

## **Five years down the road:**

### **The ILO's campaign on the extension of social security**

*Social security department  
September 2008*

#### **1. Introduction**

The International Labour Conference (ILC) at its 89<sup>th</sup> Session in June 2001 concluded a general discussion on social security with a renewed commitment of the International Labour Organization to the extension of social security coverage and the improvement of the governance, financing and administration of social security.<sup>1</sup> ...On 18 June 2003 in Geneva the Director-General and representatives of governments, workers' and employers' organizations launched the "Global Campaign on Social Security and Coverage for All". The mandate of the campaign was defined in the "Resolution and Conclusions concerning social security ..." of the ILC 2001 as "...to promote the extension of coverage of social security"<sup>2</sup>. Within the same document it is recommended that "...each country should determine a national strategy for working towards social security for all"<sup>3</sup>...This report provides an updates on the development of activities under the campaign since 2003.

#### **2. Campaign strategy and action**

The campaign adopted a deliberate interacting four-tiered strategy that encompasses and integrates all activities of the Social Security Department. This strategy has been developed as a response to the needs expressed by ILO constituents and within the dynamics of the new development policy debate where social security has gained a reinforced position.

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<sup>1</sup> see ILO, 2001: *Resolution and Conclusions concerning social security*, International Labour Conference, 89th Session, 2001 (Geneva), paras. 17-19.

<sup>2</sup> Ibid. para. 17.

<sup>3</sup> Ibid. para. 16.

## **2.1. The first tier: Generation, management and dissemination of knowledge**

The prerequisite for all policy development, technical advice and capacity building is the generation and ability to share knowledge. This dimension of the strategy encompasses collection and analysis of statistical information, the exchange of national and international experience through research and internet based knowledge sharing as well as the development of new technical tools that support the formulation of national policies.

- *The Social Security Inquiry (SSI)*

In order to be able to monitor progress with respect to the objective of extending social security coverage, the capacity of the ILO and its constituents to measure existing coverage, as well as gaps in population and benefit coverage through the collection of statistical information, is essential. As the provision of social security always requires substantial national resources it is equally important to have information on social security expenditure and its sources and patterns of financing. Outside European Union and OECD countries neither an internationally accepted statistical standard measuring coverage and resource utilization nor a database of internationally comparable data exist. The new *ILO Social Security Inquiry* sets out to develop such an internationally accepted statistical standard and to assist countries in compiling comprehensive statistical data on social security so as to provide reliable benchmarks for national and international policy making. Since 2004 the Social Security Inquiry and its associated online database have been refined and expanded, notably through the development of partnerships with other international organizations (OECD, Asian Development Bank (ADB)) and the International Social Security Association (ISSA). Data are now available for more than 80 countries for at least some of the national schemes. The ILO Social Security Database will shortly be universally accessible through Internet and provides a tool to collect, store and disseminate statistics and core indicators on social security.

- *Knowledge and learning platforms*

The social security department is developing an internet based knowledge management platform on the extension of social security (Global Extension of Social Security (GESS)). It is a crucial instrument of the Global Campaign as it links the department to its clients and constituents in a new interactive way. It shares information on the work of the office and other organizations, brings problem solving international networks together, and improves the responsiveness of the technical advisory services to ILO constituents through online technical support and distance learning. A first version of the platform was launched in September 2007 at the World Social Security Forum in Moscow. The platform also includes GIMI (Global Information on Micro-Insurance), a component focused on micro insurance, which is already well established in the community of micro-insurance experts around the world. 700 users from 65 countries have registered so far on the GESS & GIMI platforms. The platforms already provide a library with more than 700 resources, a glossary with 520 social security terms, 40

thematic and country pages, a database of 50 CVs of experts, and a database of more than 100 thematic questions and related answers.

