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CASH TRANSFER PROGRAMS IN BRAZIL: THE NEW BOLSA FAMÍLIA AND ITS PREDECESSORS

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Cash transfer programs in Brazil: the new Bolsa Família and its predecessors

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November, 2023

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ACRONYMS

AB	Auxílio Brasil (cash transfer program Brazil Aid)
AE	Auxílio Emergencial (Emergency Aid)
BC	Benefício Complementar (Supplementary Benefit)
Bcomp	Benefício Compensatório de Transição (Transitional Compensation Benefit)
BET	Benefício Extraordinário de Transição (Transitional Extraordinary Benefit)
BEXT	Benefício Extraordinário (Extraordinary Benefit)
BPC-Idosos	Benefício de Prestação Continuada para pessoas idosas (Continuous Cash Benefit Program for the eldery)
BPI	Benefício Primeira Infância (Early Childhood Benefit)
BRC	Benefício de Renda de Cidadania (Citizens' Income Benefit)
BSP	Benefício de Superação da Extrema Pobreza (Ending Extreme Poverty Benefit)
BVF	Benefício Variável Família (Family Variable Benefit)
CadÚnico	Cadastro Único (Unified Registry for social programs)
CAIXA	Caixa Econômica Federal (Federal Savings Bank)
DATAPREV	Empresa de Tecnologia e Informações da Previdência Social (Social Security Information Technology Company)
DPDI	Serviço de Proteção Social Especial para Pessoas com Deficiência, Idosas e suas Famílias (Basic Social Protection Homecare Service for People with Disabilities and the Elderly)
EP	Extreme Povetry
INSS	Instituto Nacional do Seguro Social (National Social Security Institute)
IPCA	Índice Nacional de Preços ao Consumidor Amplo (National Broad Consumer Price Index)
LA	Liberdade Assistida (Probation)
LOA	Lei Orçamentária Anual (Annual Budget Law)
MDA	Ministério do Desenvolvimento Agrário e Agricultura Familiar (Ministry of Agrarian Development and Family Agriculture)
MSE	Serviço de proteção social a adolescentes em cumprimento de medida socioeducativa de Liberdade Assistida e de Prestação de Serviços à Comunidade (Social Protection Service for Adolescents under Probation and Community Services Measures)
n-PBF	Novo Bolsa Família (New Bolsa Família)
PAA	Programa de Aquisição de Alimetos (Food Acquisition Program)
PAEFI	Serviço de Proteção e Atendimento Especializado a Famílias e Indivíduos (Protection and Specialized Care Service for Families and Individuals)
PAIF	Serviço de Proteção e Atendimento Integral à Família (Protection and Integral Support Service to the Family
PBF	Programa Bolsa Família (Bolsa Família Programme)
PCD	Pessoa com Deficiência (People with Disabilities)
PCF	Programa Criança Feliz (The Happy Child Programme)
PETI	Programa de Erradicação do Trabalho Infantil (Child Labour Eradication Programme)
Procad	Programa de Fortalecimento Emergencial do Atendimento do Cadastro Único (Program for the Emergency Strengthening of the Unified Registry Service)
PSB	Proteção Social Básica (Basic Social Protection)
PSC	Prestação de Serviços à Comunidade (Provision of Community Services)
PSD	Poupança Social Digital (Digital Social Savings Account)
PSE	Proteção Social Especial (Special Social Protection)
PTR	Programa de Transferência de Renda (Cash Transfer Programme)
RF	Responsável Familiar (Head of Household)
RFPC	Renda Familiar Per Capita (Per capita household income)
SAI	Serviço de Acolhimento Institucional (Institutional Shelter Services)
SAR	Serviço de Acolhimento em República (Communal Housing Services)
SCE	Serviço de proteção em situações de calamidades públicas e de emergências (Protection services in a declared public calamity and emergencies)
SCFV	Serviço de Convivência e Fortalecimento de Vínculos (Service of Coexistence and Strengthening of Bonds)
SEAS	Serviço Especializado em Abordagem Social (Specialized Care for Vulnerable Populations)
SEPS	Serviço Especializado para Pessoas em Situação de Rua (Specialized Homelessness Services)
SFA	Serviço de Acolhimento em Família Acolhedora (Foster Family Care Services)
SM	Salário-Mínimo (Minimum wage)
SUAS	Sistema Único de Assistência Social (Unified Social Assistance System)

Introduction

Since the beginning of the COVID-19 pandemic, Brazil has been facing several significant changes affecting its main cash transfer program, Bolsa Família (PBF, by its acronym in Portuguese). During the most acute phase of the pandemic, the Bolsa Família program () temporarily interrupted the majority of its benefits payment. The reason for this interruption was that PBF beneficiaries began to receive a higher amount offered by the Emergency Aid Program (AE, by its acronym in Portuguese) (Arruda, Barbosa, et al. 2021). As the pandemic started to recede, the AE program was discontinued, and the PBF was replaced by the cash transfer program Brazil Aid (AB, by its acronym in Portuguese). Based on the AE's more generous benefit amount, the AB was a less equitable program due to the fact that it operated under a fixed-benefit structure.

The AB program was also characterized by some significant gaps in the operation primarily due to week coordination mechanisms between the AE and Brazil's social assistance programs, leading to a direct impact on the quality of the central social information system of the country, the Unified Registry (Falcão 2022; O Estado de São Paulo 2023). The New Bolsa Família program (abbreviated here as n-PBF to distinguish it from the PBF) was launched in March 2023 to rectify some of these gaps. It has raised the minimum income for the eligibility criteria and is integrated into a national strategy to enhance the country's social assistance services and to restore the accuracy of the Unified Registry database. (GoB, Min. of Social Development 2023a).

In addition, the n-PBF has further increased the generosity of its benefit, turning the monthly 600 BRL/household into a starting point, adding extra benefits according to the size and configuration of each family. While these are the innovations with higher repercussions, there are still some other innovative aspects of the n-PBF that are worth mentioning, including the introduction of the protection criteria; the removal of the extreme poverty line, which was used as a benchmark for other social policies by the PBF; and fixed rules for the adjustment of benefit amounts and minimum income that determine eligibility for a period of up to 24 months. To understand the real implications and aspirations of each change made by the n-PBF, this report presents a comparative analysis between the original PBF, its supporting programs (as AE), and its successors (AB and, recently, the n-PBF).

This year, the Bolsa Família program celebrates its 20th anniversary. Over the years, the program has become well-known not only in Brazil but also internationally. The anniversary brings a timely opportunity to present some updated information on the program and its recent developments. This analysis begins with an overview, discussing the evolution of each of the above-mentioned programs based on quantity indicators such as

coverage and budget. Subsequently, it compares these variables' relation to some specific aspects of each program regarding eligibility criteria, the selection process of beneficiaries, permanence criteria, conditionality requirements for beneficiaries, benefit formulas, and payment systems.

In general, this report concludes that each supporting program and successor initiative of the PBF has significant differences that characterize more than a simple rebranding process. It is also clear that as the way in which the AE was designed and implemented caused critical consequences. The AE was implemented in isolation without the involvement of some of the traditional operational partners of the PBF (such as sub-national governments and social assistance services) and within a context of sectoral disinvestment that rendered invisible by the capitalization of the cash transfer programs. In the medium term, this affected the targeting capacity of the cash transfer programs that succeeded this experience. In addition, it is also concluded that this fact was exacerbated by the adoption of a generous, though not equitable, benefit by the AB. In this perspective, the n-PBF arises as an oriented effort to address these problems, while (in line with current national fiscal adjustments) introducing unprecedented measures aimed at controlling the program's expenses through stricter protection criteria.

