



**Case Study**  
**Brazil**

**EVALUATION OF THE NATIONAL HUMAN DEVELOPMENT REPORT SYSTEM**

**HUMAN  
DEVELOPMENT**

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## **Executive Summary**

Brazil's national human development reports (NHDRs) have largely taken the form of Atlases that disaggregate the human development index (HDI) by state, municipality, neighbourhood (for some municipalities) and race (in the most recent edition). Hence they have been not so much 'reports' as 'products' (HDPs). These have, however, played an enormous role in promoting human development (HD) approaches in Brazil and creating incentives for politicians, policy makers, journalists, academics, NGOs, entrepreneurs, and advocacy groups to accept, adopt, and discuss HD principles. Human development has become a much-discussed concept throughout much of Brazilian society and is often treated in media reports. The deviation from UNDP's standard report to an Atlas format, while raising its own problems, was well suited to Brazil's objective and subjective conditions and helps explain the phenomenal success of the HDPs.

Many enabling conditions have contributed to this success story. Brazilian culture and recent history lend themselves to a fascination with indexes and a widespread competitive interest in one's own ranking relative to one's neighbours. Widespread concern with Brazil's notoriety as an unequal society has further fueled this interest. On the supply side, innovation, strategic partnerships, and UNDP leadership have also contributed to sustain the success of HDPs.

HDPs have been very influential in government policy making, being constantly used as a targeting tool for social programmes. This is a major contribution in a country of continental dimensions, cut across by severe intra- and inter-regional differences.

The great success of HDPs in Brazil implies that any changes in their production and dissemination should be gradual and incremental. Nonetheless, follow-up mechanisms between reports can be strengthened, software problems that have compromised the accuracy of and accessibility to the most recent Atlas data need to be solved, and there should be a constant awareness of the importance of maintaining the established high standards of Brazil's HDPs. In view of the intransigence of poverty and inequality indicators in Brazil, UNDP might also want to consider joining forces with other public, academic, and non-governmental organizations to address the basic reasons why economic growth has not produced better HD results.

## Introduction <sup>\*</sup>

This report forms part of the Assessment of national human development reports (NHDR) assigned by the UNDP Evaluation Office and it assesses the Brazilian experience. The Assessment's objectives, questions, evaluation criteria, methodological procedures, and other details are presented in the Terms of Reference as is the methodological framework developed by the Team Leader and discussed in an Inception Workshop with the Evaluation Team and the Task Manager, known as Inception Report (Annex I).

Following the Terms of Reference, two main questions are addressed in this report:

- Are NHDRs the most effective vehicles to promote human development (HD) approaches in Brazil?
- What difference have the NHDRs made in Brazil?

Brazil is a case in which HD principles and human development indexes (HDIs) have enjoyed great visibility, extensive media coverage, and have influenced policy making for a decade. Mapping out the trajectory of Brazil's experience, understanding why HD principles and HDIs have become so influential, and extracting the main lessons of this highly praised experience and Brazil's somehow peculiar choice of focusing more on HDIs and on the production of 'supplementary' indexes rather than on NHDRs can be useful for UNDP stakeholders. Of particular importance is the discussion of the enabling conditions and of the strategies adopted to keep HD high on the agenda, as well as the tradeoffs of the strategies adopted.

As opposed to many countries, in which HD reports are more influential than HDIs, NHDR stakeholders in Brazil opted to provide politicians, policy makers and advocacy groups with sound, reliable and disaggregated HD statistics, currently presented in the format of Atlases. This is why those involved in the Brazilian experience refer to the country's experience as developing human development products (HDPs) rather than reports.

Because this Assessment focuses on NHDRs as a system rather than as individual reports, and because HDPs have achieved great success in Brazil, the country has been chosen both as one of the two pilot studies and as one of the five countries in which an in-depth study has been carried out.

The report is based on the following sources: (a) a Preliminary Assessment Report on Brazil written in June 2005 by the team consultant for Brazil; (b) information provided by the project's Focal Point at UNDP Brazil for this Assessment, Mr. José Carlos Libânio; (c) 35 interviews carried out in June 2005 over 10 days by Professors Carl Riskin and Celina Souza in four Brazilian cities (Brasília, São Paulo, Belo Horizonte and Rio de Janeiro) with politicians, policy makers, academics, UNDP partners, UN sister agencies, journalists,

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<sup>\*</sup> I am grateful to Professor Carl Riskin for his additions, comments, and suggestions on this paper, and for his support throughout this project.

members of non-governmental organizations and of advocacy groups (Annex II);<sup>1</sup> (d) desk review; (e) data collected from websites by the team consultant for Brazil and her research assistant, Ms. Mariana Newport; (f) reports commissioned by UNDP Brazil on the media impact of human development reports; and (g) data gathered by UNDP Brazil on the influence of HDIs on state legislations and policies.

In surveying and analysing the Brazilian experience, the methodological procedures adopted were based on the guidelines provided by the Terms of Reference and by the Methodological Framework mentioned above. The principal tool was interviews, which were used both to gather information about planning, production and dissemination procedures, and to assess influence. This required a judicious selection of interlocutors, representing HDP planners and producers as well as government officials, civil society organization leaders, academics and media people. In addition, successful use of interviews requires a thorough grounding by the interviewer in the relevant social history and background in order to understand answers in their proper contexts. An attempt is also made to provide some quantitative measures of influence using literature search techniques and reviews of national secondary and tertiary school examinations (see section 3.5.4).

The report is organized as follows. Section 1 presents an overview of the country's recent social, economic and political contexts. Sections 2 and 3 describe the Brazilian system of human development reports and its trajectory, structured according to the main topics of the Terms of Reference. Section 4 discusses the lessons learned by the Brazilian experience and its challenges and tradeoffs. Section 5 presents some conclusions.

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<sup>1</sup> Some of the interviews had the participation of the Assessment's Task Manager Suppiramaniam Nanthikesan.

## 1. Country context

Brazil has a land area of over 8 million km<sup>2</sup>, a population of over 175 million and an annual population growth of 1.4 percent. The urbanization rate is 81.2 percent. In 2002 Brazil's GDP amounted to approximately US \$451 billion, and its GDP per capita was US \$2,582 (in 2004, GDP per capita was US \$7,770 in PPP). According to the 2001 Census, most Brazilians (54 percent) declare themselves white, followed by mulatto (39.9 percent), black (5.4 percent), Oriental (0.5 percent), and indigenous people (0.2 percent).

Like its Latin American neighbours, Brazil returned to a democratic regime in the late 1980s and in 1988, a major political event took place: the drawing up of a new constitution. The Constitution's key political and policy objectives were to "create a just and solidary society, to guarantee national development, to eradicate poverty and marginalization, to reduce social and regional inequalities, and to promote the wellbeing of all people without prejudice and discrimination". The creation of the 1988 Constitution was coupled with enthusiasm and optimism about the country's future. For 20 months, Congress and Brasília were the centre of Brazilian life, engaging in a visible exercise of democracy and political participation.

The 1980s however were also marked by a debt crisis that swept through all the countries in the continent, and was followed by difficulty controlling the continent's unstoppable rates of inflation. As a result of economic and debt crises, most Latin American countries embarked on monetary, fiscal and financial reforms in the 1990s. In Brazil these reforms have stabilized macroeconomic indicators, decreased rates of inflation, and allowed the country to return to international capital markets.

In spite of the enthusiasm brought about by redemocratization and the relative success of economic reforms, the rates of poverty and income inequality of many countries in the region, Brazil included, have not improved and remain as high as they were two decades ago.

In the case of Brazil, which is classified as a middle-income country, the persistence of 15 percent of the population living in poverty, coupled with its position among the world's frontrunners of income inequality, remains the country's biggest unresolved conundrum. Furthermore, several studies show that poverty and income inequality are higher among blacks and among the rural population. Regional inequalities are also pronounced: the Northeast has about 30 percent of the country's population, but is home to 62 percent of the poor. Intra-state and intra-municipal inequalities are also high.

Brazil's HDI position in the world ranking decreased from 65<sup>th</sup> in 2003 to 72<sup>nd</sup> in 2004, with a HDI of 0.775 in 2004. The organizations involved in the dissemination of the indexes explained that this decrease was due to changes in the methodology introduced in 2004, coupled with the use of outdated education statistics.

Brazil is a federal country in which municipalities are not the creation of states, as in many federations, but part of the federation together with the states, hence the importance of local governments and of municipal policies.

The use of HDIs by federal, state and local politicians and by policy makers has survived several governmental terms, unusual in a country in which policy priorities change even within the same government.<sup>2</sup> HDIs have also maintained a privileged position on the media agenda, also unusual in a generally volatile group. Finally, HDIs have captured the confidence of politicians, policy makers, NGOs, advocacy groups, and the business sector, unanimity which is difficult to achieve in a country cut across by great socioeconomic and regional disparities, by ideological cleavages, and by strong political party competition.

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<sup>2</sup> Social policy priorities changes in Brazil are well documented. See, for instance, Snyder and Yackovlev (2000).

## **2. The Brazilian system of human development products**

The Brazilian experience is characterized by the leading role of UNDP in the dissemination process and by shared participation between UNDP and governmental and academic organizations in the production of human development products (HDP).