Another, linked platform, developed by the STEP Portugal project, is an inter-active web-based learning tool and knowledge management system (CIARIS) which has contributed to the training of more than 1900 people from 30 countries on the extension of social protection and social inclusion. It has contributed to the creation of knowledge in several fields including social assistance, the role of social security for preventing child labour and the integration of social protection in local economic development strategies. CIARIS has so far supported more than 400 people to define and implement strategies for the extension of social security.

- *Technical tools*

The social security department has developed during the last four to five years technical tools that permit the evaluation of policy alternatives or support the good governance and management practices in individual social security schemes or national social security systems. For a number of years the social security department disseminates its actuarial and social budget computer models as well as social protection expenditure and performance review methodology (SPER) without charge to interested constituents aiming at enlarging their practical use. A new flagship product, the Basic Social Protection Tool, is a simulation tool that allows governments and constituents to estimate the cost of basic social security benefits in specific country contexts. In addition, STEP-Africa has developed a management and monitoring software (MAS Gestion and MAS Pilote) in order to reinforce the quality of the management of health micro-insurance schemes.

- *Research activities*

Over the last five years the ILO has issued several research papers on the extension of social security (see Annex I), undertaken major studies and published a number of books on basic elements of a strategy to combat social exclusion<sup>4</sup>. The results of these activities were disseminated, *inter alia*, in the framework of a major international conference on "Social Protection and Inclusion: Converging efforts from a global perspective" in Lisbon, 2-3 October, 2006 jointly organised by the Office, the Ministry of Labour and Social Solidarity of Portugal and the European Commission.

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<sup>4</sup> i.e. ILO/Estivill, J., 2003: Concepts and strategies for combating social exclusion : an overview (Geneva, ILO)" and Publication of the book ILO, 2006: Social protection and inclusion: Experiences and policy issues (Geneva, ILO)

A new ILO position on social health protection was prepared in the framework of an international conference on Social Health Protection in Berlin in October 2005<sup>5</sup>, the Conference on Extending Social Health Insurance to Informal Economy Workers in Manila in October 2006, and a high level conference organised by the French presidency in March 2007<sup>6</sup> and has recently been laid out in the Social Security Policy Briefing series<sup>7</sup>.

A high-level research seminar on the role of social security in state and nation building jointly organised with DFID and GTZ in September 2006 led to a forthcoming publication<sup>8</sup> that makes the case for early investment in social transfers as a component of national development strategies. One of the major contributions of the ILO to the new widely accepted development policy paradigm that countries can “grow with equity” was the work undertaken with regard to the analysis of the affordability of basic social security benefits in developing countries. Based on a number of discussion papers<sup>9</sup> on sub-Saharan Africa, Asia and in Latin America that were widely circulated and have shown that a basic set of social security benefits or at least components thereof are affordable over a medium time frame even for low-income countries - the office consolidated its findings in a publication in the framework of the Social Security Policy Briefing series<sup>10</sup>.

The paper makes a case for a basic social security floor from a rights based as well as from an affordability perspective. Countries can ensure affordability through gradual implementation of social security depending on the state of development of their economy and national commitment.

## 2.2. The second tier: Policy development

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<sup>5</sup> ILO/GTZ/WHO, 2005: The Berlin Recommendations for Action, Final version 3 July 2006. International Conference on Social Health Insurance in Developing Countries, Berlin 5-7 December 2005.

<sup>6</sup> Quote the publication of the 2005 Berlin conference.

<sup>7</sup> ILO, 2008: Social health protection. An ILO strategy towards universal access to health care Social Security Policy Briefings Paper 1 (Geneva)

<sup>8</sup> See ILO: Building decent societies, ...Geneva, forthcoming

<sup>9</sup> Pal, K.; Behrendt, C.; Léger, F.; Cichon, M. and Hagemeyer, K., 2005: *Can low-income countries afford basic social protection? First results of a modelling exercise*. Issues in Social Protection, Discussion Paper 13 (Geneva, ILO); Mizunoya, S.; Behrendt, C.; Pal, K. and Léger, F., 2006: *Costing of basic social protection benefits for selected Asian countries: First results of a modelling exercise*. Issues in Social Protection, Discussion Paper 17 (Geneva, ILO). Gassman, F., Behrendt, C., 2006: Cash benefits in low-income countries: simulating the effects on poverty reduction for Senegal and Tanzania, Issues in Social Protection, Discussion Paper 15 (Geneva, ILO)