Overview

Since its re-democratization in 1988, Brazil has been developing a vast apparatus of public policies to fight poverty. This includes a national network of social services, policies to raise the minimum wage, a multi-pillar social security system, housing programs, rural and agricultural development programs, and a series of cash and assets transfer programs. Figure 1 illustrates how the main national social programs work together to cover all stages of life. The Bolsa Família cash transfer programme (PBF) is one of the key components that helps bring the different pieces of the system together.

Figure 1. Brazil's main national social assistance services and programs.

<table>
<tr><th>Main management body</th><th>Pregnancy and early childhood</th><th>School-age children and adolescents</th><th>Young people and adults</th><th>Elderly</th><th>Main operating entity</th></tr>
<tr><td rowspan="5">Ministry of Social Development and Assistance, Family and the Fight against Hunger (MDS)</td><td colspan="3">Bolsa Família Program - PBF (cash transfer program with variable benefits according to the number of pregnant women, children, and adolescents)</td><td>SUAS (Unified Social Assistance System)</td></tr>
<tr><td colspan="2">Continuous Cash Benefit Program for People with Disabilities - BCP - PCD (cash transfer program for people with disabilities)</td><td></td><td>Continuous Cash Benefit Program for the Elderly - BCP - Elderly (cash transfer program for the elderly)</td><td>SUAS and Ministry of Labour and Social Security (MTPS) through the National Social Security Institute (INSS)</td></tr>
<tr><td colspan="3">Food Acquisition Program - PAA (from the food distribution perspective) - a national system of purchasing food from family farm households and distributing it to public services and other food distribution initiatives</td><td rowspan="2">SUAS and Ministry of Agrarian Development and Family Agriculture (MDA)</td></tr>
<tr><td></td><td></td><td>PAA (from the purchasing perspective)</td><td></td></tr>
<tr><td colspan="3">Cisterns Programme (a program that provides cisterns for schools and underprivileged families in drought-stricken areas without access to water and sewage systems)</td><td>Sub-national governments and civil society</td></tr>
<tr><td rowspan="3">MDS and SUAS</td><td></td><td>Child Labour Eradication Programme - PETI (structuring actions that complement social assistance services in the fight against child labor)</td><td></td><td></td><td rowspan="3">SUAS</td></tr>
<tr><td>The Happy Child Programme - PCF (maternal and child monitoring program for the development of socio-cognitive skills during early childhood)</td><td></td><td></td><td></td></tr>
<tr><td colspan="4">Social assistance services from the Basic Social Protection (PSB) and the Special Social Protection (PSE) initiatives: a core of 12 initiatives aimed at dealing with the most diverse cases of social vulnerability and rights violations:
• Basic Social Protection (PSB):
1. Protection and Integral Support Service to the Family (PAIF)
2. Service of Coexistence and Strengthening of Bonds (SCFV)
3. Special Social Protection Service for People with Disabilities, the Elderly and their Families (DPDI)
• Special Social Protection (PSE):
4. Protection and Specialized Care Service for Families and Individuals (PAEFI)
5. Special Social Protection Service for People with Disabilities, the Elderly and their Families (PCDIF)
6. Social Protection Service for Adolescents under Probation (LA) and Community Services Measures (PSC) (MSE)
7. Specialized Care for Vulnerable Populations (SEAS)
8. Specialized Homelessness Services (SEPS)
9. Institutional Shelter Services (SAI)
10. Communal Housing Services (SAR)
11. Foster Family Care Services (SFA)
12. Protection services in a declared public calamity and emergencies (SCE)</td></tr>
</table>

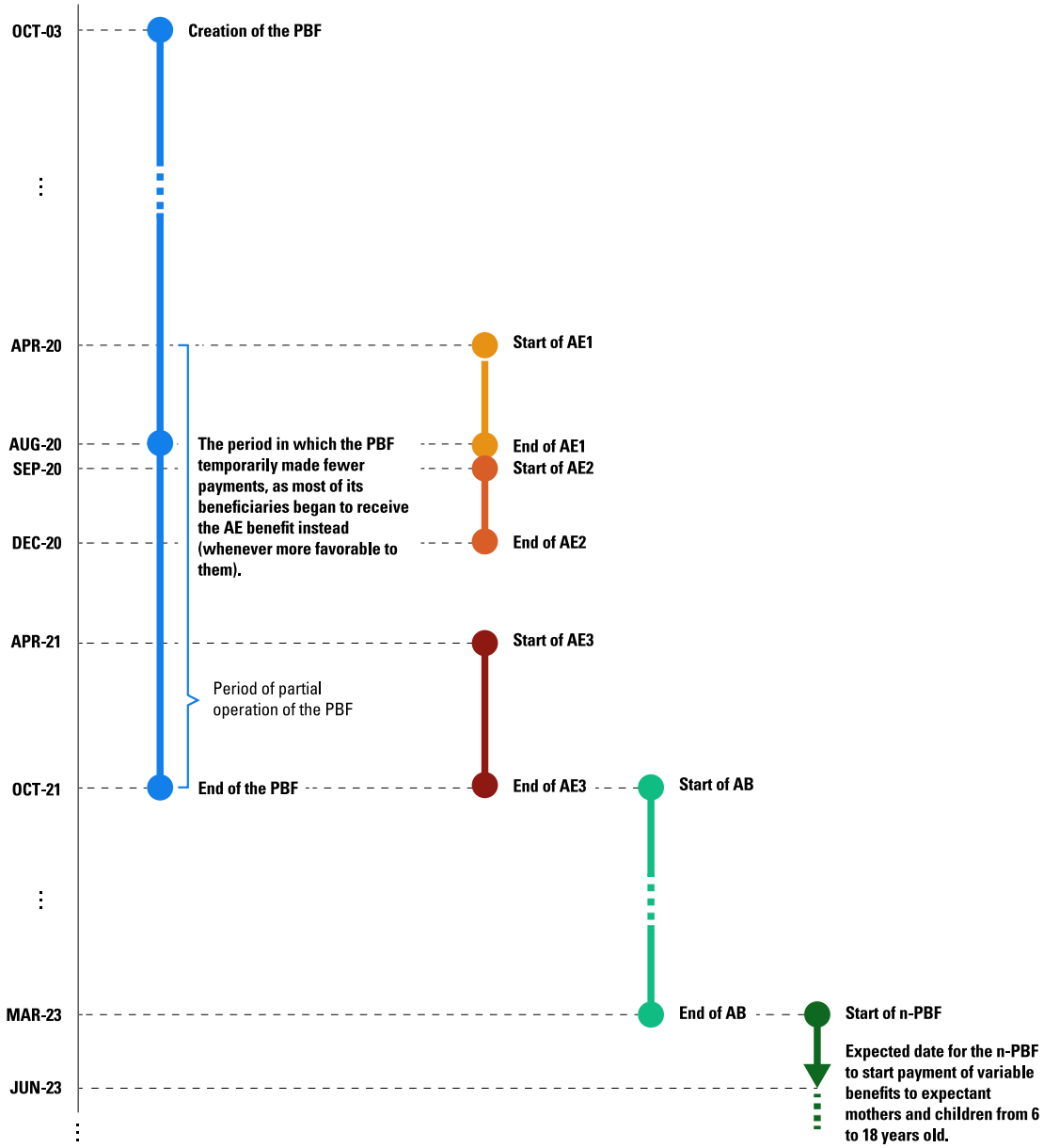
Source: *based on a related study, which analyzes in detail each one of these initiatives (UNICEF in press a.).*

Created in October 2003, the PBF was active until October 2021. It was then replaced by the Brazil Aid program (AB, by its acronym in Portuguese). In March 2023, the AB program was replaced by the n-PBF. With regards to these changes, it is worth highlighting the important role played by the Emergency Aid program (AE, by its

acronym in Portuguese): a one-off cash transfer program implemented over three stages (AE1, AE2 e AE3), which provided coverage for a total period of 16 months (from April 2020 to October 2021, except between January and March 2021). The AE initiative is not considered a successor program of the PBF, although it significantly affected the changes carried out by the PBF since then. It targeted a much larger audience when compared to the PBF and ensured that PBF beneficiaries would receive the AE benefit whenever it resulted in a higher amount.