Although the production of national human development reports (NHDR) began in 1992, Brazil's first NHDR was only published in 1996. According to one interviewee, the suggestion for UNDP to produce the first Brazilian report was made by a well-known social militant, the founder of Brazil's most respected non-governmental organization (NGO), IBASE. Together with the 1998 report, the 1996 report is the only one that follows the pattern of the human development reports (HDR). In 1998 a decision was made to launch detailed and disaggregated data of each state and of each municipality using the format of an Atlas. In 2004, a Racial Atlas was launched. Brazil has so far produced two printed reports and three Atlases (see Annex III). It has also produced, with the collaboration of UNDP, neighbourhood indexes in three large Brazilian cities/metropolitan regions (Rio de Janeiro, Recife and the Metropolitan Region of Belo Horizonte). All these reports, Atlases and 'supplementary' indexes have become known as HDPs.



### 3. The trajectory of HDPs

The 1996 report was technically coordinated by IPEA, a well-known and respected think-tank linked to the federal government, which was invited by UNDP to undertake the exercise. It was fully financed by UNDP. According to Mr. Libânio, who was responsible for Brazil's HDPs until recently, the production of the first report is always the most difficult, particularly putting together a good team of consultants. Those responsible for Brazil's HDPs have decided not to have a permanent team within UNDP to elaborate the products, but rather to hire consultants or to develop partnerships with several organizations to produce the indexes.

The 1996 report displayed state indexes, introducing 'supplementary' indexes. Later, municipal indexes were also introduced, followed by neighbourhood indexes of the Metropolitan Region of Belo Horizonte and of the city of Rio de Janeiro. Another city, Recife, is also about to launch neighbourhood indexes.<sup>3</sup> These neighbourhood indexes of large Brazilian cities are a spillover effect of state and municipal indexes. They are also an important tool for local policy makers – as the very poor and middle-income residents often live side by side in most Brazilian cities, the territorial disaggregation of the indexes is important for policy making. They have also highlighted the existence of intra-city inequalities, thus broadening the discussion of inequality beyond Brazil's five geographical regions.<sup>4</sup> This shows that Brazil's NHDR started with broader concerns than displaying a national index. This led to a strategy of building 'supplementary' indexes, which later became more important for policy design than the country's position in the world ranking, although the latter is widely publicized every year.

Since the first report, HDPs have reflected Brazil's main conundrums, mainly the country's high level of social and regional inequality. HDPs have also targeted a clear audience: politicians and policy makers. Their attention was attracted through the involvement of the media, which is very competitive and independent from the governments' agenda, particularly the national media.

Because HDPs started in Brazil when redemocratization was already being consolidated, they were not constrained by political issues. Politically, the country has succeeded in creating or re-creating democratic institutions and there are no threats to democracy. Furthermore, redemocratization was seen not only to re-construct political institutions, but also to address social demands, particularly those of large segments of the population who were excluded from the economic gains of the previous regime. Hence, there was a consensus about the need to invest more public resources to tackle poverty and social and regional inequality. Later, this consensus found expression in human development (HD) principles. Furthermore, and as mentioned by one interviewee, in 1993 the country was rocked by the findings of an IPEA study, titled 'Hunger Road'. This study mapped out the situation of those whose income was only enough for one daily meal according to the guidelines established by the Food and Agricultural Organization. The study disaggregated

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<sup>3</sup> In the cases of Rio de Janeiro and Recife, UNDP played a leading role, and in the case of Belo Horizonte, it played a supportive role. Rio de Janeiro is now updating its indexes with no technical or financial support from UNDP. A federal ministry is the main financier of Recife's HDI.

<sup>4</sup> Rio's HDI had great media impact. The city's main newspaper dedicated 10 Sunday supplements to it, being the newspaper's highest investment. The newspaper and the journalist in charge received several awards.

the data by municipality and demonstrated both the size of the problem (around 35 million Brazilians were in that situation) and its territorial concentration (mainly in the Northeast). This awareness also contributed to the consensus about the need to tackle poverty and social and regional inequality.

Socially, there are no taboo issues in Brazil. Intellectually, the country boasts several well-qualified universities and centres of research and statistics. Although Brazil is fulfilling the country's agreements with multilateral organizations such as the International Monetary Fund, it cannot be said that there is a dominance of their paradigms given that they coincide with many policy makers' views.

One event, however, was particularly important for the acceptance and visibility of the first report. It was published two years after the launch of a macroeconomic stabilization plan that succeeded in controlling Brazil's hitherto unstoppable inflation. By controlling inflation, a task pursued for more than 10 years, politicians and policy makers were able to introduce onto the agenda topics and policies other than inflation control. Furthermore, inflation control also made the budget manageable and a more effective tool for determining policy priorities. This is because in inflationary settings, budgetary figures are eroded by high rates of inflation.<sup>5</sup> Thus, the publication of Brazil's first report happened at a particularly fortuitous moment.

Soon after the publication of the 1996 report, a decision was made to adopt an Atlas format for displaying state and municipal indexes, a strategy that has been maintained ever since. In 1998, together with the Atlas format that was then displayed in a CD-Rom, an NHDR was printed but distribution was canceled. The displaying of municipal indexes, which became known as Human Development Index-Municipality (HDI-M), was also launched at a fortuitous moment because the federal government had just started to implement the 1988 constitutional principle of decentralization, which in Brazil meant municipalization of social services, particularly primary education and health care.

The format of the NHDR as an HD Atlas was introduced in 1998 and a new Atlas was published in 2003. The 1998 Atlas won the UNDP Award for Human Development. The 1998 Atlas presented two innovations. Firstly, it introduced municipal indexes (state indexes were already in the 1996 report), thus reaching a much broader audience. HDI-Ms were then divided into two: Living Conditions Index and Municipal Human Development Index. In the 2003 Atlas, they were integrated into only one for the sake of simplicity. Secondly, accessing HD indicators was aided by the design of software developed in Brazil.

This series of national, state and municipal indexes provides detailed disaggregated data and is now available on an electronic database with information on 135 HD indicators for all 26 states, the federal capital (Brasília) and for all 5,507 Brazilian municipalities.

An Atlas with disaggregated state and municipal indexes covering the entire country was the result of a successful initiative to disaggregate the index of the state of Minas Gerais to the municipal level, a task undertaken by a state government agency, the Fundação João Pinheiro (FJP) based in Minas Gerais' capital, Belo Horizonte. This initiative had two important consequences. Firstly, the state government of Minas Gerais introduced the 'Robin

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<sup>5</sup> Figures about Brazil's annual rate of inflation are presented in Table 4 below.

Hood Law', which ensures that more state tax revenue is allocated to municipalities that rank low on the index and perform poorly on a number of other social and environmental indicators. Secondly, the municipal indexes were presented to President Cardoso who became an enthusiast of this particular HDP. What made these indexes so attractive was the simplicity of their presentation and the ease with which the data could be accessed. As a result, Cardoso invited the head of the FJP to become IPEA's President. FJP was then responsible for the elaboration of the 1998 and the 2003 state and municipal indexes for the entire country, with the assistance of one of IPEA's most prominent economists, Ricardo Paes de Barros. From then on, the Atlas format has been adopted in all HDPs.

The presentation of indexes was highly praised by all the interviewees. Accessing the 1998 and the 2003 Atlases is easy and self-explanatory. The 1998 Atlas is displayed on a CD-Rom and the 2003 Atlas is also available on the UNDP site as well as on its partners' sites. The software allows users to create their own analytical tools when accessing the data: thematic maps, tables, graphics and rankings. The information can be either printed or exported to other programs through, for instance, electronic spreadsheets. The main principle driving the process is to facilitate access to very detailed data, which was previously scattered on several websites and used unfriendly software that did not allow users to tailor the data to their own needs, and which were difficult to download.<sup>6</sup>

In 2004, a Racial Atlas was launched. Although it was launched in Congress, interviewees agree that it received less media attention than the previous Atlases.<sup>7</sup> However, it received considerable support from certain policy makers and the black community.<sup>8</sup> It also had the support of several parliamentarians because Congress has a caucus advocating racial equality, despite Congress' lack of interest in racial issues, as reported by a member of that caucus. The Racial Atlas was also launched at a particularly auspicious moment, when the federal government and some state governments had just introduced, or were discussing, affirmative action policies targeting Brazil's black population.<sup>9</sup>

The technical leadership of the Racial Atlas was granted to CEDEPLAR, a research centre within the Federal University of Minas Gerais, and was fully financed by UNDP. The Racial Atlas does not use the same software as the HD Atlases, but instead uses UN DevInfo, which was developed based on UNICEF's software ChildInfo. However, unlike the HD Atlases, this software has had many problems concerning input and access, an issue identified only when the CEDEPLAR team and members of the black movements were

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<sup>6</sup> As mentioned by some interviewees, the software was designed in such a way that ministers could access the data themselves without the help of their staff.

<sup>7</sup> As reported by the journalists interviewed, the media does not recognize the relevance of racial and gender issues in Brazil. They argued that the average journalist believes that racial and gender inequalities can be addressed by a good public education system.

<sup>8</sup> The acceptance of policy makers can be seen from the view of the Minister for Racial Equality Policies. This ministry was created in 2003, when the new federal government was elected. According to the minister, a new agency like this lacks technical skills; hence the Atlas helped build technical capacity. As for acceptance among the black movements, their positive reaction can be seen on their websites. On one website, for instance, the media's approach to the data and the issues raised by the Atlas were criticized, but a UNDP representative's analysis of the issue of discrimination in the media was complemented. However, they have shown skepticism as regards the influence of the report in changing policies.