<sup>10</sup> ILO, 2008: *Can low-income countries afford basic social security?* Social Security Policy Briefings Paper 3, Geneva

The office developed a new baseline strategy for the campaign. In August 2006 the first version of the policy paper “Social security for all: Investing in social and economic development” was issued as a consultation paper<sup>11</sup> and circulated in 2007 to governments and workers’ and employers’ organizations in a world-wide consultation process that sought to achieve widest possible consensus on the basic policy message. After a thorough review of all comments the final version of the policy paper was prepared in 2008<sup>12</sup>. A key message is that social security benefits are a powerful tool to combat poverty and achieve the Millennium Development Goals. A further message is that the build up of national social security systems early in the economic development process is a key investment in social and economic development.

The pragmatic policy paradigm that is emerging from the policy development work recommends that countries which have not yet achieved universal or widespread coverage, should first aim to put in place a, basic and modest set of social security guarantees, that could be called a social security floor, for all residents in a country. This includes:

- access to basic, essential health care<sup>13</sup>;
- income security for children, facilitating access to nutrition, education and care;
- some social assistance when poor or unemployed (possibly along the ideas explored by the Indian Employment Guarantee scheme ); and
- income security through basic pensions when old or disabled.

The floor is the launching platform for a further social security development process that provides more security when governments’ “fiscal space” increases as economies continue to develop.

There are many ways to achieve that set of basic social security guarantees as a first step of a national social security development strategy. Some countries will seek to extend social insurance and combine it with social assistance, others will subsidize social insurance coverage for the poor to enable them to enjoy insurance coverage, others will seek to establish tax financed universal schemes. Each approach will have its advantages and its problems and each will be *path dependent* on past developments and national values. What matters in the end, is that all people have access to the basic guarantees. It is the outcome of national social security strategies that matters, not the ways and means that help countries to achieve the outcomes. About 30 developing countries are already successfully putting in place elements of minimum social security guarantees through social transfers programmes, e.g. Brazil through the Bolsa Familia programme and Mexico through the Oportunidades programme, or South Africa, Namibia and Nepal

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<sup>11</sup> ILO (2006): Social security for all: Investing in global social and economic development. A consultation. Issues in Social Protection; Discussion Paper 16 (Geneva).

<sup>12</sup> ILO (2008). Social security for all: Investing in global social and economic development. Social Security Policy Briefing; Paper 4 (Geneva)

<sup>13</sup> including health services for maternity protection.

through tax financed basic pension systems.

This policy position was also subjected to a rehearsal in the context of a series of tripartite regional seminars on social security in Latin America, Arab States and Asia, where it was agreed upon by ILO constituents. These meetings were co-hosted by the Ministries of Labour in the host countries and attended by more than 200 participants including representatives of Governments, Workers and Employers, observers from social security and other public institutions and international organizations involved in social security activities. The main objective of the meetings was to share experiences among the participants on how to extend social security coverage, to identify good practices and to foster consensus on how to pursue further extension of social security coverage as a national policy priority. The discussions allowed the ILO to reach a wide consensus on the priorities to be addressed in the coming years by the countries and the ILO in the context of the campaign and Decent Work Country Programmes. A similar meeting in Africa is scheduled for 2009.

ILO studies have also shown that some developing countries could benefit from some interim financial assistance in the short-to-medium term to finance the setting up basic social security schemes for their populations and to pilot-test specific sets of benefits<sup>14</sup>. The ILO is presently testing the concept of a Global Social Trust Initiative<sup>15</sup> as one vehicle for the financing of such initiatives. The office has reported on the progress of the initiative in the ESP in November 2007<sup>16</sup>.

