure 3 *Lula's voters by education (1989–2006)*

individual would cast a ballot for the Workers' Party's candidate. The re-election contest inverted that trend, as other authors have noted (Samuels 2008; Veiga 2007). In 2006, highly educated individuals were least likely to choose Lula. Actually, Lula even lost ground among college-educated voters. Finally, the data also show that Lula's greatest growth among Brazilians with fewer years of formal schooling occurred after he was president and, thus, that growth is linked to his performance in the highest office.

The numbers for income and education depict an apparently contradictory trend. If it is correct that Lula won support from the lower classes in response to *Bolsa Família*, then the PT candidate should have obtained the support of low income and poorly educated individuals in 2006 (i.e., after being in government for four years). However, the data for income show that Lula's support grew among the poor much earlier than 2006—it happened even before he became president. One explanation is the increase in the disconnect between education and income over time in Brazil. In 1989, the variation in education accounted for one-third of income variation, but in 2006, it explained less than one-tenth of it (table 2). This difference indicates that educational attainment nowadays does not translate into income gains as well as it did in the recent past. Most likely, this disconnect stems from the fact that the overall increase in educational level—especially following the massive expansion of higher education in Brazil—paralleled an increase in the size of the informal labor market and

Table 2 OLS Regression of Education on Income

Year	Income	Constant	Adj. R ²	N
1989	.558*** (.014)	.447*** (.041)	.301	3,475
1994	.811*** (.010)	.581*** (.026)	.244	18,678
1998	.347*** (.006)	1.029*** (.018)	.220	10,257
2002	.288*** (.014)	.569*** (.014)	.150	2,514
2006	.202*** (.021)	.752*** (.071)	.081	1,022

Notes: Standard errors are in parentheses.

*** $p < .001$; ** $p < .01$; * $p < .05$

in the number of precarious jobs. Thus, more and more people are progressing in the educational hierarchy without experiencing similar gains in terms of wealth. This disconnect in multifaceted and highly unequal countries such as Brazil requires new ways to study the political and electoral implications of different types and degrees of poverty: those that conflate low income and low education and those that do not.

Even though the implications of this particularity to the way political parties channel societal interests into the political arena would deserve a study on its own, it is possible to assess whether it has any effect on the profile of the target population of Lula's social programs. Who are Bolsa Família recipients? Do they belong to social segments with conflated low scores for education and income? Or are they just underprivileged but not necessarily insufficiently educated? And how did that profile translate into support for Lula before and after he became president?

When it comes to the profile of participants in Lula's now famous social policy, several aspects are noteworthy. First, women and men are equally as likely to receive Bolsa Família (see table 4). There are no statistically significant differences between sexes. This finding runs counter to the commonsensical view that the program's participants are principally women. Second, BF beneficiaries are typically younger individuals. Someone between sixteen and twenty-four years is 10 percent more likely to be part of the program than is someone older than fifty-nine. Similarly, the chance of a person between the ages of twenty-five and thirty-four being a BF recipient is 6.6 percent greater than that of a senior citizen. This is expected, as persons older than fifty-nine years may be entitled to BPC; when that is the case, they are ineligible for Bolsa Família (World Bank 2001). Third,

the negative signs for the South, Northeast, and North suggest that individuals from those regions are less likely to enter the program than counterparts in the Southeast, but none of the coefficients reaches statistical significance. Thus, being from a specific region of the country does not affect someone's likelihood of being accepted into the program. This is also an important finding, given the current charge that Lula's administration specifically targeted some regions to build up electoral support (Zucco 2008). Fourth, even though the coefficients are not significant, the positive signs for the educational dummies indicate that BF recipients have a very low likelihood of having a college education, which is also expected. In fact, the lower the educational level, the greater are the chances of someone being part of BF: 11 percent for those who are illiterate, 6.7 percent for those between one and eight years of formal schooling, and 4.1 percent for those who have completed high school. Fifth, the data for income reveal that people with income between 2.1 and 5 minimum wages are more likely to receive *Bolsa Família* benefits than individuals who receive up to 2 minimum wages. This information sounds counterintuitive. However, bear in mind that the data presented here are based on individual income, and the BF program uses per capita family income as its qualifying criterion (Rocha 2009). Thus, individual income is just one component in the assessment of a family's poverty level; the other important element is family size. An alternative explanation is that the program still has operational problems, which lead to the concession of benefits to families that in fact should be excluded from it (Rocha 2008).

Thus, *Bolsa Família* recipients tend to be young individuals who are poorly educated and primarily low-income voters. How did this profile translate into support for Lula during his reelection? Did the beneficiaries change their allegiance, voting for somebody else in 2002 and for Lula in 2006? The data in table 3 address these questions.