<sup>9</sup> The main policy is to set aside a number of places (quotas) in federal and state public universities to be filled by blacks.

interviewed. The CEDEPLAR team interviewed also mentioned other problems: (a) the lack of expertise among UNDP staff to help to find solutions to the data inputting problems, which led to a delay in solving these problems; (b) too short deadlines because of political commitments;<sup>10</sup> and (c) lack of skills of UNDP staff to understand the indicators, because of which CEDEPLAR had to get involved in the dissemination process.

As a consequence of the Racial Atlas, a new NHDR is now under way, focusing on race, inequalities and violence. The latter issue has been identified in opinion polls as the main concern of those living in large Brazilian cities. The focus on violence as one of the three themes of the forthcoming report shows that the UNDP team has the ability to identify and to incorporate into HDPs key emerging issues on the country's agenda, as also happened with other HDPs.

Despite the existence of many enabling conditions mentioned above and the appropriateness of the decisions taken, it is important to understand the subjective reason behind the success of HDPs in Brazil. A great number of interviewees argued that Brazilians in general and the media in particular are obsessed by figures and statistics, particularly if they are synthetically and easily presented as HDIs are. Other interviewees pointed out more specific reasons: (a) the country's long history of inflation and hyperinflation has made Brazilians familiar with the use of indexes; (b) as the country is passionate about soccer and about the World Cup soccer competition, following the ups and downs of the country, the states, and the municipal positions in the rankings is attractive because competition is part of the country's culture. As one interviewee put it, the indexes cause commotion whenever displayed. And as former President Cardoso explained, Brazilians are more competitive than analytical, making the indexes more important than reports.

The trajectory of HDPs in Brazil shows that crucial decisions have been made throughout the experience, most of them successfully putting HD principles high on the Brazilian agenda. On the demand side, the country's political, social, intellectual and economic conditions have enabled broad acceptance of HD principles and contributed to the popularity of HDPs. Furthermore, HDPs have tackled "the right theme at the right time". Of particular importance is that the themes chosen to be singled out in HDPs address specific issues that have just come onto the political agenda. These are generally old issues that have been part of the country's history for centuries, in particular social, regional and racial inequalities, but have only recently entered the political agenda. UNDP stakeholders have also done things "in the right way", meaning that they realized the importance of media support and of a user-friendly and easy access to the data from the start. On the supply side, to be further discussed below, innovation, strategic partnerships and UNDP leadership have also contributed to sustain the success of HDPs.

The success of HDPs goes beyond its marketing strategy, the enabling conditions mentioned above and the capacity of UNDP to address key issues. HDPs have influenced policy making at all levels of government, a point also addressed below.

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<sup>10</sup> According to CEDEPLAR's team, the Racial Atlas had to be launched on the day of the celebration of Black Consciousness. This deadline was accepted by CEDEPLAR without knowing the problems they would face with the software.

### 3.1 The production process

The elaboration of HDPs takes on average 18 months. The costs of HDPs vary as much as sources of funding. According to Mr. Libânio, the Atlas format is cheaper than a printed report. In general, the costs of HDPs are shared with other partners, with the exception of the 1996 NHDR and the 2004 Racial Atlas, both fully financed by UNDP. According to Mr. Libânio, their costs also vary according to the exchange rate.

From the first report it was decided to delegate the technical coordination of the production process to partners and to hire consultants to produce HDPs, instead of having a permanent team at UNDP. According to Mr. Libânio, this decision prevents HDPs from being policy-oriented, a view not shared by many interviewees, who are satisfied with the current content and format of HDPs. A journalist is always in charge of reviewing the HDP texts, a strategy introduced in the 1996 report.

As mentioned above, the themes/issues that HDPs highlight and the indexes selected have always reflected the main issues on the Brazilian agenda at the time of the production of the HDP. The 1996 NHDR not only discussed Brazil's socioeconomic and regional disparities, a historically unresolved problem, but it also challenged a consensus that there were two Brazils, one rich and one poor. The report, based on data and analyses, came out with a different and more complex description of Brazil's disparities. It revealed the existence of three Brazils: an area with a high level of human development, equivalent to Belgium; an area with a medium level of human development, equivalent to Bulgaria; and an area characterized by low levels of human development, equivalent to India. This new 'human development map', which has been highly incorporated in policy making, differs not only from the consensus mentioned above but also from the traditional geographical map that divides Brazil into five regions. The 1996 report also addressed the need to operationalize constitutional mandates towards decentralization of social services, a policy adopted by the federal government in the late 1990s, particularly the municipalization of primary education and of health care.

The 1998 HDP was divided into two: a printed report and an Atlas, although it was not yet called an Atlas. The latter introduced HDI-M for the first time. FJP, which had elaborated the municipal indexes for the state of Minas Gerais, was introduced as a permanent partner for the Atlas. The coordination of the report and of the Atlas was shared between UNDP, IPEA and FJP. The printed report, however, was withdrawn from distribution. The 1998 report, while stressing the persistence of the problems pointed out in the 1996 report (regional and social inequalities), took a very positive view of the progress made, especially in education indicators and in the upgrading of Brazil's position in the world HDI ranking. However, this enthusiasm was not accepted by many and was dampened by the following HDR. According to one interviewee, the consultants in charge of the analytical part of the written report were wrongly chosen. The written report might also have been influenced by electoral politics because it was printed one month before the national elections when President Cardoso was running for reelection.

The 1998 Atlas, however, became a great hit. The launching of detailed and disaggregated data on the living conditions of the population of each state and of each municipality had a great impact, which indicated the appropriateness of the strategy to disaggregate the data, to opt for a 'supplementary' municipal index, and to display the data.

As pointed out by most of the interviewees, HDPs became widely known and started to attract media attention because of the Atlas format coupled with municipal indexes.<sup>11</sup> Policy makers interviewed argued that the desegregations of the indexes became more important for policy making than the position of the municipality in the ranking. Furthermore, this was the first time that Brazilians, including policy makers and politicians, had access to a comprehensive overview of the situation of Brazilians living in the country's hinterland. The vulnerable living conditions of this section of Brazil's population had hitherto been little documented or were masked by statistics reflecting averages, which did not really highlight regional and local differences. This approach is particularly important in a country of continental dimensions with great socioeconomic differences.

The success of the Atlas format was consolidated with the 2003 Atlas. It was produced by the same organizations responsible for the 1998 Atlas - UNDP, IPEA and FJP – and CEDEPLAR was responsible for demographic data and analysis, later becoming the main producer of the Racial Atlas.

The contents of the 2003 Atlas are as follows: Understanding the HDI-M and which indicators are used; Development and racial inequalities in Brazil; Education: progress and challenges; Income inequality increases in 2 out of 3 Brazilian municipalities; Evolution of the HDI-M: municipalities with less than 50,000 inhabitants; Evolution of the HDI-M: municipalities with over 1 million inhabitants; Evolution of the HDI-M: municipalities with between 500,000 and 1 million inhabitants; Evolution of the HDI-M: municipalities of between 50,000 and 500,000 inhabitants; Relative evolution of the HDI-M in the states; Metropolitan regions.

Each theme mentioned above includes a brief description of the indicator, and a comparison of the data from 1991 and 2000, the years of the national censuses. By highlighting for the first time the living conditions of those living in Brazilian metropolitan regions, the 2003 Atlas quickly became part of this debate, which had been recently re-introduced on the Brazilian agenda.

The 2004 Racial Atlas deals not only with a sensitive issue – racial inequalities in a country whose average population praises itself as a healthy melting pot – but it also targets a well organized and highly politicized community. It presents data and analyses disaggregated according to race (white and black), and whenever statistics were available, also according to gender. It is divided into seven thematic sections: demography; health: conditions and access; reproductive health; family and housing; education; work and income; workers' rights and social security benefits. More than 100 social indicators of race, and, whenever available, gender, for Brazil's five official regions and for all states are displayed. Some themes were chosen to receive an analytical approach: child labour and women labour; indigence and poverty; infant mortality; adolescent pregnancy; life expectancy; and access to health care. The data is from the 1980, 1991 and 2000 censuses, plus three other national and regional surveys. It is the first HDP to connect its objectives to the Millennium Development Goals (MDGs) and to the UN World Conference on Racism held in Durban in 2000.

States' indexes are drawn up from data based on National Household Surveys carried out every year. Data for municipal indexes, however, are from national censuses, which are

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<sup>11</sup> According to many interviewees and all the journalists interviewed, printed reports are little read, whereas the Atlas format and the media attention promote the circulation of the information.

carried out every 10 years. The impossibility of having updated data for municipalities was a matter of concern for some policy makers interviewed. The reason for this concern is that local politicians are using the index without taking into account the time gap. According to one interviewee, municipal indexes were not constructed to be used in the ways local politicians are using them. The same interviewee stressed that often the situation of a municipality improves or worsens as a result of policies other than education and health and due to other events such as migration. In other words, municipalities' positions in the rankings are sensitive to changes in areas not always related to HDI-Ms. Furthermore, municipal indexes are being used as a tool for electoral politics, which are held every four years – an insufficient time span to evaluate changes, despite the use of statistical methods for estimating change. According to one interviewee, changes in HD variables are very slow and when the position of the municipality does not improve, mayors get frustrated.

However, there was a consensus among interviewees that municipal indexes have made mayors more aware that they should pay close attention to education and health care, not only because these policies have been municipalized, but also because municipal rankings have raised their constituencies' awareness and have attracted the attention of Brazilians all around the country. Furthermore, it has also had a positive impact on local policy makers who, according to one interviewee, lack expertise; HDI-Ms are easy for them to understand and to use for planning.