The AE initiative is crucial to understanding the replacement of the PBF by the AB. Its discontinuation demanded a revision of the PBF benefit to make it closer to the amount offered by the AE in its most generous stage. On the eve of the election year, however, the PBF ended up being replaced by the AB (da Silva e Silva 2022). As presented here, each successor program of the original PBF went beyond a simple re-branding process or a name change. In each case, there were significant changes to the program's structure.

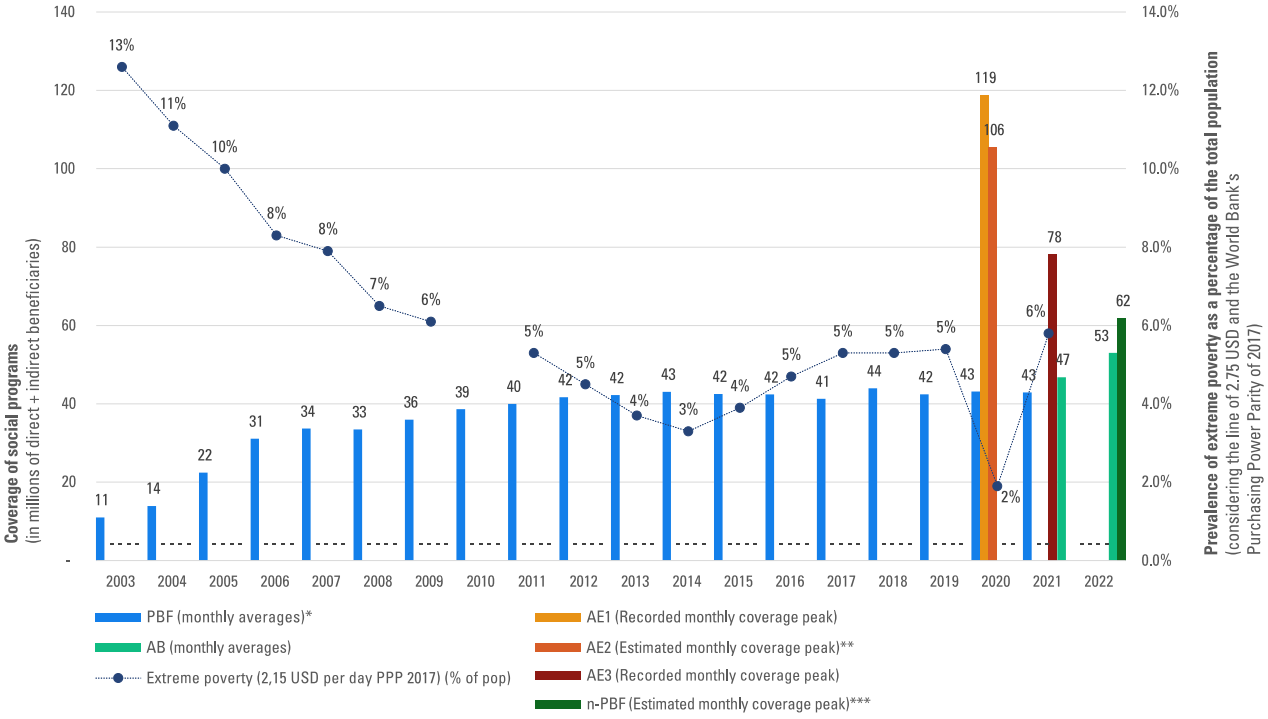
Figure 2. N-PBF timeline and its predecessors



Source: *elaborated by the authors.*

Before presenting the main institutional aspects that distinguish each successor program from the original PBF, it is worth mentioning that, in general, the succession of initiatives is linked to an increase in both the coverage and budget of each program. As depicted in Figure 3, the replacement of the PBF with the AB increased the program coverage from 46 million direct beneficiaries (or 14.5 million beneficiary families) to 53 million (equivalent to 20 million families). The recently enacted replacement of the AB with the n-PFB lead to the inclusion of 700 thousand additional families by the end of March, with the expectation of 60 million people (or 21.5 million families) by June.

Figure 3. Coverage of social programs (total number of direct beneficiaries + their relatives) VS evolution of extreme poverty (2003-2022)



** For the most part of 2020 and 2021, the majority of the PFB beneficiaries received the AE benefit instead. However, this situation did not lead to their exclusion from the PBF: they were kept on the list of beneficiaries but did not receive its benefits whenever the AE's benefit was higher.*

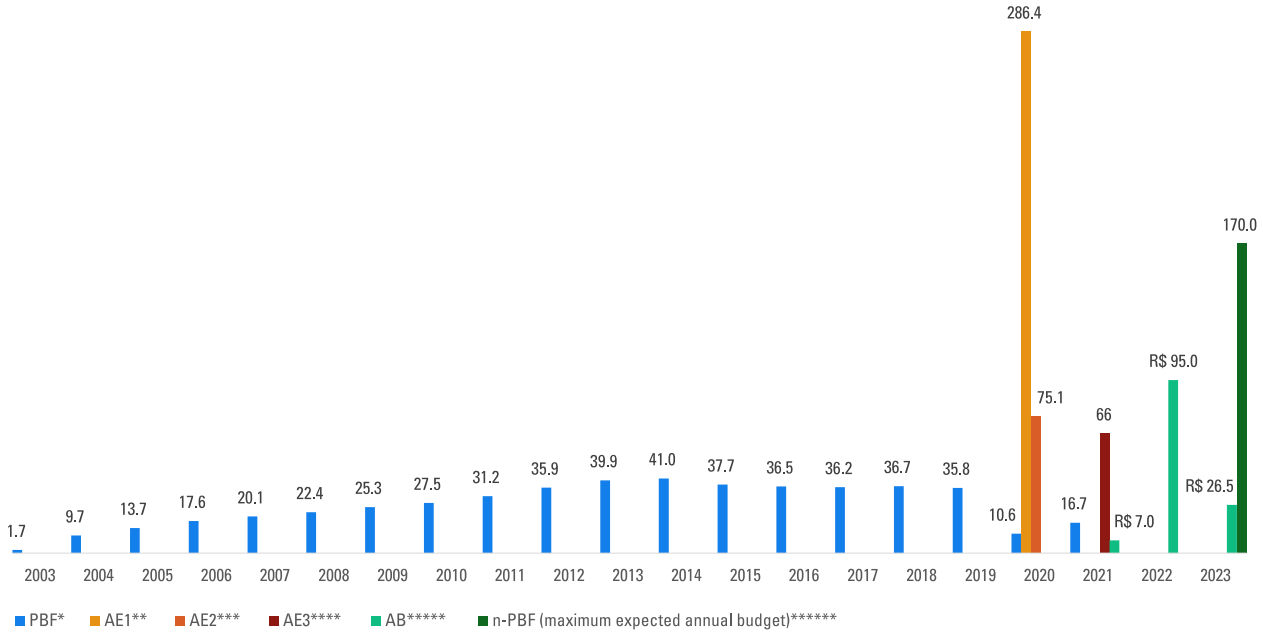
***The estimated value was calculated by multiplying the official coverage of direct beneficiaries provided by the government by the rate of 1.86 (the average between the conversion rate from direct coverage to indirect coverage inferred from official government data for AE1 and AE3). Unlike the other programs, here we have estimated figures since there is no public data on the total number of direct + indirect beneficiaries of AE2. It should be noted that our preference for reporting coverage as the number of direct + indirect beneficiaries aims to maximize comparability between all analyzed programs, as we did not have access to household coverage data for any stage of the EA.*

****The estimated value was calculated by multiplying the expected household coverage by the average household size in the AB.*

Source: *(Arruda, Barbosa, et al. 2021; GoB, Min. Of Social Development 2022b; 2022c; 2022d; 2023a; 2023b; s.d.; World Bank 2023).*

As we shall see later, the historical trend of increasing coverage of the PBF and its successors occurs as a result of adjustments to the program's eligibility criteria, i.e. adjustments to the maximum income that defines eligibility for the initiative (see Annex 1 for a list of measures that have increased the generosity of the PBF each year). As depicted in Figure 4, budget allocation for PBF, AE, and their successors over the years ends up describing a similar variation in their coverage.