The idea of investing in basic social security benefits at an early stage of economic development as a key instrument to achieve the MDGs and a tangible social dimension of globalisation has been taken up and is promoted by other UN agencies (including UNDESA, UNICEF) in coalition with donor agencies (GTZ; DfID) and key NGOs.

## **2.3 The third tier: technical co-operation**

At any given point in time the ILO is providing concrete technical advice or undertaking longer term technical co-operation projects that have a direct bearing on the extension of social security coverage in about 30 countries on all continents. ANNEX II provides a list of more than 30 major technical co-operation reports that were submitted to constituents and donors since 2004. Some typical activities are briefly described in the following paragraphs:

### **AFRICA**

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<sup>14</sup> Pal et al (2005); Mizunoya et al (2006); Gassman and Behrendt (2006); ILO, (2008, Social Security Policy briefings No.3).

<sup>15</sup> For more detailed information on the GST pilot refer to GB301/ESP/3 providing a progress evaluation of the Global Social Trust pilot project.

<sup>16</sup> Ibid.

- One of the highlights in ongoing technical co-operation is the DFID funded project "ILO Global Campaign for Social Protection and Coverage for All as a means to reducing Poverty in Africa " with a focus on Tanzania and Zambia. The aim of the project is to identify the amount of fiscal space needed to implement a minimum social security benefit package. The project first constructs a comprehensive base-line with fifteen year status quo expenditure and revenue projections. Then reform analyses which will involve an intensive dialogue with the constituents, and other involved ministries, UNCT and donors will be undertaken. The results so far confirm earlier research findings that the introduction of a universal old-age pension seems to be within the range of affordability.
- In Ghana technical support is rendered on a regular basis to the development of the universal health insurance. In South Africa and Lesotho the Office has entered into a longer-term dialogue on the future of social security in the context of the DWCP. In Zimbabwe the ILO supported national plans to improve maternity protection and the implementation of the National Health Insurance Scheme.
- In Francophone Africa the STEP Belgium Programme has been involved in Benin, Burkina Faso, Congo (RDC), Rwanda and Senegal. It supports national strategies for the extension of social security as part of Decent Work Programmes. It also assists countries in the implementation of innovative approaches, such as health mutual organizations for professional groups linked with formal social security institutions with the aim to progressively tend towards universal coverage, and health insurance schemes linked to micro-finance. At a sub-regional level, STEP supported the development of blueprint legislation on health mutual organizations for the West African Economic and Monetary Union (UEMOA). In Senegal STEP contributes to the development of the National Social Protection Strategy through the implementation of pilot programs (e.g. social protection systems for workers of the agriculture and transport sectors). In Burkina Faso, Benin and Rwanda the program advises on the development of a national strategy of social protection including inter alia the extension of health insurance coverage through the implementation of pilot programmes which rely on national and international solidarity. .
- In Lusophone Africa the STEP Portugal programme has supported the scaling up of the national Social Pensions programme in Cap Verde through strengthening operational procedures, upgrading of the information system and improvements of the benefit package for social pensioners. In Mozambique the efforts to extend Social Protection to the most excluded and towards the progressive establishment of a minimum social security floor will be supported through a social budgeting exercise. The project also strengthens (in partnership with DFID, the Netherlands and UNICEF) government capacity to manage, deliver, monitor and upscale the Food Subsidy Program and participates in the UN efforts to assist the Government of Mozambique in responding to the fall-out of the global food price crisis.