The same misunderstanding applies to state governors, although data at the state level are annually updated through the National Household Survey. As reported by the World Bank representative in Brazil, a former governor of Ceará, who had a constant dialogue with World Bank advisors, used to complain that the state's HDI was not improving despite heavy investment in education and health care during his eight-year term. According to the interviewee, it is difficult for politicians to understand the gap between policy design, implementation and outcomes. Another interviewee reported the same situation in the state of Mato Grosso. The governor committed himself to improving the state's position in the ranking. At the end of his term, the experience was evaluated and the results were frustrating. The team of consultants hired for this evaluation had a hard time explaining that although the policies adopted were in the right direction, changes are slow and should not be expected to happen in a governor's term.

Despite these misunderstandings, state level politicians agree that HDIs have had an important impact in the states. The state governor of Ceará argued that before the disaggregating of HDIs, it was impossible for an economically worse-off state to have its performance known to a broader audience because state policies have limited or no role in macroeconomic policies. Hence, little could be done to increase a state's GDP. With the introduction and the wide acceptance and visibility of HDIs, a poor state like Ceará attracted the interest of Brazilians from other regions, of academics, and of the international media, such as *The Economist*.

Misunderstandings about HDIs are also in the media. One journalist pointed out that if there is heavy investment in social programmes in a particular municipality, many journalists fail to understand why its HDI has not improved or even worsened.

### 3.2 The dissemination process

One of the reasons for the success of HDPs in Brazil is the dissemination process, which has always been undertaken by UNDP. Since the 1996 report, dissemination has been regarded as crucial for keeping HDPs and HD principles high on the agenda. There has been a clear strategy to attract media attention to HDPs. This strategy implies establishing close links with journalists; hence they have become the main partners in the dissemination process.

The strategy to make the media a partner has several aspects: (a) the launching of the HDP always involves high profile politicians, policy makers and institutions;<sup>12</sup> (b) journalists receive well-elaborated embargoed briefings from UNDP, allowing them sufficient time to analyse the results; (c) training courses are made available to them; and (d) awards are granted to newspapers and journalists for coverage, mainly by private and non-governmental organizations.

The strategy of making journalists partners has resulted in great payoffs. Firstly, attracting media attention is a good way to also attract politicians' attention. Secondly, it provides high visibility to HDPs. All interviewees stressed the role of the media in the success and the impact of HDPs in Brazil.

The media coverage has been monitored by UNDP since the launch of the 1996 report. Because indexes are highly cherished in Brazil, media coverage is not restricted to the day the HDP or the HDR is launched. It also provides further analysis of the main subjects of HDPs, generally relating them to a broader analysis about the country's social conditions. Signed articles are written after the launch of the report, making use of HDIs as an analytical tool and keeping the topic in the media after the launching event. HDPs are headline news in the most important national newspapers and weekly magazines, and are discussed in editorials and in signed articles by journalists, politicians and academics. All the journalists interviewed were very enthusiastic about HDPs – more so than any other category interviewed.

Based on follow ups contracted by UNDP, Table 1 summarizes the attention given to HDPs in the mass media.

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<sup>12</sup> The 1996 report, for instance, was launched with a video tape of President Cardoso praising the report. The 2004 Racial Atlas was launched in Congress.



**Table 1 – Mass media coverage of HDPs and of HDRs (1)**

HDP/HDR	Number of appearances (2)	Number of readers/viewers	Cost of coverage, if charged
1996 NHDR	142 (3)	27,960,000 (3)	
1996 HDR	98 (3)		
1997 HDR			R\$ 960,597(4)
1998 Atlas (5)		21,046,820/day	\$ 4,518,774
1999 HDR		5,596,000/day	\$ 3,955,729
2000 HDR	183		\$ 1,597,129
2001 HDR	305		\$ 1,751,609
2001 Rio de Janeiro	462	5,049,800	\$ 4,517,044
2003 HDR		6,772,200	\$ 3,178,260

Notes: (1) Because the reports were produced by different companies, they do not always present the same information. (2) Figures are from the most important regional and national media and, since 2001, also from the Internet. (3) Only printed press; (4) Only TV coverage. (5) The follow-up of the 1998 report estimated that 70% of readers belong to A/B classes, 53% are women, and 50% are between 20 and 40 years old.

Although the follow-up reports evaluated the media coverage as being highly positive, they also mention a few criticisms in the media. Some are by state level politicians unhappy with the ranking position of their states, while others challenge the methodology and the results. The greatest controversy, however, is generated when Brazil's position in the world HDI ranking falls, which happened in 1997, 1999 and 2004. Surfing several news media sites, it is clear that the 2004 fall was difficult to explain to the general audience because Brazil, under the administration of President Cardoso (1995-2002), gave high priority to primary education and health care, two of the three indexes that compound the HDI. Falls also provoke reactions from national politicians.<sup>13</sup> UNDP spokespersons have systematically explained these falls as a result of changes in methodology or/and the use of outdated data by UN agencies. This shows that many Brazilians and most politicians see the position of the country in the world ranking as similar to a World Cup competition. Despite the falls in the ranking and the difficulty of accounting for them, many interviewees argued that they had not damaged the credibility of HDIs.<sup>14</sup>

### 3.3 Partnerships

Partnerships built by UNDP with governmental and non-governmental agencies since the very beginning are also responsible for the success of HDPs. Of particular importance is the partnership with IPEA, a 30-year old respected think-tank, now not only restricted to HDPs.<sup>15</sup>

Building close ties with IPEA was advantageous for both organizations. UNDP benefited from IPEA's technical expertise and from attracting the attention of the federal government – the main policy maker in Brazil – to HD principles, thus opening the way for the use of HDIs in policy making and for the government's commitments to HDPs and to HD

<sup>13</sup> It was reported that when the 1999 HDR was launched, the federal government's representative attracted media attention by labeling UNDP methodology schizophrenic. His reaction was commented on in the media and received a strong reaction from readers, who interpreted the position of the government's representative as lack of knowledge of Brazilian reality.

<sup>14</sup> Few interviewees remember these episodes, not even the fall registered in the 2004 HDR.

<sup>15</sup> According to an IPEA policy maker interviewed, this partnership now involves the publishing of an economic journal, joint research projects, UNDP support for events and for hiring consultants to IPEA and the writing of the Brazilian MDG report, all of which indicate that UNDP and IPEA share a common agenda.

principles. Furthermore, the indexes' methodology requires access to micro data produced by IBGE, Brazil's statistics agency, not available to non-governmental institutions. IPEA benefited from UNDP financial resources, and UNDP support also helped make several research projects viable by overcoming bureaucratic procedures that generally constrain or delay government projects. "Without UNDP support, many research projects would not have been done", said IPEA's policy maker when interviewed.

With the technical assistance of IPEA, UNDP has broadened its domestic network. It has hired FJP to produce state and municipal indexes. FJP, a state government agency, has also benefited from its permanent role in HDPs. It has acquired national visibility and has been a consultant in the elaboration of neighbourhood indexes in Rio de Janeiro and Recife, thus broadening its financial resources and keeping the self-esteem of its technical team high, who are not paid extra for producing the indexes. According to Ms. Marques, the current head of FJP, UNDP paid R\$ 80,000 (approximately US \$32,000) for the production of the 2003 Atlas and R\$ 40,000 (approximately US \$16,000) for the Recife Atlas. FJP intends to increase its role in HDPs: it has submitted a project to UNDP to create video tapes about HD principles to be shown in schools.

Partnerships with UNDP were also seen by the majority of the interviewees as a great asset for governmental institutions. This is because opinion formers and the media are generally suspicious of the influence of party politics on governmental agencies. Although academics do respect institutions like IPEA and IBGE, the same cannot be said of the media. According to one journalist interviewed, there were rumours in the media that IPEA was postponing the results of one HDR because "it was not favourable to Brazil". Rumours of this kind put the credibility of HDIs at stake. Both the former and the current federal administrations, according to the same journalist, have shown uneasiness and have reacted badly to HDRs when Brazil's position has decreased in the world ranking. This does not mean, however, that they suspect data manipulation but rather that there is a call for UNDP to keep its leading position and not to be replaced either by governmental or non-governmental organizations.

Another reason for maintaining UNDP's leading role is related to accessibility of data. HDIs of Rio de Janeiro illustrate this point: there are complaints among some interviewees that the data is not available to the general public, a point confirmed when surfing the city hall's site ([www.rio.rj.gov.br](http://www.rio.rj.gov.br)), which only displays a few index tables.

In 2002 another permanent partner was added – the Catholic University of the State of Minas Gerais – to provide training courses. It has set up an organization - the Institute for Sustainable Human Development (IDHS) - for this purpose. Mr. Libânio undertook this initiative to create a university nucleus for capacity building on the various dimensions of HD. The IDHS provides the space, the administrative structure and the faculty. UNDP provides a share of the financial resources. Courses are paid for by the organizations that send their representatives to take them. Course attendees come mainly from local governments, NGOs, the media, churches and community councils. Training courses are also provided on the Internet and some have been taught outside the city of Belo Horizonte. The results of courses provided by IDHS are shown in Table 2.