Figure 4. N-PBF budget and its predecessors. Real terms (in billions of BRL)



** The PBF budget for 2021 includes only the period between January and October, as the program was discontinued after that. Moreover, the budget for 2020 and 2021, which is significantly lower than its historical average, reflects that many of PBF's beneficiaries have spent a good part of this period receiving the AE benefit instead (whenever more favorable to them).*

*** The AE1 budget includes only the active period of the initiative, between April and August 2020.*

**** The AE2 budget includes only the active period of the initiative, between September and December 2020.*

***** The AE3 budget includes only the active period of the initiative, between April and October 2021.*

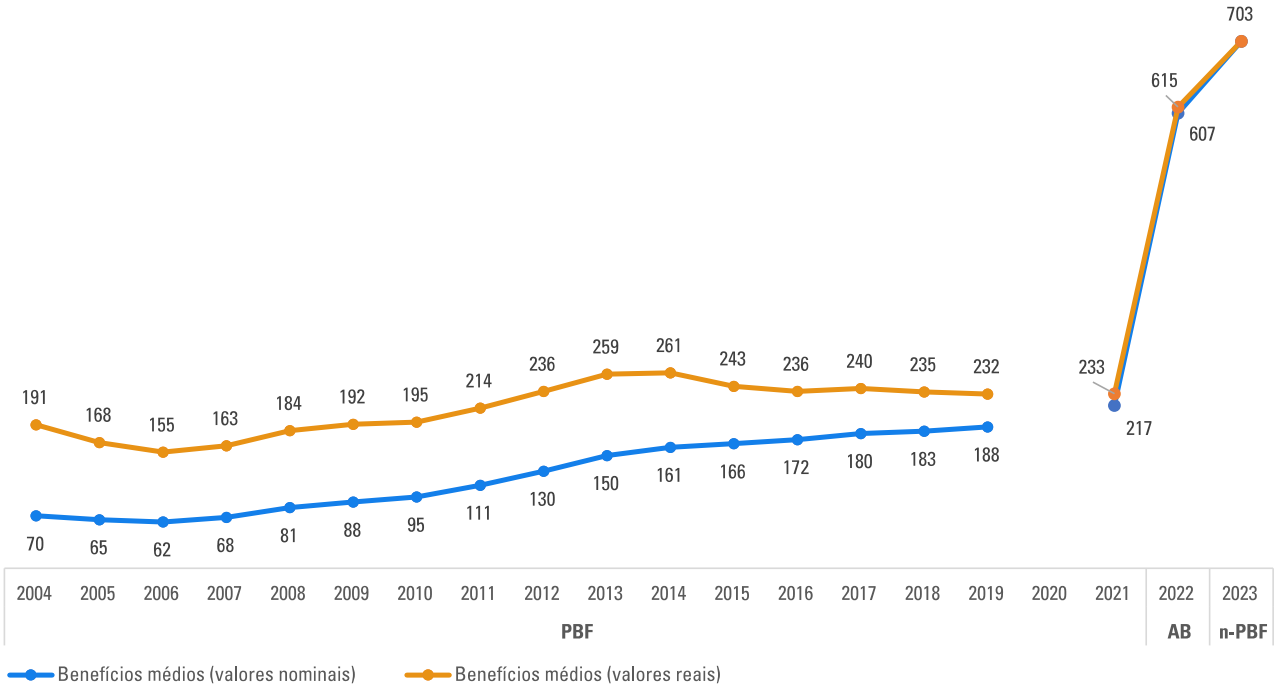
****** The AB budget for 2020 includes only the first two months of the program, namely November and December. In its turn, the budget for 2023 includes only the last two active months of the initiative, January and February, as it was replaced by the n-PBF from March onwards.*

******* There is still no public data on the exact cost projection of the n-PBF. For this reason, we used as a reference the figure of 170 billion BRL, highlighted by program managers in public statements (O Estado de São Paulo 2023), and consistent with the resources made available for the program by the LOA 2023 (which could originally also be aimed at other social policies).*

***Source:** elaborated by the authors based on the following sources: BRAZIL (2023); GoB, Ministry Of Citizenship (2022); GoB, Ministry Of Social Development (2022a); (2022b); (2022d); n.d.; O Estado de São Paulo (2023).*

Another important aspect influencing the budgetary trajectory of the PBF, AE, and their successors is the rate at which the program adjusts its benefit amounts to inflation rates. As can be seen in Figure 5, during the consolidation stage of the program, between 2003 and 2006, there was a reduction in average real and nominal benefits. From then on, the program made up for the losses and experienced multiple increases until 2014, after which it suffered inflationary losses until 2019. In 2020 and 2021, the reduction in the PBF budget (see Figure 4), without formally reducing its coverage, reflects the fact that the majority of its beneficiaries began to receive the AE benefit instead, as it represented a far more generous amount.

Figure 5. Evolution in average benefits paid by PBF, AB, and n-PBF to beneficiaries' households (real and nominal values)



Note: The figures for 2021 refer to those paid by the PBF, and for 2022 refer to those paid by AB. Figures for 2023 indicate the expected average benefit of n-PBF as of June, when the initiative will begin to pay additional variable benefits for expectant mothers and children over 6 years of age (in addition to the variable benefits for early childhood, already in place). However, considering the March 2023 payroll only, the average n-PBF benefit would be 670 BRL. Average benefit figures for 2020 have been omitted as, in that year, most beneficiaries were receiving AE benefits rather than those offered by the PBF itself.

Source: *elaborated by the authors based on (GoB, Ministry Of Social Development 2022b).*

Comparing Figure 3 and Figure 5, it can be seen that variations in the real value of average benefits seem to be more correlated with fluctuations in the PBF coverage between 2012 and 2019 than in other periods. This difference seems particularly remarkable when considering the operating period of AB and n-PBF, in which real average benefits virtually tripled while coverage grew by less than 50% compared to the pre-pandemic immediate period. This event is explained by the fact that, throughout its existence, beneficiaries whose pre-benefit earnings were below the extreme poverty line received lower amounts, calculated at a more basic level. From 2012 onwards, the PBF also introduced the Benefit to Overcome Extreme Poverty (BSP, by its acronym in Portuguese), which offered an additional amount to cover possible gaps of persisting extreme poverty among the PBF beneficiaries even after the calculation of pre-benefit income and other benefits of the program.

Both the basic benefit for extremely low-income families and the supplement offered by the BSP therefore functioned as indexers to the extreme poverty threshold, thus defining access to the program and its benefit calculation. This means that, whenever there was an increase in the extreme poverty line, more people had access to the program, and there was also an increase in the value of the basic benefits and benefits for overcoming extreme poverty.