## AMERICAS

- In Uruguay ILO supported a technical study on the family allowances scheme, which contributed to the discussion of a comprehensive reform that was approved by Congress in December 2007. In Peru a series of activities were undertaken over the last five years to help the government reform social security in the context of a social dialogue process, such as a financial and actuarial study of EsSalud (Peruvian social health insurance administration) and further technical studies and the support for drafting a law on the “Universalization of Social Security in Peru”. In Ecuador, technical and actuarial assistance was provided to the Government to design a social security system reform. The support included assistance to quantify the creation of a “Pensión Básica Universal” aimed to protect to the whole population over 65 years of age. In Colombia, the STEP Belgium programme supports the development of the national subsidized health insurance scheme for the poor. In Trinidad and Tobago, the ILO has supported the development of policy measures and options for the proposed extension of social security to the self-employed. The proposal covers legislation (based on scheme regulations and existing labour law), administration and financial advice related to the extension.
- In Chile the ILO working with workers, employers and government, has contributed over a number of years to a comprehensive reform of the pension scheme. The ILO contributed proposals for expanding coverage, improving benefits and increasing gender equity. The ILO provided a series of reports to a number of consultative seminars and national and international hearings that informed the national decision making process. Technical cooperation with the Budget Office through a project providing an actuarial model assisted the government in evaluating the financial status of the existing system and exploring reform options. In 2006 the office contributed to the national reform commission (i.e. “the Marcel Commission”) proposals on the expansion of contributory components, the introduction and expansion of non-contributory components and the introduction of solidarity mechanisms in financing and coverage. When the draft pension reform law went to congress in December 2006, the ILO participated in parliamentary and Senate hearings. The law was approved in congress in January 2008.

## ASIA

- In **India**, the ILO has worked with the Government in developing proposals for extending meaningful old age and health coverage to workers in the informal economy (“unorganised sector”). Assuming these proposals come to fruition, along with the ground-breaking National Rural Employment Guarantee Scheme, upto 300 million additional people could be covered. The office also supports the development of the innovative Karnataka “Yeshasvini” health insurance scheme for rural farmers, that reaches out to 3 million farmers.
- In **Nepal** the ILO has provided support to review long-standing issues with respect to labour and social security law, and to prepare policy discussions in



advance of the reconstitution of the government. Furthermore, at the request of UNICEF the ILO provided a financial analysis to support proposals for the introduction of a basic social security benefit package which, in the post-conflict environment, would represent a significant “peace dividend”. Within the context of the labour market reform, the ILO provides assistance for the establishment of an unemployment insurance scheme. In Sri Lanka the ILO supported the Social Security Systems to cope with the fall out of the Tsunami and is now conducting a complete review of the existing social security system with a view to strengthen its universal coverage.

- In Thailand, the ILO has been working for more than two decades on the improvements and extension of social security for private-sector workers. Many ILO Recommendations lead to improvements in population and benefit coverage. The office recently contributed technical advice and capacity building to national debates on the extension of pensions benefits to non-covered population through policy studies and to strengthening the financial sustainability of the Universal Health Care Scheme. In Cambodia, the ILO was instrumental in the establishment of the first social security scheme for private-sector workers that is planned to start by the end of 2008. In Lao PDR, an ILO project has contributed to the introduction and the extension of the Social Security Scheme for private workers and the reform of the civil service scheme as well as the establishment of a national masterplan on social security extension. In Viet Nam, ILO activities have resulted in the establishment of the first-ever social security law in 2006.
- In China, the ILO has provided a complete review of the existing social security system<sup>17</sup>, a comprehensive policy study on extending old-age insurance coverage in the years 2005-2006 and is supporting the actuarial section of the Ministry of Labour through a longer-term technical dialogue. The ILO also traditionally supports the actuarial work in Malaysia. The ILO supported Indonesia in advancing universal social security coverage through technical cooperation projects and within the framework of DWCP, the ILO stressed the need for developing a road map for the implementation of the milestone National Social Security System Act and supported new health insurance and conditional cash transfer initiatives.

In the Pacific region, the ILO has implemented a major Sub-regional Initiative on Social Security for Pacific Island Countries from 2004 to 2006 including social security needs assessment surveys in Fiji, Indonesia, Kiribati, the Philippines, Samoa, Solomon Islands, Thailand, and Vanuatu. The output of the project has been summarised in comprehensive five-volume source books for actions on extending social security.