First, *Bolsa Família* recipients were already Lula voters in 2002. When one controls for the effects of sex, age, income, and region, it is clear that BF recipients had a 14.9 percent greater chance than nonrecipients of having voted for Lula in 2002. This finding calls into question claims that *Bolsa Família* and other social programs of Lula's administration resulted in their participants moving their votes from other parties to the PT. Second, there is no statistically significant difference between being and not being a BF recipient and having voted for Lula in 2006. Beneficiaries and nonrecipients were equally as likely to have cast a ballot for the Workers' Party's candidate when he sought his reelection. This is true both nationally (probit analysis not shown) and across regions. Finally, the same dynamic is visible when in analyses of the electoral behavior of the poor (i.e., those in the lowest income bracket who earn up to two minimum monthly wages). There is no statistically significant evidence that they were more likely to vote for Lula. In fact, poor voters from different regions of the

Table 3 Probit of Being a Bolsa Família Recipient on Lula's Vote in 2002 and 2006

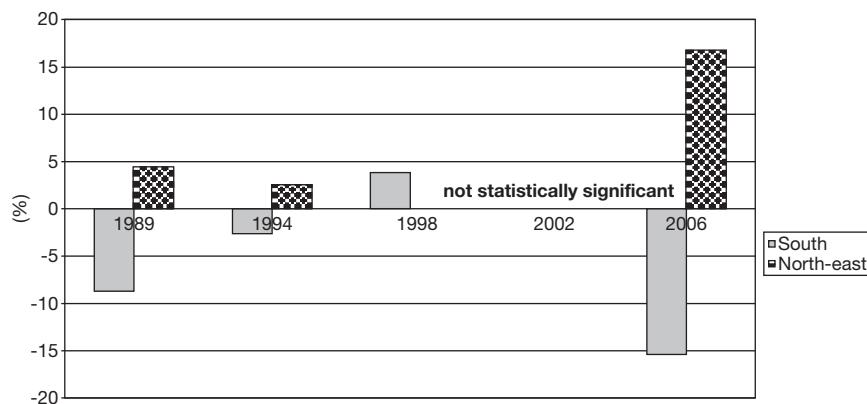
Lula's Vote	2002	2006
Gender	-.096 ^a (.140)	.200+ (.102)
Age	.142* (.060)	-.061 -.248** -.086
Income	(.111) .102	(.074) -.243*** -.106
Education	(.085) -.106	(.060) -.262*
South	(.200) -.184	(.133) -.061
Center-West	(.245) -.268+	(.171) .345**
Northeast	(.157) -.368	(.122) .106
North	(.289) .560*	(.212) -.055
Bolsa Família recipient	(.250) .169	(.148) -1.728***
Constant	(.360)	(.269)
N	448	800
Pseudo R ²	.049	.074

Notes: Standard errors are in parentheses

^aVariables: Gender: 1 = male; age: 1 = 16–24; 2 = 25–34; 3 = 35–44; 4 = 45–59; 5 = 59+; income: 1 = up to two minimum wages (MW); 2 = 2.1–5 MW; 3 = 5–10 MW; 4 = 10–20 MW; 5 = 20+ MW; education: 1 = illiterate; 2 = up to eighth grade, 3 = high school, 4 = college; Bolsa Família recipient = 1.

*** $p < .001$; ** $p < .01$; * $p < .05$; + $p < .06$

country had different electoral dispositions toward Lula when he ran for reelection in 2006 (figure 4). Whereas poor voters from the Northeast were 17.6 percent more likely than the general population to vote for Lula, their counterparts in the South were 17.5 percent less likely than other Brazilian voters to choose the PT's candidate for the presidency. Furthermore, this trend is visible in other elections; that is, the vote of the poor has not been homogeneous across regions. Not only are there different types and degrees of poverty, as mentioned earlier; the electoral behavior of poor voters



*Figure 4 Probability of a Lula's vote in 2006 among individuals earning up to 2.1 minimum wages, by region**

* Probit analysis on voting for Lula, controlling for gender, age and education. Only the regions for which the coefficients are statistically significant are shown.

presents considerable variation. Hence, the idea that BF and other social policies delivered the poor's vote to Lula in 2006 needs to be reconsidered.

CONCLUSIONS

This article tackled the incredibly complex problem of assessing the electoral ramifications of the conditional cash-transfer programs in highly unequal societies in the global South, such as Brazil. One of the article's merits is its attempt to go beyond deriving an individual's actions and especially motivations from aggregate electoral results. The use of individual-level data is of paramount importance for the academic community to evaluate how social policies affect citizens' perceptions of the political universe and influence their specific actions in the electoral arena.

The current claims in the literature about the conditional cash-transfer program in Brazil are twofold. First, it was deliberately devised for electoral purposes. The Workers' Party's social policy was implemented and administered with a view to maximize the party's and Lula's electoral prospects (Sewall 2008). Second, the change in electoral allegiance of Bolsa Família recipients was a key ingredient in Lula's reelection, which transforms the program into a powerful clientelistic tool (Hunter and Power 2007).