As we will see later, in practice the AB program has come to operate as a non-variable benefit, thus breaking away from the indexation factor. Meanwhile, although the n-PBF has once more taken up a more equitable benefit structure, varying in accordance with the configuration of each family, it no longer refers to the extreme poverty line or associates its benefit formula with the income thresholds that the initiative adopts as part of its eligibility criteria. Clearly, the AB and n-PBF programs have expanded their generosity in terms of coverage and benefit amounts. However, it will be important to monitor the extent to which the absence of an index will affect the balance with which the n-PBF will correct its eligibility criteria and benefits amount in the face of inflation in the coming years.

Main institutional changes between the PBF, its successor programs (AB and n-PBF), and the AE

In general, the PBF, its successors (AB and n-PBF), and the AE consist of cash income programs whose main eligibility criterion is household income. The PBF, AE, and n-PBF are focused on families, not on individuals, and require their beneficiaries to comply with a set of criteria in the areas of education and maternal and child health. One more similarity between these programs is that they all carry out selection processes that prioritize women and other vulnerable groups. Furthermore, all programs process their payments through Caixa Econômica Federal – the Brazilian public bank with the greatest national reach, with branches in around 99% of Brazil's 5,570 cities. Both the PBF, the AB, and the n-PBF also share the operating model of selecting beneficiaries exclusively through the Unified Registry, with collaboration within the Unified Social Assistance System (SUAS, by its acronym in Portuguese) (Paiva, Cotta, e Barrientos 2019; Arruda, Barbosa, et al. 2021; Arruda, Lazarotto de Andrade, et al. 2021; Arruda et al. 2022; Falcão 2022; GoB, Ministry of Social Development 2023a; 2017; Lindert 2009; Osório e Soares 2014).

The Unified Registry is Brazil's main social registry information system, a tool for collecting and registering data of low-income households, i.e., families living with a total household income of up to three minimum wages or a per capita household income of up to half of minimum wage. The Unified Registry updates information on registered households every two years or whenever there are changes to the household structure and/or income. Currently, the Unified Registry system provides data for around 30 Brazilian social policies (Barbosa et al. 2021; UNICEF in press b.). On the other hand, SUAS is an inter-federative system that balances autonomy and homogeneity in the provision of social assistance services, which are implemented by the different subnational governments, also playing a key role in providing data for the Unified Registry and supporting the PBF (and its successors) and many other Brazilian social policies (UNICEF in press a.).

For comparative purposes, Table 1 summarizes some of the main attributes of each one of these initiatives, explaining some of the differences between the PBF, the AE, and its successors (AB and n-PBF), as mentioned above. In addition to these, the table also shows notable differences in the ways in which PBF, AB, and n-PBF operate some of their key functions such as the definition and selection processes of beneficiaries, as well as the management of the permanence criteria, benefit calculation, and conditionalities.

Table 1. Pt 1 of 4 Summary of n-PBF and its predecessors' attributes. Period of existence, eligibility rules and the selection process of beneficiaries

	PBF (refer to Annex 1 for more details)	AE	AB	n-PBF
Existence period	October 2003 to October 2021	• AE1 - April 2020 to August 2002 • AE2 - September to December 2020 • AE3 - April to October 2021	November 2021 to February 2023	March 2023 onwards
Eligibility criteria	• Per capita household income (RFPC, by its acronym in Portuguese) that ranks families below the poverty and extreme poverty lines. • Originally, in nominal values, the poverty and extreme poverty lines were 100 BRL and 50 BRL respectively. Through successive increases over the years, however, these thresholds have been doubled by 2021.	• AE1 and AE2 - up to two beneficiaries per family with an RFPC (Per capita household income) of ½ Minimum Wage (MW) OR Total Household Income of up to 3 MW. In 2020, the nominal value of the MW was 1,039 BRL. • AE3 - up to one beneficiary per family with an RFPC (Per capita household income) of ½ Minimum Wage (MW) AND Total Household Income of up to 3 MW. • There was also a set of criteria that defined the ineligibility of those who were covered by the social security system or had assets rated as incompatible with the program's income thresholds.	• Per capita household income (RFPC, by its acronym in Portuguese) that ranks families below the poverty (210 BRL) and extreme poverty (105 BRL) lines. • After its ending, beneficiary households of the PBF were included in the AB program, even when not complying with the new eligibility criteria. Once included, however, they were subject to the program's permanence criteria.	• Per capita household income of up to 218 BRL per month • After its ending, beneficiary households of the AB were included in the n-PBF program, even when not complying with the new eligibility criteria. Once included, however, they were subject to the program's permanence criteria.
Beneficiary selection process	• The Head of Household (RF, by its acronym in Portuguese) of interested families must have a valid registration in the Unified Registry system. By 2020, Heads of Household should submit an expression of interest to sub-national governments and SUAS service centers. From 2020 onwards, the selection process has been automated, without the need of a formal expression of interest. • Households with an eligible profile are selected by the Ministry responsible for the program based on the information registered in the Unified Registry system, which has a self-declaratory character. Data validation takes place later, as part of the program's permanence criteria. • Both the registration in the Unified Registry and the admission and selection processes of the PBF are made on a rolling basis, depending on budget availability, and prioritizing vulnerable groups and beneficiaries according to poverty estimates at the municipal level and based on the Census.	• The selection process was automatically held by the DATAPREV system for households with valid registrations in the Unified Registry system up to April 2, 2020. • Those who were not previously registered in the Unified Registry system until April 2, 2020, could apply for the benefit through an app developed and managed by Caixa. The selection of eligible beneficiaries, however, was held by DATAPREV. • AE1 app requests were available between April and July 2021. During the remaining stages of the program, eligible people were selected from among former beneficiaries, who had continually received the benefit over previous stages. • DATAPREV had access to a large administrative database (which included social security and labor information, already in use in the context of Brazil's National Social Security Institute, the INSS) and used to validate the information during the selection process.	• DATAPREV held an automatic selection among all valid registrations in the Unified Registry system (however, the process of removing beneficiaries with invalid registrations was postponed several times). • Data validation of information provided to the Unified Registry system follows the original protocol of the PBF and is carried out as part of the permanence criteria, and not during the selection process.	• DATAPREV carries out an automatic selection process from among all valid registrations in the Unified Registry system (the n-PBF program was launched along with the Program for the Emergency Strengthening of the Unified Registry Service (Procad, by its acronym in Portuguese), with the aim of identifying and removing registration errors, which have been piling up since 2020). • Data validation of information provided to the Unified Registry remains as a part of the permanence criteria, and not during the selection process.

Source: *elaborated by the authors based on the several references cited throughout the article.*

Table 2. Pt 2 of 4. Summary of n-PBF and its predecessors' attributes. Permanence and conditionalities criteria