## ARAB STATES

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<sup>17</sup> see ILO, 2008: **Perspectives on the social security system of China. ESS Paper 25** (Geneva)

- In Bahrain the ILO has contributed to the setting-up of an unemployment insurance scheme through the preparation of the policy outline, the actuarial assessment of the proposed scheme and the drafting of the Unemployment Insurance Law, adopted in 2006. In Jordan, the ILO is providing legal and actuarial technical support to the Government for the extension of coverage under the pension scheme, for the establishment of a maternity benefit scheme and for the ratification of C. 102<sup>18</sup>. A project for the extension of social security coverage in Syria is under development.

## EUROPE

- Unlike other regions, the major issue in coverage extension in Central and Eastern Europe is closely related to non-compliance with laws and regulations. The ILO conducted a major study on the collection of pension contributions and provided policy advice to the participating countries. It also provided pension advisory services aimed at extending coverage in the Stability Pact countries of South East Europe and developed a training manual on gender aspects of pension reform. A regional analysis with respect to the adequacy of pension coverage for women and policy recommendations for addressing gender inequalities in pension provision is underway. Policy advice on pension reform aimed at ensuring a minimum floor of pension coverage for all workers and to avoid loss of coverage of women was provided through tripartite discussions in Armenia and Kyrgyzstan. An analysis on the conformity of Russian social security legislations with Convention 102 is underway.

In some of the countries and regions where the ILO is providing technical co-operation national campaigns for the extension of social security were formally launched. Formal launches were staged in 2003, in Addis Ababa, for the African region, in 2004 in Nepal, Senegal, Mozambique and Kenya, in 2005 in Jordan and in 2007 in Tanzania and Zambia in the context of the above DFID project. In all countries the ILO undertook follow-up activities that were determined by national preferences. In all countries – except for Kenya – activities are still ongoing. Since national social security development plans that involve ILO activities will increasingly become part of national Decent Work Country programmes stand-alone national campaign launches will become less prominent in future.

## 2.4 The fourth tier: capacity building

One necessary condition for the successful planning, implementation and management of social security policies is the availability of sufficiently trained experts that are able to plan, organize, finance and administer benefit schemes.

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<sup>18</sup> Social Security (Minimum Standards) Convention, 1952 (No. 102).

The ILO, over consecutive Programme and Budgets, has invested substantially in this area by compiling the knowledge base and developing training activities, thereby laying the ground for a large-scale initiative to improve the quantitative training of managers and planners in developing countries. So far, the ILO knowledge base has been summarized in five advanced textbooks. Since 2001, the ILO Social Security Department in collaboration with the University of Maastricht conducts a master degree programme in Social Security Financing and Policy Design. As of 2005, a social security track within a master degree programme for actuaries was established at the University of Lausanne. So far, about 100 experts have been trained that are now applying their acquired skills in their countries.

However, the training intensity had to be scaled up considerably to achieve results in the medium term. In 2007 the ILO thus launched its first regional quantitative training programme for Latin America (QUATRIN AMERICA)<sup>19</sup>. Financed by the new RBFA facility the sister programme QUATRIN AFRICA was launched in June 2008. The basic objective of these programmes is to create or improve capacities for national financial planning and financial management of social security systems. Target groups for the training activities are political decision-makers, members of the administrative and supervisory boards of social security systems, managers of social security systems and budget and financial experts in leading ministries. .

Tailor made as well as routine training activities were supporting government policies to extend social security in a number of countries. The participation of social security experts from Government agencies and workers and employer organisations in many seminars and workshops of the Turin Centre also provides for a substantial dissemination of skills in member countries and among constituents.