**Table 2 – Training courses given by IDHS, August 2004-July 2005**

Course	Number of Hours	Number of Students
Introduction to HD: concepts and measurement	32	35
Introduction to HD: concepts and measurement	8	40
First Workshop	12	150
Update of social indicators	28	50
Introduction to social indicators	12	22
Introduction to HD: concepts and measurement	32	33
Introduction to social indicators	12	50
Reading and interpretation of social indicators for journalists	9	50
Total		430

Note: Two of the courses were taught through the Internet

Training courses for journalists are crucial to avoid the media trend of treating the indexes as ‘elevator’ statistics, focusing exclusively on the ups and downs of the indexes.

Plans to broaden training courses have been submitted by IDHS to UNDP. They include a 360-hour course and new courses on racial indicators. The IDHS is translating Amartya Sen’s book, *Development as Freedom*, and is negotiating its publication with UNDP. It is also planning to offer these courses in other cities, with the help of UNDP’s recently inaugurated decentralized offices.

### 3.4 Strategic position

The strategic position of HDPs can be assessed by analysing (a) UNDP’s presence in the media; (b) the relationships between UNDP and UN sister agencies coupled with HDPs’ influence on the agenda of multilateral organizations in Brazil; and (c) HDPs relationship with other UN programmes such as the MDGs.

UNDP’s presence in the media has been monitored together with the impact of HDPs mentioned above. Although HDPs and HDRs are launched in Brazil by UNDP, the name United Nations is more cited than UNDP, as shown in Table 3. During the launch of the 2000 HDR, for instance, the name of the UN was in the headlines of 10 printed newspapers and UNDP was named in two. In the news about Rio de Janeiro’s 2001 HDIs, the acronym UN was in 9.2 percent of the headlines and UNDP in 1 percent. Quite often, the UN name is used to stress the credibility of the publication. According to a journalist interviewed, few journalists are aware that UNDP, IPEA and FJP are the main producers of Brazilian HDPs. They think it is the United Nations, not even UNDP Headquarters.

**Table 3 – References in the media to the UN and UNDP**

HDPs/HDRs	UN	UNDP
1996 HDP and HDR	191	103
2000 HDR	40%	36%
2001 HDR	39%	20%

However, among the policy makers and academics interviewed, UNDP was seen as leading the production of HDPs and as an important actor influencing policy debate.

The relationships between UNDP and UN sister agencies in HDPs are scarce. One policy maker interviewed said that UN organizations in Brazil are lost and searching for a new role, whereas UNDP is important and has played an important role in policy dialogue.

An economist from the Economic Commission for Latin America and the Caribbean (ECLAC) stated that the ties between ECLAC and UNDP are limited to thematic affinities, such as poverty and education. The deputy director of ILO regretted the lack of data about unemployment and informal labour in HDPs, which according to him are crucial issues in Brazil. We were told that ILO and UNDP have been in discussion about making this the theme of the next HDR.

Despite the lack of a direct relationship between UNDP and UN sister agencies, there is evidence that the latter play a role in creating incentives for disseminating HD principles and for the use of HDPs. The former governor of the state of Ceará, for instance, reported in his interview that he counted on a UNICEF seal of approval to award mayors who had performed well in policies targeting children. He also had an agreement with UNICEF to evaluate the performance of a highly praised state programme, the health care agents, implemented in Ceará and later adopted in every Brazilian state.<sup>16</sup>

The World Bank representative in Brazil argued in his interview that the World Bank not only uses but values HDIs in its dialogue with the states when negotiating loans. Decisions on how to select policies and territories within the states to be financed by the World Bank take HDIs as the main indicator, although the borrower is the ultimate decision maker. As for competition between World Bank annual reports and HDRs, he recognized that the former were not as well-known as HDPs. We should add that because World Bank reports are policy-oriented, they are the subject of much criticism among policy makers, academics and advocacy groups.

The relationship between HDP and other UN programmes is more clearly related to the MDGs. IPEA is responsible for Brazil's MDGs because they involve the majority of federal agencies, and UNDP is a partner.<sup>17</sup> None of the interviewees familiar with the MDGs saw HDPs and MDGs as overlapping or as complementing each other, mainly because HDPs do not incorporate all the dimensions of the MDGs. Furthermore, the MDGs deal with broader issues and policies, whereas HDIs are seen as a tool for targeting states and municipalities for social programmes. Because some of the MDGs have already been achieved in Brazil, such as those related to infant mortality and school enrolment rates, they have attracted less attention than HDIs. Policy makers' efforts regarding the MDGs are aimed at adjusting them to Brazil's heterogeneity because on average Brazil performs relatively well. The interviews indicated that HDIs and HDPs are more well-known in Brazil than the MDGs. One interviewee suggested that one of the reasons for the greater popularity of HDPs vis-à-vis MDGs is due to the friendliness of the former's software. Only one interviewee argued that in the long run the two should be intertwined and another that if the MDGs are to be disaggregated to the municipal level, there would be competition between these two products. The majority of those interviewed see HDPs and the MDGs as two important tools with different dimensions, which should remain separate as regards the organizations in charge.<sup>18</sup>

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<sup>16</sup> This programme has been documented and analysed by Tendler (1997).

<sup>17</sup> UNDP has also played an innovative role in MDGs. An example was the idea to finance a Samba School in Rio's world famous Carnival about the objectives of the MDGs.

<sup>18</sup> One interviewee was very critical of MDGs because of its target rationale, which, according to him, contradicts the UN principle of universal policies, hence making UN too similar to multilateral organizations in developing countries and distancing itself from the goals of UN Conferences.

### 3.5 Influences

HDPs in Brazil have been particularly influential in two main domains: (a) as a targeting tool for selecting states and municipalities for federal and state social programmes and (b) intellectually, including in becoming an important variable for the analysis of social issues. These two domains can be measured in quantitative terms. Other influences were also mentioned by the interviewees, but these do not lend themselves to measurement.

Before presenting data showing the role of HDIs as a tool for selecting states and municipalities for federal and state social programmes, it is necessary to discuss the importance of federal resources vis-à-vis state and municipal resources in the Brazilian federation. As shown in Table 4, public resources have increased vis-à-vis GDP; the federal government remains the largest tax collector; the states' financial resources have been reduced in the economic stabilization period vis-à-vis other levels of government; and the municipalities have increased their revenue mainly as a result of the municipalization of health care and primary education programmes. This reflects a new macroeconomic agenda that has promoted re-centralization of resources at the federal level and led to an unprecedented increase in the collection of federal taxes as compared to GDP to fulfill debt commitments and to achieve budget surpluses.

**Table 4 –Brazil: Main fiscal indicators, 1985-2004 (%)**

Regime	Year	Revenue/GDP	Annual Inflation Rate	Distribution of Revenue			
				Federal	State	Local	Total
Military (1964-85)	1985	24.1	235.1	62.7	26.2	11.1	100
	1986	26.2	65.0	60.9	27.0	12.1	100
	1987	23.8	415.8	64.1	23.3	12.6	100
Constitutional Process (1988-94)	1988	22.4	1 037.6	62.3	26.9	10.8	100
	1989	24.1	1 782.9	61.1	25.0	13.9	100
	1990	28.8	1.476.7	58.9	27.6	13.5	100
	1991	25.2	480.2	54.6	29.6	15.7	100
	1992	25.0	1 157.8	56.9	28.1	14.9	100
	1993	25.8	2 708.2	57.8	26.4	15.8	100
	1994	29.8	1 093.9	59.3	25.1	15.6	100
Stabilization (1994-present)	1995	29.4	14.8	56.2	27.2	16.6	100
	1996	29.1	9.3	56.0	27.6	16.3	100
	1997	29.6	7.5	56.2	27.7	16.1	100
	1998	29.6	1.7	56.2	26.6	17.2	100
	1999	31.7	20.0	57.0	26.0	17.0	100
	2000	32.7	9.8	56.7	26.4	16.9	100
	2001	33.6	10.4	57.4	25.9	16.7	100
	2002	34.9	26.4	57.9	25.5	16.7	100
	2003	35.8	9.43	59.0	24.8	16.1	100

Source: Souza (2005: 4)

Note: Subnational revenues include taxes directly collected by the subnational agencies, constitutional transfers from the federal government to states and municipalities and from the states to the municipalities, plus transfers to the municipalities to provide primary education and health care services.

The figures presented above show that UNDP's strategy to develop partnerships with federal agencies has targeted the main financier of social programmes in the federation. This has also made the introduction, for the first time, of a mechanism of territorial planning for federal programmes possible. This is an important tool in a country of continental dimensions and in which targeting territories is likely to be influenced by party politics and

by the electoral cycle. By building partnerships with the federal government, UNDP has become an important actor in influencing policy dialogue.

### 3.5.1 Influences on federal policies

The federal government has used HDIs as a targeting tool for social programmes, particularly during the Cardoso administration. Over that eight-year period, HDIs were used for selecting states, municipalities and families for four main federal projects:

- *Alvorada* (Dawn), launched in 2000 “to improve the living conditions of the most needy in the shortest term possible”
- *Bolsa-Escola*, a monthly allowance for families for keeping their children in school, approved in April 2001 (Law 10, 219)
- *Alimentação Escolar* (School Meals), approved in March 2001 (Provisional Measure no. 2,100)
- *Bolsa-Alimentação*, a monthly allowance for pregnant women and children from 6 months to 6 years and 11 months old, approved in August 2001 (Provisional Measure no. 2,206)<sup>19</sup>

Of the above mentioned projects, *Alvorada* was the most important in terms of its territorial impact because it covered most Brazilian states, micro-regions and municipalities selected from those with an HDI lower than the Brazilian average using the 1998 HDI. The *Alvorada* project reached 24 states and 2,185 municipalities, covering a population of over 36 million poor people. It put together 16 subprojects, including the *Bolsa-Escola*, and eight of these subprojects were for health care and primary education. *Alvorada* was discontinued in 2003, when a new federal government was elected, although some of its subprojects have been re-allocated to other federal programmes. Table 5 displays the amount of resources for poverty alleviation transferred from the federal government to state and local governments, but mainly to the latter, and directly to poor families, through the *Alvorada* project.