	PBF (refer to Annex 1 for more details)	AE	AB	n-PBF
Permanence/protection criteria	• Since 2005, the self-declared information used during the selection process is checked annually against administrative records available to the Ministry responsible for the program (which varies with each administration). Beneficiaries whose self-declared information is flagged during the verification process are subject to an investigation held by subnational governments and the SUAS, and may be removed from the program if non-compliance is confirmed. • From 2009 onwards, the program allows beneficiaries whose per capita household income has exceeded the eligibility threshold to remain in the program, up to a maximum limit of half of MW.	• Self-declared information is validated during the selection process (and monthly in the case of AE2 and AE3), and beneficiaries are excluded if found ineligible. • There is no tolerance for per capita household income above the program's eligibility thresholds.	• Every year, the self-declared information used during the selection process is checked against the administrative records available to DATAPREV (labor and social security records are considered as priority). Beneficiaries whose self-declared information is flagged during the verification process are subject to an investigation held by subnational governments and the SUAS, and may be removed from the program if non-compliance is confirmed. • The program allows beneficiaries whose per capita household income has exceeded the eligibility threshold to remain in the program, up to a maximum limit of 2.5 times the poverty line used as a reference.	• Every year, the self-declared information used during the selection process is checked against the administrative records available to DA- TAPREV (labor and social security records are considered as priority). Beneficiaries whose self-declared information is flagged during the verification process are subject to an investigation held by subnational governments and the SUAS, and may be removed from the program if non-compliance is confirmed. • The permanence criteria was converted into the protection criteria. The program allows beneficiaries whose per capita household income has exceeded the eligibility threshold to remain on a temporary basis in the program, up to a maximum limit of half of MW. In this case, however, they are only entitled to receive half of the benefit amount.
Conditionalities	In the education sector • Minimum attendance of 85% for children aged 6 to 15; • Minimum attendance of 60% for children aged 4 to 6 years old (to be completed); • Minimum attendance of 60% for children aged 4 to 6 years old (to be completed); In the health sector • Compliance with vaccination schedules, including nutritional status assessment, for children up to 7 years of age (to be completed); • Prenatal care for pregnant women.	There was none	In the education sector • Minimum attendance of 60% for children aged 4 to 6 years old (to be completed); • Minimum attendance of 85% for children aged 6 to 17 and for young people aged 18 to 21 who receive the variable benefit and have not yet completed primar school; In the health sector • Compliance with vaccination schedules, including nutritional status assessment, for children up to 7 years of age (to be completed); • Prenatal care for pregnant women.	In the education sector • Minimum attendance of 60% for children aged 4 to 6 years old (to be completed); • Minimum attendance of 75% for children aged 6 to 18 years old (to be completed) who have not yet completed primary school; In the health sector • Compliance with vaccination schedules, including nutritional status assessment, for children up to 7 years of age (to be completed); • Prenatal care for pregnant women.

Source: *elaborated by the authors based on the several references cited throughout the article.*

Table 3. Pt 3 of 4. Summary of n-PBF and its predecessors' attributes. Benefit calculation

	PBF (refer to Annex 1 for more details)	AE	AB	n-PBF
Benefit calculation	In October 2021, in its last structure, the program offered a Basic Benefit of 100 BRL per month to extremely low-income households (linked to the program's extreme poverty line). In addition, both low-income and extremely low-income households received up to 5 variable benefits per child, young person (16 to 17 years old), pregnant woman and/or nursing mother. Children, pregnant women, and nursing mothers received an additional 49 BRL per month, and young people received an additional 57 BRL per month. Finally, there was the Benefit to Overcome Extreme Poverty, which supplemented the above benefits with the amount needed to ensure that no family remained below the extreme poverty line.	• AE1 offered 5 payments of 600 BRL per beneficiary, with a maximum of 2 beneficiaries per household. Female-headed households were entitled to double benefits. • AE1 offered 4 payments of 300 BRL per beneficiary, with a maximum of 2 beneficiaries per household. Mothers who are heads of one-parent households were entitled to a doubled amount of the benefits. In these cases, however, other family members could not receive the benefit. • AE1 offered a basic benefit of 250 BRL for just one beneficiary per household. Mothers who are heads of one-parent households were entitled to an additional 125 BRL per month, while one-person households with no children were entitled to a smaller amount (150 BRL per month).	In theory, the program operated under a variable benefit structure, offering 130 BRL per month for children up to 36 months of age (to be completed), and an additional 65 BRL per month for pregnant women, nursing mothers, children, adolescents, and young people up to 21 years of age. There was also the Benefit to Overcome Extreme Poverty, which supplemented the above benefits with the amount needed to ensure that no family remained below the extreme poverty line. In addition, there was the Transitional Compensation Benefit (BComp, by its acronym in Portuguese) to ensure beneficiaries coming from the PBF would continue to receive its amount whenever the AB benefit proved to be less favorable to them. However, the benefit structure described above was early on substituted by two other benefits: the Extraordinary Benefit (BEXT, by its acronym in Portuguese), introduced in December 2021, and the Supplementary Benefit (BC, by its acronym in Portuguese), introduced early 2022. These changes made AB operate as a fixed benefit program. BEXT offered a supplement to the variable benefits, ensuring that no household received less than 400 BRL per month, while the BC offered an additional 200 BRL per month per household. Both benefits were originally intended to be temporary but ended up being maintained until the end of the program. In addition to the benefits listed above, there was a financial incentive for "individual effort and emancipation" of 1,000 BRL per year for families with children excelling in scientific or sporting competitions, as well as an additional 200 BRL per month for family farm households who provided the Alimenta Brasil program with a production equivalent to at least 10% of this amount (Alimenta Brasil is a national system of purchasing and distribution of food from family farm households). These benefits were never implemented on a large scale.	The program once again has variable benefits that depend on the size and configuration of the family, as per below: • Citizens' Income Benefit (BRC, by its acronym in Portuguese): 142 BRL per household member, offered to all the beneficiary households. • Supplementary Benefit (BC, by its acronym in Portuguese): a supplement to the BRC to ensure no household receives less than 600 BRL per month. • Early Childhood Benefit (BPI, by its acronym in Portuguese): 150 BRL per child between 0 and 7 years old (to be completed). • Family Variable Benefit (BVF, by its acronym in Portuguese): 50 BRL per expectant or nursing mother, children, and adolescents between the ages of 7 and 18 (to be completed) to be paid as of June 2023. In addition, there is the Transitional Extraordinary Benefit (BET, by its acronym in Portuguese) to ensure beneficiaries coming from the AB continue to receive its amount whenever the n-PBF benefit proves to be less favorable to them. Legacy from the AB, financial incentives for "individual effort and autonomy" are discontinued after a one-year period, counting from the date of first payment.

Source: *elaborated by the authors based on the several references cited throughout the article.*

Table 4. Pt 4 of 4. Summary of n-PBF and its predecessors' attributes. Benefits payment, coverage and budget.

	PBF (refer to Annex 1 for more details)	AE	AB	n-PBF
Benefits payment	• Payment is made through the Federal Savings Bank (CAIXA, the public commercial bank with the greatest national reach), at no cost to beneficiaries. • Payment is made into a Caixa Fácil Savings Account. For those who don't have a Caixa Fácil Savings Account (for lack of interest or lack of necessary documentation), the payment is made through the PBF Social Card. The PBF Social Card only allows the full withdrawal of the benefit each month (at CAIXA or a partner bank); if the beneficiary fails to withdraw the full amount within a specific time window, the amount is automatically reversed. • At the end of 2020, the payments of the population with the minimum requirements to open a bank account were transferred to the Digital Social Savings Account (PSD, by its acronym in Portuguese), which was already used as the payment method of AE.	• Payment through CAIXA. • Opening of a Digital Social Savings Account (PSD): similar to Caixa Fácil, but a fully digital account, which includes the possibility of cardless transactions. • Caixa Fácil Savings Account and PBF Social Card continued to be the payment method for PFB beneficiaries until the migration to the Digital Social Savings Account (PSD) to those meeting minimum requirements.	• Payment through CAIXA. • Payment is made preferably through Digital Social Savings Account (PSD). The PBF Social Card is maintained for beneficiaries who do not meet the minimum requirements for a PSD opening.	• Payment through CAIXA. • Payment is made preferably through Digital Social Savings Account (PSD). The PBF Social Card is maintained for beneficiaries who do not meet the minimum requirements for a PSD opening.
Coverage	The program benefited 14.6 million households (43 million people) when it was discontinued in October 2022.	Over its three stages, the AE program benefited an average of 50.7 million direct beneficiaries per month, reaching its peak during AE1, when coverage was of 68.3 million direct beneficiaries (equivalent to 118.8 million direct and indirect beneficiaries). During AE2, coverage was 56.8 million direct beneficiaries and 39.4 million during AE3.	The program reached a peak of 21.9 million beneficiary households in February 2023 (equivalent to 55.7 million individuals).	The program covered around 21.5 million households by June 2023. In addition to the inclusion of newly eligible beneficiaries due to the higher income threshold, changes are likely to take place in order to correct errors in registration data made by the previous program, estimated at more than 1 million households.
Budget	In real terms, the PBF spent 17 billion BRL in 2021 (when many of its beneficiaries received the AE3 benefit instead). In 2019, the PBF budget reached 31 billion BRL in real terms, one year before the introduction of the AE.	In real terms... • The AE1 spent 286 billion BRL on benefits; • The AE2 spent 75 billion BRL on benefits; • The AE3 spent 66 billion BRL on benefits;	In real terms, the program spent 95 billion BRL on benefit payments between January and December 2022.	The 2023 Annual Budget Law (LOA, by its acronym in Portuguese) made available resources of up to 170 billion BRL, which can be used for n-PBF and other social spending. However, according to some statements given by the program's managers, the n-PBF may end up getting the full amount of the budget.