## **2.5 Summary of experience and lessons learnt**

After five years of campaigning the experience can be summed up as follows:

- (1) The campaign mandate to extend social security to all has provided a useful focus and catalyst that helped to achieve greater conceptual coherence to the work of the office in the area of social security and strengthened the role and visibility of social security in the ILO Decent Work Agenda.
- (2) Campaign research and policy development activities have successfully helped to put the importance of social security coverage on the agenda of international development policy. The objective of extending social security to all is now supported by the UN<sup>20</sup>, the EU<sup>21</sup>, many national

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<sup>19</sup> The programme started in November 2007 in Chile with a training course on actuarial and financial techniques, with the participation of a select group of government staff.

<sup>20</sup> United Nations, Economic and Social Council (E/2006)/L.8, para.19

developments agencies and the G8<sup>22</sup>. The dialogue with social partner organisations and partnerships with other UN agencies and major NGOs are more vibrant than ever.

- (3) The volume, resources and the conceptual coherence of technical co-operation activities in social security has increased considerably. Country activities are increasingly turning into longer-term programmes based on sustained national dialogues with social partners and stakeholders rather than ad hoc short-term inputs. Social security is the most prominent addressee of the newly created RBSA funds.
- (4) National campaign activities have also shown that successful national support depends on two crucial prerequisites: longer run national commitment and the political will to invest in the extension of social security by putting in place relevant legislation and allocating necessary resources as well as the sustained capacity of the ILO to support the process. Given the capacity constraints of the ILO this will have to lead to a greater focus of increasing external resources on a smaller number of “trail-blazer” countries.
- (5) The relatively large investments over the last half decade in training and capacity building is beginning to pay off in terms of improved management and governance but also a wider awareness of ILO values and social security principles in national administrations.

One of the main conceptual problems of the campaign was that the potential of the two classical avenues to extend social security, the formal sector focused social insurance schemes and the community based insurance schemes, is limited when trying to reach out to socially excluded populations largely in the informal economy. The extension of these insurance approaches to as many people as possible is an integrated part of the campaign. However, the fulfilment of the campaign’s mandate to extend social security to all that has just been renewed by the new declaration on Social Justice for a fair Globalisation<sup>23</sup> which demanded also the development of additional policy instruments.

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<sup>21</sup> Commission of the European Communities, 2006: Investing in people. Communication on the thematic programme for human and social development and the financial perspectives for 2007-2013. Communication from the Commission to the Council and the European Parliament (Brussels)

<sup>22</sup> Growth and responsibility in the World economy, Summit Declaration (7 June 2007) from the G8 Summit in Heiligendamm in 2007 which stated the following: “*We recognize that in conjunction with economic growth and active labour market policies, social security is an instrument for sustainable social and economic development*”.

<sup>23</sup> ILO, 2008: Declaration on social justice for a fair globalization, International Labour Conference, 97<sup>th</sup> Session (Geneva)

These policies had to embrace the emerging international experience of conditional and unconditional cash transfers and universal tax-financed benefits. A credible strategy to universalise social security realistically needs first to focus on modest benefits for all and then promote higher levels of security as economies develop further and fiscal space for social transfers widens. However, the legitimacy of the ILO's action rests on ILO standards that give effect to its general constitutional mandate. One of the central questions of the campaign thus remains whether the focus on fast extension of some basic levels of security to all is sufficiently backed by existing ILO mechanisms. The is presently analysing the legal base for the emerging policy paradigm of the campaign. Separate consultations with social security experts and ILO constituents are undertaken in the process.

## **Annex 1: Recent research and policy documents with relevance to the campaign (2005-June 2008)**

Can low-income countries afford basic social security? Social Security Policy Briefings, Paper 3  
(Geneva, International Labour Office, 2008)

Integrating local economic development and social protection. Experiences from South Africa  
Lund, F. (Geneva, International Labour Office; STEP; LED, 2008)

**La reforma previsional en Chile y la contribución de la OIT** (Santiago, ILO, 2008)

Local development and social protection in Europe  
Estivill, J. (Geneva, International Labour Office; STEP; LED, 2008)