**Table 5 – Federal resource allocation through the *Alvorada* project**

Year	Amount in R\$	Approximate amount in US\$
2000	887,100	354,800
2001	4,189,614	1,676,000
2002	3,311,768	1,324,800

Source: Extracted from [www.presidencia.gov.br/projetoalvorada/alvorada.htm](http://www.presidencia.gov.br/projetoalvorada/alvorada.htm)

Although the *Alvorada* plan asserted that states and municipalities were to be targeted on the basis of their HDIs, some interviewees mentioned that the mayors’ party affiliation was also taken into consideration.

The most important policy change that occurred in Brazil and which is related to two HD variables – health care and primary education – was implemented in the late 1990s. Changing the design and the financing of health care and primary education was approved in

<sup>19</sup> Another well-known social programme of Cardoso’s administration, the *Comunidade Solidária* (Solidary Community) was created in 1995, before the production of HDI-Ms. Thus, it did not target municipalities based on HDIs indicators.

Congress through constitutional amendments, which require a qualified majority. They have increased resource allocation and promoted municipalization of these two policy areas by earmarking federal, state and local taxes. The design of these policies has created a complex system of incentives and constraints to attempt to make local governments accountable for social policy implementation and to universalize these policies.<sup>20</sup> The health care programme injects additional resources into the local purse. The primary education programme penalizes municipalities that fail to improve school attendance rates at the primary level, and, at the same time, brings extra resources to poor municipalities and supplements teachers' salaries in poor communities. The results of these two changes, in quantitative but not in qualitative terms, have been widely praised. The enrolment rate in municipal schools increased from 40.7 percent in 1997 to 55 percent in 2004. There is a consensus that this policy has played a key role in increasing enrolment rates over the period, particularly in small and poorer municipalities, which rely more heavily on transfers from higher levels of government as a source of revenue. In 2004, R\$ 4.8 billion (approximately US \$2 billion) was invested in 3,544 poor municipalities (see [www.mec.gov.br](http://www.mec.gov.br)). Enrolment rates are now nearly universal for primary and lower-secondary education.<sup>21</sup> As for the health care programme, investment increased from R\$ 31 billion in 1998 (approximately US \$12.4 billion) to R\$ 44 billion (approximately US \$17.6 billion) in 2004, more than one third accruing from the federal government.

Although HDIs were not used as an indicator for targeting territories in the above mentioned policy changes as they were designed to be universal, HDIs did play a role in stimulating the federal government to look for new methods to increase health and education indicators. These two social policies were seen as the benchmarks of the Cardoso administration. This experience demonstrates that more than constitutional mandates, regulations, business interests, or management capacity are required to implement social policies. Rewards and sanctions, universal and steadfast rules and the support of the federal executive in regularly providing resources have been shown to be the most important variables in the success of policies to improve access to these social services.

In January 2003, a new political coalition was elected to the federal government. Its main social programme became *Fome Zero* (Zero Hunger) and *Alvorada* was terminated. *Fome Zero* encompasses and expands other existing social programmes but the states, municipalities and families targeted are no longer based on HDIs but rather on income per capita. The monthly allowance to families, *Fome Zero*'s main project, had reached 6.5 million families by the end of 2004. In addition, a unified register of families entitled to receive allowances from four previous programmes aiming at income transfer was set up (see [www.fomezero.gov.br](http://www.fomezero.gov.br)). Previously, income transfer programmes had been scattered across several governmental agencies. Although these programs were all under the *Alvorada* Programme, they were administered by different agencies, making their management and supervision difficult.

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<sup>20</sup> This does not mean that all Brazilians use the public systems. The state health care system became universal with the 1988 Constitution and in practice it is used by only half the population; 24.45% of the population have private insurance and the remaining buy their own health services directly (see [www.datasus.gov.br](http://www.datasus.gov.br)). As for education, in 2003 the enrolment rate at primary public schools was over 31 million students and in private schools over 3 million (see [www.edudatabrasil.inep.gov.br](http://www.edudatabrasil.inep.gov.br)).

<sup>21</sup> For an analysis of this experience in English, see Melo and Hoppe (2005).

Although HDIs are no longer used to target the main federal government social programme, they are still being used in other programmes such as:

- Youth and Adult Education, aimed at those who have dropped out of school, and sets aside a larger percentage of resources for municipalities with an HDI lower or equal to 0.500 (see [www.mec.gov.br](http://www.mec.gov.br)).
- Electricity for All, which provides electricity to poor communities selected on the basis of HDI (see [www.mme.gov.br](http://www.mme.gov.br)).
- Basic Sanitation, which encompasses municipalities with a lower HDI and with up to 30,000 inhabitants and reaches around 1.7 million families (see [www.planejamento.gov.br](http://www.planejamento.gov.br)).
- Young Agents for Social and Human Development Programme, which provides an allowance for adolescents between 15 and 17 years old to remain in school with the aim of preventing violence, drug use, and adolescent pregnancy; this programme invested over R\$ 43 million (approximately \$17 million) in 2004 (see [www.mds.gov.br](http://www.mds.gov.br)).
- Food Security for families living below the poverty line, which reaches 568 municipalities (see [www.fomezero.gov.br](http://www.fomezero.gov.br)).

However, other federal government programmes aimed at overcoming social and regional inequality have not used HDIs as a targeting tool. For example, the Digital Inclusion Programme, as well as other programmes from the Ministry of Science and Technology. The programmes target the Northeast, where the Minister comes from, as a priority, but selections are not made on the basis of any indicator.

Despite the relatively recent decrease in the importance of HDIs as a targeting tool, most interviewees argued that Brazilian Presidents are under pressure, particularly from the media, to adopt HDIs as a targeting tool.<sup>22</sup> However, the current governing coalition is led by a political party with a leftist tradition, thus it is possible that there is a tension between the adoption and the deepening of social policies targeting specific segments of the population and the leftist tradition of favouring universal social benefits.

While HDIs have been used as a targeting tool, they have not really been used as a performance tool. As a matter of fact, there is evidence that evaluation is the weakest facet of the public policy chain in Brazil. There are calls from policy makers, particularly from the Finance Ministry, to adopt performance tools and evaluation criteria to measure investment in social policies. They argue that this should allow for more effective negotiations between ministries in charge of social programmes and the Finance Ministry.

### **3.5.2 Influences on the federal legislature**

The influence of HDIs as a targeting tool is as high in Congress as it is on federal policy making. This is particularly true among parliamentarians from the poorest states, who see the use of the indexes as a way of bringing extra resources to the states and municipalities they

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<sup>22</sup> Cardoso's acceptance of HDIs has been documented in other parts of this report. One interviewee stated that the current President, Lula da Silva, has received the UNDP representative to discuss HDPs.



represent. Parliamentarians have taken several initiatives using HDI-Ms as a targeting tool for federal policies, although very few bills put forward by them have been approved so far. One exception was an amendment to a law (Federal Law no. 11,079 issued in December, 2004) that instituted public-private partnerships and in which one of the criteria for selecting private companies for the partnership is lower HDIs. Currently, there are 13 bills being discussed in Congress that take HDIs as a targeting tool, mostly earmarking federal and state taxes to municipalities according to their position in the ranking ([www.camara.gov.br](http://www.camara.gov.br)). Congress is now discussing the use of HDIs for allocating resources in the federal budget.

The most important initiative taken by Congress, seen by many interviewees as an indirect consequence of HDIs, is a fund – Fund for the Combat and Eradication of Poverty – created by Constitutional Amendment no. 31, enacted in December 2000 and regulated by Complementary Law no. 111, enacted in July 2001. The legal bases of the Fund do not mention that HDIs are to be used as a targeting tool for the objectives of the Fund, which is “to give all Brazilians access to dignified levels of subsistence”. Resources are for nutrition, housing, education, health, income transfer and other relevant programmes to improve living conditions. The Fund expires in 2010. The most striking feature of the Fund is that it earmarked a percentage of several federal taxes at the height of fiscal control and of budgetary surpluses. In 2004 the Fund invested nearly R\$ 4 billion (approximately US \$1.6 billion), according to the government.<sup>23</sup> The Fund is the main source of resources for programmes of poverty alleviation and income transfers through *Fome Zero*.

### **3.5.3 Influences on states’ policies**

Soon after the creation of the federal Fund for the Combat and Eradication of Poverty, six Brazilian states created their own state funds with the same purpose of earmarking a percentage of the states’ main tax. Five of these states are in the Northeast and some use HDI-Ms as a targeting tool.<sup>24</sup>

Several states have issued laws and state agencies have elaborated development and governmental plans in which the HDI-Ms are one or the main criteria for resource allocation. Table 6 summarizes the influence of HDIs on state actions.

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<sup>23</sup> More information and data about the Fund are available at the following sites: [www.mds.gov.br/estatisticas/analise\\_comparativa](http://www.mds.gov.br/estatisticas/analise_comparativa) and [www.fomezero.gov.br](http://www.fomezero.gov.br).

<sup>24</sup> Not all states provide access to their legislation on the Internet.