Source: *elaborated by the authors based on the several references cited throughout the article.*

As shown in Table 1, the AE disrupted the selection process based solely on the Unified Registry. Almost half of all AE beneficiaries were not previously registered in the Unified Registry and applied to the benefit through the app

developed by CAIXA. Although based on the urgency of reaching a much larger population and avoiding crowds at SUAS service points, this ended up jeopardizing the accuracy and quality of the Unified Registry information. During the almost two years of operation of the AE, the requirement to register and/or update the information in the Unified Registry in return for the benefit no longer existed. The PBF, which traditionally required registration updates from its beneficiaries, suspended this procedure during the pandemic and the AE did not encourage its beneficiaries to register.

This was worsened by the fact that, once the AE was over, there was no systemic effort to ensure that the beneficiaries who applied through the app were properly integrated into the Unified Registry. Therefore, the first few months of the AB program were affected by an overload of SUAS centers due to the increased demand for new registrations and updating of the Unified Registry (Arruda, Barbosa, et al. 2021; Arruda et al. 2022; Barbosa et al. 2021; G1 2020; CNM 2000; 2022).

Another particularly relevant aspect shown in Table 1 concerns how the AE and AB broke with the equitable payment structure of the original PBF, which provided variable benefits according to the household size and composition, as well as the existence of children, expectant, and nursing mothers. In the case of AE, there was even a change in focus of the program, which became centered on the individual rather than the family, even though there was a maximum quota of individual beneficiaries per family. If on the one hand, the AE had the merit of offering a much more generous benefit than the PBF (and therefore more in line with the challenges brought about by the pandemic), on the other hand, it ended up losing out on terms of equity since it offered mostly fixed benefits (one-parent households headed by the mother being the exception). Under strong electoral influence, the AB ended up inheriting the fixed-benefit structure of the AE1 when it replaced the PBF. Although the AB had a variable-benefit structure in theory (depending on the household composition), in practice all households received a fixed benefit of around 600 BRL, which was due to the creation of the extraordinary and supplementary benefits introduced shortly after the creation of AB (O Estado de São Paulo 2023).

The fixed-benefit structure of the AE and the AB also represented an additional obstacle to the data accuracy of the Unified Registry, since it ended up acting as an incentive for members of the same family to leave out information on their relationship levels. It also highlighted the structural challenge of Brazilian administrative records, which are characterized by the absence of a national identity register. As we know, national identity registers are state-based and have gaps in their integration. In addition to only covering a small fraction of society (people who declare income tax), data on household composition held by the Brazilian Internal Revenue Service is not shared with other public bodies due to confidentiality issues (Barbosa et al. 2021; Arruda, Barbosa, et al. 2021).

As announced by the current government, there was most likely an artificial increase of around 5 million one-person households during the period of the AB, in addition to another 1 million being investigated by the n-PBF management team. There are thus a suspicion that at least 2.5 million households benefiting from the program are not in fact eligible (O Estado de São Paulo 2023; GoB, EBC 2023). It's no coincidence that the n-PBF was designed explicitly to restore the equity component of the original PBF's benefit structure, as well as its role as an incentive for the population to provide reliable information. The n-PBF was launched in sync with a specific policy to strengthen SUAS and the Unified Registry. It also ensures other variable benefits according to household composition in addition to the minimum of 600 BRL per household.

Another turning point in the trajectory of the PBF and its successors concerns the measures designed to fact-check the information provided by applicants, as well as to define the extent to which beneficiary households can remain in the program in the case of an increase in their income (above the eligibility line). This set of criteria is important since historically PBF beneficiaries tend to experience a lot of income variations (Soares 2010). Therefore, regulations on acceptable income variations contribute both to the progressiveness of the program's coverage, avoiding errors of data inclusion and exclusion, and to the prevention of employment discouragement.

As we know, the Unified Registry is largely self-declaratory, especially with regards to income and household composition. Both the PBF and its successors carry out the selection process based on this data.

It is not until the data validation process takes place that decisions are taken as to whether to keep or exclude beneficiaries whose declared information is deemed suspicious (Paiva, Cotta, e Barrientos 2019; Osório e Soares 2014). Historically, the PBF has always flagged possible cases of ineligibility by cross-referencing other administrative databases, which for many years were defined to this end, not least because of the difficulty in obtaining access to other public databases. With the introduction of the AE, the data validation began to take place along with the selection process (and not subsequently to it). An unprecedented wide range of data was available to this end, which began to be updated much more constantly. However, and given the strong position of control bodies, some probable excessive actions were found in the procedure, such as relying on databases of questionable quality, or even the usage of asset ownership as indicators of an individual's real income. From this lesson, both the AB and the n-PBF ended up going back to the procedure previously adopted by the PBF, which carried out the data validation process after the selection phase, rather than at the same time. For this, however, more appropriate databases were available, especially those of a labor and social security nature.

The AB and n-PBF also discontinued the permanence criteria adopted by the AE, which defined access to the benefit according to income variations. In the case of n-PBF, the permanence criteria were converted into the protection criteria. The AE had zero tolerance: a beneficiary was automatically excluded from the program if his/her income increased above the eligibility line. (Arruda, Barbosa, et al. 2021; Barbosa et al. 2021). In the case of the PBF, AB, and n-PBF, income increases higher than the eligibility line were allowed up to a certain limit. Although the structure of the criteria was the same for the three programs, it should be noted that the AB employed the poverty line as a reference, while the PBF and n-PBF used the MW as a reference, which historically undergoes more robust and frequent monetary corrections than the poverty line. Given the short duration of the AB, however, it was not possible to assess the extent to which the index referencing the poverty line led to actual higher inflationary losses than it would have if the reference had been kept at the MW (Paiva, Cotta, e Barrientos 2019; Osório e Soares 2014).

Just as the PBF and the AB, the n-PBF allows households complying with the permanence (or protection) criteria to receive the benefit for up to two years. However, the n-PBF innovated by specifying that these households should only receive half of the benefit they were entitled to as long as their income remained below the permanence criteria line (GoB, Min. of Social Development 2023a).

This choice reflects a concern on the part of n-PBF managers to set the program's budget on a more sustainable basis, given that the succession of increases in benefits inaugurated by the AE and the AB has become unsustainable from a fiscal point of view.