This article did not center the analysis on the process of implementation and expansion of Bolsa Família. It cannot verify, for instance, whether there is clientelism or nepotism in the recruitment of potential participants or in the expansion of cash benefits or program coverage. Thus, this article

Table 4. Profile of Bolsa Família Recipients

Male	.035 (.097)
16–24 years old	.482** (.191)
25–34 years old	.325+ (.190)
35–44 years old	.086 (.193)
45–54 years old	.278 (.181)
2.1–5 minimum wages (MW)	.289* (.124)
5.1–10 MW	.162 (.245)
10.1–20 MW	.162 (.245)
20+ MW	.389 (.439)
Illiterate	.495 (.382)
Up to eighth grade	.364 (.300)
High school	.205 (.296)
South	−.039 (.145)
Center-West	.190 (.174)
Northwest	−.094 (.119)
North	−.349 (.250)
Constant	
−1.859***	(.349)
N	1,210
Pseudo R ²	0.022

Notes: Standard errors are in parentheses.

*** $p < .001$; ** $p < .01$; * $p < .05$; + $p < .06$

cannot fully address the first claim. When it comes to the second claim, the analysis carried out here has shown that there indeed are differences in the profile of President Lula's supporters during his reelection in 2006 and those who voted for him in 1989, when he was a challenger. However, the changes in his electoral base were gradual: Lula increased his support among several demographics little by little in every single electoral contest in which he took part at the federal level. Second, some of the biggest changes occurred between the 1998 and 2002 elections, not when Lula sought reelection, which is when the impact of direct cash-transfer programs would be mostly felt. Lula made significant inroads with some age groups (individuals between thirty-five and forty-four years and between forty-five and fifty-nine years) and income segments (people who receive up to two minimum wages) during his election in 2002—before he could make use of the governmental machine to boost electoral support.

Most important, this article reassessed the role of *Bolsa Família* in Lula's reelection. I have showed that BF recipients were already Lula supporters in 2002. Second, in 2006, when Lula ran for the presidency a second time, there was no statistically significant difference in the probability of a BF beneficiary and a nonbeneficiary voting for the Workers' Party. Thus, claims that this specific program of Lula's social policy amounts only to clientelism need to be revisited.

In addition, countries with a highly fragmented class structure experience different types of acute poverty (e.g., in rural zones, small cities, metropolitan areas), which result from different combinations of income and education (World Bank 2001). Thus, it is fallacious to assume that, in a country as multifaceted as Brazil, the poor are a socioeconomically homogeneous group and behave uniformly in the political arena. This article's most important finding is that there is no similarity in the electoral choices of the disadvantaged in Brazil. This result challenges the view that the poor as a segment can easily fall prey to opportunistic policies that aim to obtain their vote in exchange for their participation in social programs. This article has shown that the poor's electoral behavior presents considerable regional variation in Brazil. Therefore, if the BF is exclusively a clientelistic tool, as some allege, then it is a deficient instrument: it does not produce the intended effect in some parts of the country.

Finally, most academic works have overlooked the most visible change in Lula's basis of support from 2002 to the following electoral cycle, when he sought reelection: the (statistically significant) large increase in support from senior citizens. The latter went from being a demographic group most reluctant to vote for the Workers' Party candidate in 1989 to one that rallied behind him the most during his fight for reelection. This change cannot be entirely attributed to the BPC social program, given that its implementation in 1996 predates Lula's administration. However, it could be linked to the expansion of BPC under Lula and especially to the imple-

mentation in 2003, when the Workers' Party was already at the helm, of the Statute of the Elderly, which resulted in the expansion of the rights of the elderly and the services offered to them.

One last weakness of the literature that considers programs such as Bolsa Família quintessentially clientelistic instruments deployed as part of vote-maximizing strategies by opportunistic parties is that it overlooks how much the programs have actually changed people's lives. Income inequality as measured by the Gini coefficient fell from 0.593 to 0.569 between 2001 and 2004 (Institute of Applied Economic Research [IPEA] 2007). In 2006 alone, 6 million Brazilians were lifted out of poverty (Martins 2007; Neri 2007). The more than thirty-one social programs implemented under Lula's administration—some of them continuations of policies initiated by the Cardoso government—have significantly reduced infant mortality and malnutrition, increased food and nutrition security for millions of families, and improved the level of school attendance of the children of the disadvantaged (Rocha 2009). As others have pointed out, some of these programs need to enhance their oversight mechanisms to curb abuses where they exist (Rocha 2008). Similarly, new investments to ameliorate the quality of the social and health services provided to recipients of Bolsa Família and other programs are needed (Sewall 2008). However, there is no denying that these social policies contributed to dramatic changes in the lives of many Brazilians. Hence, instead of considering them pure clientelism and vote buying, perhaps one needs to rethink the electoral behavior of these programs' beneficiaries in terms of retrospective and prospective voting. The disadvantaged in Brazil may be voting in every election for those who they believe will improve their chances of being productive members of the society, raising their children, and leading a better life.

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