**Table 6 - HDI's influence on legislation and on social programmes of selected states**

State	Legislation/Programme	Description
Amazonas	State Council on Human Development Law 2784 of 2003 Law 2798 of 2003  Citizenship Programme	Integrated by representatives of state agencies and of civil society to coordinate social policies Creation of the Fund for Human Development Creation of a minimum wage to "contribute to the increase of the state's HDI" To "contribute to the increase of the state's HDI".
Bahia	4-year Plan	One of the objectives of the 2004-2007 development plan is to increase the state's HDI
Ceará	Economic Development Plan	To further improve the state's position in the ranking, which has moved from 23 <sup>rd</sup> in 1991 to 19 <sup>th</sup> in 2000  To increase the state's HDI from 0.547 to 0.65.
Maranhão	Government Plan, 2003-2006	The stated goal of the current government is to increase the state's HDI from 0.776 to 0.800.
Minas Gerais		These two programmes target municipalities with lower HDIs.
Paraná	Electricity and Milk Distribution to Needy Children	Social projects and microcredit for the rural population
Pernambuco	Rebirth Project	Distributed to municipalities with less than 15,000 inhabitants and with lower HDIs.
Rio Grande do Sul	School Uniforms	Loans to be granted to municipalities with HDI equal or lower than 90% of the state's average.
Santa Catarina	Fund for small-size companies	To integrate federal, state, municipal and private projects in the 50 municipalities with lower HDIs.
São Paulo	Social Network	In Tocantins, the federal programme <i>Fome Zero</i> targets the 42 municipalities with lower HDIs.
Tocantins		

Source: Information extracted from a preliminary version of a survey by UNDP Brazil.

The information above shows that: (a) both economically well-off and poor states have incorporated HD principles and indexes in their programmes and plans; (b) in some states and in certain programmes, HDIs are used as a targeting tool and in others as a governing principle; (c) when HDIs are used as a targeting tool, state policy makers have used them in a variety of ways, showing their capacity to innovate and to make use of the indexes in a wide range of policies.

The influence of HDIs on the states can be also found in other areas: (a) in several states HDIs are used for targeting municipalities in their annual budgetary law; (b) low HDI is one of the criteria for distributing a share of state tax to the municipalities, as it happened in Minas Gerais with the 'Robin Hood Law' mentioned above; (c) states with professional statistical agencies have produced their own social and economic development indexes, for example, São Paulo, Bahia, Rio Grande do Sul, Paraná and Minas Gerais, among others; (d) several states have created other types of indexes, such as for environment and human rights;

the proliferation of state indexes, although very ambitious in some cases, as argued by one interviewee, encourages the states to improve their information and policy capacities; and (e) one interviewee mentioned that in certain states with higher HDIs, the government uses the state's position in the ranking as a way to attract private investment.

### 3.5.4 Intellectual influences

The influence of HDPs in Brazil is assessed here through the use of three indicators.<sup>25</sup> The first is the number of academic and technical publications written in Portuguese in which HDIs are taken either as a research variable or for assessing the social conditions of specific territories. Using the search tool Google Scholar (<http://scholar.google.com>) for the search “*Índice de Desenvolvimento Humano*” (Human Development Index in Portuguese), 786 hits were found in Portuguese. When the word *Brasil* was added, “*Human Development Index*” + *Brazil* (all in Portuguese), the number of hits was reduced to 737. This means that 737 articles and papers written by academics and professionals are available or are cited on the World Wide Web. Although articles found may not necessarily have been published in Brazil or by Brazilians, the language restriction of the search certainly reduces the number of hits. For example the same search done in English (“Human Development Index” + Brazil) produced 1,510 hits.

The second indicator surveys the use of HD principles and of HDIs in 31 listed academic journals on Social and Human Sciences to show HDP's influence on the academic research agenda. The published articles can be accessed at [www.scielo.br](http://www.scielo.br). There are currently seven published articles in Brazil's best academic journals discussing or taking HDIs as a variable and one article dialoguing with Amartya Sen's principles regarding inequality and poverty.

The third indicator is evaluating the influence on educational curricula. We tackled this item by reviewing two sets of national examination applied by the Ministry of Education. The first is the National Exam for Secondary Education. Since 1998, Brazil has been conducting a non-mandatory annual measurement of student performance on finishing secondary school. Three out of seven exams had questions that mentioned HDI and in 2000 the index appeared in two questions, signaling that HDIs and HD principles are considered part of the secondary school syllabus. The 2004 test was taken by 1,552,316 students in 608 municipalities (see [www.inep.gov.br/basica/enem](http://www.inep.gov.br/basica/enem)). A government programme, *ProUni*, for university scholarships, uses the exam as one of its selection criteria. Furthermore, some 400 institutions of higher education use the test in some form during their selection processes.

The other exam investigated was the National Exam of Courses, which is taken by final year university students with the aim of evaluating undergraduate courses. It has been taken by students since 1996 and in 2003 the exam was taken by over 470,000 students on 26 fields. Of the 26 fields we chose the four subjects with the most relevance to planning and

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<sup>25</sup> The Terms of Reference suggest the use of HD principles in educational curricula as one of the instruments for measuring the influence of HD principles on the intellectual debate. However, this information is impossible to access because colleges and universities in Brazil do not post course syllabuses on the Internet, unless for their registered students.

public policy – Administration, Economics, Geography and Journalism. None of these tests, however, mentioned HDIs or HD principles.

### **3.5.5 Influences on raising entrepreneurial awareness**

Several surveys have shown that Brazilian elites, including those from the business community, play a very small role in addressing the country's social dilemmas, although they do recognize the magnitude of Brazil's poverty and inequality and place access and the improvement in education as the first national goal. Rather, Brazil's elites see these problems as the sole responsibility of governments. A survey of the elite perceptions of their role comparing Brazilian elites with their counterparts in South Africa and Bangladesh show that in Brazil and in South Africa, the elites fail to see the solutions to these problems as also a matter of personal responsibility, which is different from the elite perception in Bangladesh.<sup>26</sup> This confirms a national view that Brazilian entrepreneurs have little or no involvement in social projects in general. However, one NGO, the Ayrton Senna Foundation, named after the late Brazilian Formula 1 champion, has been working in close partnership with UNDP to attract the attention of entrepreneurs to HD principles.

The head of the Ayrton Senna Foundation became aware of HDIs and of the role of education in fighting poverty by reading Amartya Sen's book, which influenced the objectives of the NGO, especially the view that education is the best way to increase people's choices. The NGO's goal is to approximate Brazil's HDI position in the world ranking (72<sup>nd</sup>) to the country's GDP position, currently in the 15<sup>th</sup> place. The NGO claims to have involved the 80 biggest companies with headquarters in Brazil – both national and foreign – representing one third of Brazil's GDP. The head of the NGO shares the view that Brazilian entrepreneurs are shortsighted and self-centred, but, she argued, the good reputation of the NGO has made them contribute financially.

The work of the NGO is to finance teacher training and to improve school facilities. It has reached over 5 million children, mainly in the state of Pernambuco in the Northeast. It acts through another 30 NGOs because, according to the head, the government is inefficient. The NGO also helps raise awareness by publishing and distributing leaflets about the NGO's work and about the quest to improve HDIs to passengers of one of Brazil's airlines. Furthermore, the NGO awards what is now considered to be the most important prize for published articles by journalists about HDPs.

Summing up, HDPs have helped raise politicians', policy makers' and entrepreneurs' awareness on the need to improve health care and education indicators and to increase income transfer mechanisms. Despite fiscal constraints at all levels of government and of policies of tight fiscal control introduced since the mid1990s, two social policies and several income transfer mechanisms have received political and financial support. As shown above, many enabling conditions have contributed to the changes introduced in the 1990s. The broad dissemination of HDPs is one of the favourable conditions that have helped to place education, health care and income transfer issues on the country's agenda but most importantly, HDPs have also played a role in changing policy priorities.

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<sup>26</sup> See Reis (2000). A Portuguese version of this survey is available at [www.scielo.br](http://www.scielo.br).

## 4. Lessons learned and ongoing challenges

The lessons of Brazil's experience of raising awareness on HD principles and of the use of HDIs as a targeting tool may be applicable in other countries, in particular its general lesson: well-meaning efforts to disseminate HD principles can influence policy changes and increase resources for HD, even in countries bound by fiscal and financial constraints. Although the political, social, economic and intellectual conditions of countries – the demand side conditions – vary greatly, innovation, partnerships and the credibility of the leading institution – the supply side conditions – might overcome constraints and play a crucial role in policy making even in countries where the enabling conditions are not as favourable as those found in Brazil.

A success story, however, does not preclude challenges and tradeoffs. Some are particular to the Brazilian experience and some can be generalized. However, they require debate within UNDP rather than recommendations from the members of this Assessment. These challenges and tradeoffs include:

1. The introduction of new indicators into HDIs has been a matter of controversy among interviewees. Broadening the indexes (mainly to include housing and sanitation but also environment, violence and unemployment) has been advocated by many because the small number of indexes limits, they argue, the adoption of public policies targeting the most vulnerable territories and social groups.<sup>27</sup> On the other hand, many interviewees are against broadening the indicators on the grounds that they are attractive because (a) they are simple; (b) they allow for inter-temporal and international comparison; and (b) each index added would cost much more money.
2. Many interviewees argued that the success of the indexes obscures an understanding of HD principles and that other dimensions of poverty and inequality are overlooked because politicians and policy makers focus only on HDIs. However, there was no consensus among interviewees on this issue.
3. Because of the great success of HDPs coupled with the credibility of the UNDP, there has been a tendency to create high and unrealistic expectations of their potential. The following examples have been extracted from the interviews: (a) the UNDP should advocate the adoption of a mandatory budgeting, associating solutions to poverty alleviation to a mandatory budgeting;<sup>28</sup> and (b) HDIs should allow for short-term changes. These examples show some unintended consequences of this success. In this case, a success story has led to expectations beyond the scope of HDPs and of UNDP.
4. It was argued by some interviewees that social movements and NGOs have little influence on public policies in general and on HDPs in particular.