It is worth emphasizing that the AE introduced a huge advance when it comes to the benefits payment, which was adopted by the AB and is now also part of the n-PBF. Even though the PBF already offered its beneficiaries a bank account free of charge, it would only be opened through a formal request on their part; otherwise, the deposit would be made into an account that only allowed the benefit full withdrawal, which led to the return of unspent funds to the National Treasury from time to time. The AE not only opened bank accounts automatically for beneficiaries who did not indicate other means for receiving the benefit but also granted them access to a digital bank account which was of greater convenience for account holders.

Finally, it is worth noting that the n-PBF does not base its income eligibility criteria, nor its benefit amounts on poverty and extreme poverty lines. This absence, while not necessarily affecting the program, may bring implications for other public policies. As we know, Brazil does not have an official national poverty or extreme poverty line. The lines arbitrated by the PBF and the AB have thus always played an instrumental and unofficial role in this regard. The fact that n-PBF does not base its eligibility criteria on poverty and extreme poverty lines ends up limiting the tools

available for a proper analysis of the poverty in the country, while bringing about challenges also for other programs that historically operate in accordance with the benchmarks established by the PBF and AB. This, however, may be of minor concern compared to the fact that the n-PBF does not have two eligibility lines that serve to define the severity of deprivation.

Conclusion and final remarks

In many ways, the AE gave rise to (or was the result of) an approach to social protection grounded on the amount of the benefit. Naturally, this is an important aspect of any cash transfer program. The merit of the AE in negotiating fiscal space for the payment of generous benefits and in increasing the population's welfare conditions in the short run is undisputed. At its peak, the AE even affected national poverty indicators (Cereda, Rubião, e Sousa 2020; Lara Ibarra 2021; Gonzales e Barreira 2020; Gonzales e Oliveira 2021; GoB, IBGE 2021). As we have seen, however, making this achievement possible at the expense of not investing in other areas, as well as the lack of due care for the operational mechanisms of the sector, tends to undermine these gains in the medium and long term. Therefore, one of the main challenges of the n-PBF is precisely reducing the overload at SUAS centers and restoring the accuracy of the Unified Registry by encouraging families to once again declare reliable information, so as to avoid targeting errors that compromise the fairness of the program.

The quality of the Unified Registry database not only impacts the n-PBF operation itself but also affects all other social policies, since they make use of this tool for prioritizing purposes (including those with large budgets, such as housing and rural and agrarian development policies). Given the centrality of the PBF in the national social protection system, in many ways it may be more cost-effective to offer additional variable benefits that encourage family members to declare accurate information than to distort the budget of various social policies that are unable to prioritize their target population. In the wake of the (re) prioritization of social policies that led to the creation of the n-PBF, it is worth noting that other programs with great budgetary potential that make use of the Unified Registry also tend to gain momentum.

In addition to potentially recovering part of the cost by enabling an accurate Unified Registry database, the n-PBF also demonstrates its concern with fiscal impacts through measures such as the reduction of the benefit paid to households within the permanence/protection criteria, as well as the incorporation of a structured protocol for validating the self-declared information of its beneficiaries.

Despite having the same name as the program implemented between 2003 and 2021, the n-PBF, launched last March, is significantly different from its predecessors, as it uses new tools to recover the essential values promoted by the original PBF. It does so in a much more challenging environment, characterized by the recent use of the AB for electoral purposes, by the fiscal environment that urges for more sustainability, and by the challenge of managing a benefit which, as it gets close to the MW, requires effective measures to prevent employment discouragement, resistance to joining the contributory system, and undesirable macroeconomic effects.

Annex 1. Evolution of increase of generosity policies throughout the history of the PBF

The table lists only the years in which we identified changes in the program's generosity, highlighting in green the specific aspects that led to the increase in each year.

Reference year	Per capita line of...		Basic benefit (fixed amount paid only for EP households)	Variable benefits										Other relevant aspects
				Variable benefits for children		Variable benefits for young people		Variable benefits for nursing mothers		Variable benefits for expectant mothers		Ending Extreme Poverty Benefit		
	Extreme Poverty	Poverty (P)	Amount	Amount	Eligibility	Amount	Eligibility	Amount	Eligibility	Amount	Eligibility	Amount	Eligibility	
2003	50	100	50	15	P and EP with children (max 3)	-	-	-	-	-	-	-	-	-
2006	60	120	50	15	P and EP with children (max 3)	-	-	-	-	-	-	-	-	"Between 2006 and 2007, the IGD-Bolsa began to operate, compensating local SUAS teams according to the efficiency with which they provide support services to the PBF and to the Unified Registry."
2007	60	120	58	18	P and EP with children (max 3)	30	P and EP with young people (max 2 young people within the quota of up to 5 variable benefits)	-	-	-	-	-	-	Conditionalities began to be monitored and the use of the Unified Registry by other social programs became more rigorous. Cross-references between the Unified Registry and other records, which had been occurring unsystematically since 2005, are now happening more regularly.
2008	60	120	62	20	P and EP with children (max 3)	30	P and EP with young people (max 2 young people within the quota of up to 5 variable benefits)	-	-	-	-	-	-	-
2009	70	140	68	22	P and EP with children (max 3)	33	P and EP with young people (max 2 young people within the quota of up to 5 variable benefits)	-	-	-	-	-	-	Based on a study by Serguei (2009), the program adopts a permanence criterion that allows beneficiaries who exceed the poverty line but remain below the half-MW line to keep their benefits for up to 24 months.
2010	70	140	68	22	P and EP with children (max 3)	33	P and EP with young people (max 2 young people within the quota of up to 5 variable benefits)	-	-	-	-	-	-	V7 of the Unified Registry (online) and with aspects aimed at active search/identification of GPTEs, which continued to operate integrated with the previous versions (online) until the full adoption of V7 (in 2013).

2011	70	140	70	32	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	38	P and EP with young people (max 2 young people within the quota of up to 5 variable benefits)	32	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	32	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	-	-	-
2012	70	140	70	32	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	38	P and EP with young people (max 2 young people within the quota of up to 5 variable benefits)	32	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	32	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	Equal to the extreme poverty gap when adding the pre-cash transfer program income to other benefits.	EP with children (originally from ages 0 to 6, and later from ages 0 to 15)	Reorientation of the approach to conditionalities, leading to a reduction in the cancellation of benefits and a greater provision of psychosocial support for families in non-compliance. Cancellation only after 1 year of attempted resolution. 17,500 cancellations in May 2012 vs 241 in May 2014.
2013	70	140	70	32	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	38	P and EP with young people (max 2 young people within the quota of up to 5 variable benefits)	32	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	32	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	Equal to the extreme poverty gap when adding the pre-cash transfer program income to other benefits.	EP	-
2014	77	154	77	35	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	42	P and EP with young people (max 2 young people within the quota of up to 5 variable benefits)	35	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	35	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	Equal to the extreme poverty gap when adding the pre-cash transfer program income to other benefits.	EP	-
2016	85	170	85	39	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	46	P and EP with young people (max 2 young people within the quota of up to 5 variable benefits)	39	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	39	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	Equal to the extreme poverty gap when adding the pre-cash transfer program income to other benefits.	EP	-
2018	89	178	89	41	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	48	P and EP with young people (max 2 young people within the quota of up to 5 variable benefits)	41	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	41	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	Equal to the extreme poverty gap when adding the pre-cash transfer program income to other benefits.	EP	Introduction of the Christmas bonus (payment of a 13th installment in December)
2021	100	200	100	49	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	57	P and EP with young people (max 2 young people within the quota of up to 5 variable benefits)	49	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	49	P and EP with children (max 5, including young people, nursing mothers and pregnant women)	Equal to the extreme poverty gap when adding the pre-cash transfer program income to other benefits.	EP	-

Note: All figures presented here are nominal values in BRL for the indicated years.
Source: elaborated by the authors based on the several references cited throughout the article.

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