Local development, social protection and inclusion. Typology of selected initiatives in Brazil  
Pochman (Geneva, International Labour Office; STEP, 2008)

Mutualidades de saúde em África. Características e criação  
(Genebra, *Bureau* Internacional do Trabalho; STEP, 2008)

Setting social security standards in a global society. An analysis of present state and practice and of future options for global social security standard setting in the International Labour Organization. Social Security Policy Briefings, Paper 2, (Geneva, International Labour Office, 2008)

Social health protection. An ILO strategy towards universal access to health care. Social Security Policy Briefings, Paper 1,  
(Geneva, International Labour Office, 2008)

**Strengthening social protection for ASEAN migrant workers through social security agreements**, (ILO Asian regional programme on governance of labour migration working paper No. 10) Jan 2008

**Asignaciones familiares en Uruguay. Evaluación y propuestas de reforma** (Santiago, ILO, 2007)

Extending social protection in health. Developing countries' experiences, lessons learnt and recommendations , ILO, GTZ, WHO (Eschborn, VAS, 2007)

*Guia de Gestão das mutualidades de saúde em África*  
(Genebra, *Bureau* Internacional do Trabalho; STEP, 2007)

Health microinsurance schemes. Monitoring and evaluation Guide. Volume 1: Methodology, Volume 2: Practical indications  
(Geneva, International Labour Office; STEP, 2007)

**Los trabajadores independientes y la seguridad social**

Coordinadores Fabio M. Bertranou y Pablo Casali (Buenos Aires, Ministerio de Trabajo, Empleo y Seguridad Social, 2007)

**Políticas y programas de protección al desempleo en Argentina.**

Fabio M. Bertranou y Jorge A. Paz (Buenos Aires, ILO, 2007)

**Social Security in Indonesia : Advancing the Development Agenda** (Jakarta, ILO, November 2007)

The right to social security and national development. Lessons from OECD experience for low-income countries. Discussion paper 18

Townsend, P. (Geneva, International Labour Office, 2007)

**World Conference. Social Protection and inclusion. Converging efforts from a global perspective. Lisbon, 2- 3 October 2006. Proceedings**

(Lisbon, International Labour Office; STEP; Ministério do Trabalho e da Solidariedade Social do Portugal; European Commission, 2007)

**Cash benefits in low-income countries. Simulating the effects on poverty reduction for Senegal and Tanzania. Discussion paper 15**

Gassmann, F.; Behrendt, C. (Geneva, International Labour Office, 2006)

**Costing of basic social protection benefits for selected Asian countries. First results of a modelling exercise. Discussion paper 17**

Mizunoya, S.; Behrendt, C.; Pal, K.; Léger, F. (Geneva, International Labour Office, 2006)

**Envejecimiento, empleo y protección social en América Latina**

Bertranou, F.M. (coord.) (Santiago, Oficina Internacional del Trabajo, 2006)

**Institutional change and its impact on the poor and excluded. The Indian decentralisation experience**

Narayana, D. (Geneva, International Labour Office; STEP, 2006)

**La contribution des systèmes de protection sociale dans la lutte contre la pauvreté. Exemples de la Guinée, du Mali, de la Mauritanie et du Sénégal**

(Dakar, Bureau international du Travail, 2006)

**Minimum income and social integration. Institutional arrangements in Europe**

Kazepov, Y.; Sabatinelli, S. (Geneva, International Labour Office; STEP, 2006)

**Pension reform in the Baltic States. Estonia, Latvia, Lithuania**

Fultz, E. (ed.) (Budapest, International Labour Office, 2006)

**Perspectives on the social security system of China. ESS Paper 25**

Drouin, A.; Thompson, H.; et al. (Geneva, International Labour Office, 2006)

**Social exclusion in Central-Eastern Europe. Concept, measurement and policy interventions**

Lelkes, O. (Geneva, International Labour Office; STEP; European Centre for Social Welfare Policy and Research, 2006)

**Social protection and inclusion. Experiences and policy issues**

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