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<sup>27</sup> It should be noticed that the interviewees' examples about which indexes should be included are generally related to their field of work.

<sup>28</sup> In Brazil, executives are not legally required to spend legislatively-approved funds allocated in the budget.

5. The problems related to the production of the 2004 Racial Atlas described above signal that the production of HDPs might focus again on assuring quality and ease of access to data, both pointed out as crucial reasons for the success of HDPs.
6. All interviewees felt that the custodian role of UNDP in HDPs should not be replaced by any other organization, thus contradicting the view among some stakeholders outside Brazil that UNDP's role should diminish as a means of putting HD on the policy agenda. Given the fierceness of party and electoral competition in Brazil, a UN organization is seen as an honest broker for HDPs, thus overcoming the constraints of electoral cycles and the misunderstandings brought to the fore when national, state and municipal indexes fall in comparative terms.
7. Except for the 1996 national report, HDPs are not generally subject to peer review. However, as the indexes are generally produced by governmental and academic organizations with high levels of credibility, they do not necessarily require peer reviews, which are more appropriate for thematic reports.

Two points deserve special consideration. The first is the tradeoffs of the decision taken by UNDP of not having a permanent team within UNDP for HDPs. The fieldwork and the interviews have revealed that not having a permanent team led to the building of important partnerships for the production of HDPs. On the other hand, the lack of a permanent team and the centralization of decisions delay the decision making process, overload those in charge of HDPs, and prevent UNDP from establishing follow-up mechanisms, including information about the costs of HDPs.

The second point brings to the fore the debate about whether HDPs should be policy-oriented, meaning more analytical and more focused on policy recommendations. This is a tricky issue in a country with high levels of disparities, in which mechanisms for addressing social dilemmas are seldom consensual, and in which officials have demonstrated their capacity to introduce innovative policies addressing HD-related issues. Furthermore, the existence of intellectual capacity for policy design in the federal and in several state administrations signals that governments have the expertise to formulate policies. However, there was a consensus among those interviewed about the need for the UNDP to follow up and to evaluate HDPs between reports. In view of the intransigence of poverty and inequality indicators in Brazil, UNDP might also want to consider joining efforts with other public and non-governmental organizations, as well as with academics, to discuss the basic reasons why economic growth has not produced better HD results. This means that UNDP might consider devoting an analytical HDR to this question, inviting various parties to contribute.

## 5. Concluding remarks

Data and analyses provided in this report have shown that HDPs have played an important role in promoting HD approaches in Brazil and that the successful dissemination of HDPs has created several incentives for politicians, policy makers, journalists, academics, NGOs, entrepreneurs and advocacy groups to accept, adopt, and discuss HD principles.

Many enabling conditions have contributed to this success story. On the demand side, the country's political, social, intellectual and economic conditions have enabled the broad acceptance of HD principles and the visibility of HDPs. On the supply side, innovation, strategic partnerships and UNDP leadership have also contributed to the success of HDPs. Of particular importance as regards innovation are the disaggregating of the indexes at the municipal level, the Atlas format, and the easy access to the data.

However, the main impact of HDPs in Brazil lies in policy making. This is because HDIs are constantly used as a targeting tool for social programmes. This is a major contribution in a country of continental dimensions, cut across by intra- and inter-regional differences and in which party politics and the demands of the electoral cycle were, until the advent of municipal indexes, the only variables for targeting territories and individuals.

This report has also shown that if changes are to be introduced in the production and dissemination of HDPs, they should be gradual and incremental, given the high acceptance of HDPs in Brazil. Put in soccer terms familiar to Brazilians, there is no need to change a winning team and a winning coach. This does not imply that there is no room (and need) for establishing follow up mechanisms, particularly between reports, for improving actions already in place, such as capacity building, and for a constant awareness of the importance of keeping high standards in HDPs.

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## **Annex I - List of interviewees**

**EP:** elected politician

**PM:** policy-maker

**CS:** civil society

**AC:** academia

**MD:** media

### **BRASÍLIA**

1. Luiz Alberto (member of the House of Representative) (EP)
2. Senator Christovam Buarque (former governor of the Federal District) (EP/AC)
3. Lísicio Camargo (Finance Ministry) (PM)
4. Yeda Crucius (member of the House of Representative) (EP)
5. José Carlos Ferreira (ILO)
6. Senator Heráclito Fortes (EP)
7. Maria das Graças Paiva (HDI of Recife) (PM)
8. Ricardo Henriques (Ministry of Education) (PM)
9. Senator Tasso Jereissati (former governor of Ceará) (EP)
10. José Carlos Libânio (UNDP)
11. Paulo Lustosa (IBRADE/NGO) (CS)
12. Senator Antônio Carlos Magalhães (former governor of Bahia) (EP)
13. Antônio Magalhães (World Bank)
14. Carlos Mussi (ECLAC)
15. Inácio Muzzi (CDN/Fleishman-Hillard) (MD)
16. Rômulo Paes de Sousa (Ministry for Social Development) (PM)
17. Ariel Garces Pares (Ministry of Planning and Budgeting) (PM)
18. Ana Peliano (Director, IPEA) (PM)
19. Matilde Ribeiro (Minister for Racial Equality Policies) (PM)
20. Rodrigo Rollemberg (Ministry of Science & Technology) (PM)
21. Veet Vivarta (ANDI/NGO) (CS)

### **SÃO PAULO**

22. Fernando Henrique Cardoso (former President of Brasil) (EP/AC)
23. Viviane Senna (Institute Ayrton Senna/NGO) (SC)
24. José Roberto Toledo (Terra internet news) (MD)
25. Haroldo Torres (Researcher – CEBRAP/SEADE) (AC)

### **BELO HORIZONTE**

26. Maria Beatriz Gonçalves (Director, Institute for Sustainable Human Development) and other faculty members (AC)
27. Maria Luiza Marques (Director, João Pinheiro Foundation) (PM)
28. Roberto Martins (former president of IPEA and of the João Pinheiro Foundation) (PM)

29. Eduardo Rios Neto (Researcher, CEDEPLAR) and other members (AC)

**RIO DE JANEIRO**

30. Candido Grzybowski (Researcher, IBASE) (CS)

31. César Maia (Mayor of Rio de Janeiro) (EP)

32. Marcelo Néri (Researcher, Getulio Vargas Foundation) (AC)

33. Flávia Oliveira (Globo newspaper) (MD)

34. Marcelo Paixão (Researcher, UFRJ) (AC/CS)

35. João Paulo Reis Veloso (former Planning Minister) (CS)

## Annex II - Brazil's Reports and Atlases

Year	Title	Main topics
1996	Brazil's Human Development Report	HDI (country and states) Socioeconomic and regional disparities
1998(1)	Human Development and Living Conditions: Brazilian Indicators (book) and Human Development Atlas (CD-Rom)	Analyses comparing the 1998 and the 1996 results and comparing Brazil's indicators with other countries HDIs (country, states and municipalities)
2003	Human Development Atlas	135 socioeconomic indicators Education Income Inequality Racial Inequalities
2003(2)	HD, Decent Work, and the Future of Small-Scale Production Entrepreneurs in Brazil	Strategies for increasing the role of small-scale production entrepreneurs and policy recommendations
2004	Racial Atlas	Racial and gender inequalities

Notes: (1) All reports are written in Portuguese, with the exception of the 1998 Atlas CD-Rom, which has an English version. (2) Report commissioned to Ignacy Sachs. It is more a policy document than a NHDR, hence not reviewed here.

### **Annex III – Sites visited**

[www.camara.gov.br](http://www.camara.gov.br)  
[www.datasus.gov.br](http://www.datasus.gov.br)  
[www.edudatabrasil.inep.gov.br](http://www.edudatabrasil.inep.gov.br)  
[www.fomezero.gov.br](http://www.fomezero.gov.br)  
[www.google.com.br](http://www.google.com.br)  
[www.inep.gov.br/basica/enem](http://www.inep.gov.br/basica/enem)  
[www.ipea.gov.br](http://www.ipea.gov.br)  
[www.mds.gov.br](http://www.mds.gov.br)  
[www.mds.gov.br/estatisticas/analise\\_comparativa](http://www.mds.gov.br/estatisticas/analise_comparativa)  
[www.mec.gov.br](http://www.mec.gov.br)  
[www.mme.gov.br](http://www.mme.gov.br)  
[www.planejamento.gov.br](http://www.planejamento.gov.br)  
[www.presidencia.gov.br/projetoalvorada/alvorada.htm](http://www.presidencia.gov.br/projetoalvorada/alvorada.htm)  
[www.rio.rj.gov.br](http://www.rio.rj.gov.br)  
<http://scholar.google.com/>  
[www.scielo.br](http://www.scielo.br)  
[www.undp.org](http://www.undp.org)  
[www.undp.org.br](http://www.undp.org.br)  
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