

## **Report**

# **Interregional Tripartite Meeting on the Future of Social Security in Arab States**

Amman, 6-8 May 2008

The Social Security Department of the International Labour Office (ILO) is the unit through which the ILO provides technical assistance and advice to its member countries in the area of social security policy and governance; develops policies to support the extension of social security to all and social inclusion; promotes international social security standards and develops and disseminates tools to support the effective governance of social security schemes.

In 2001, the International Labour Conference (ILC) reached a consensus that high priority should be given to policies and initiatives to extend social security to those who are not presently covered. Accordingly, the ILC directed the ILO to launch a major campaign to promote the extension of social security coverage. The Social Security Policy Briefings series is produced in the framework of the Campaign; it aims to set out the views of the Social Security Department in areas of particular importance, and so provide guidance to ILO member countries in the formulation of their social security policies.

It thus complements the existing Issues in Social Protection Discussion papers series and the Extension of Social Security series published by the Social Security Department by making available a comprehensive set of information tools.

International Labour Office  
Social Security Department  
4, route des Morillons  
CH-1211 Geneva 22 – Switzerland

Tel.: (+ 41 22) 799 75 65

Fax: (+ 41 22) 799 79 62

[SECSOC@ilo.org](mailto:SECSOC@ilo.org)

<http://www.ilo.org/secsoc>

# **SOCIAL SECURITY POLICY BRIEFINGS**

**Paper 5**

**Report**

**Interregional Tripartite Meeting on  
the Future of Social Security in Arab States**

Amman, 6-8 May 2008

**Global Campaign on Social Security and Coverage for All**

**Social Security Department, Geneva  
International Labour Office**

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## Contents

	<i>Page</i>
Preface.....	v
Introduction.....	1
Background.....	1
Objectives, scope and targeted outcome of the meeting.....	2
Issues addressed in the meeting.....	3
Organization and participation.....	4
Summary of proceedings.....	7
Opening ceremony.....	7
Trends and challenges in social security.....	8
Evolution and perspectives of social security in Arab States.....	11
Improving Basic Social Protection for All: The Debate on the Basic Benefit Package and ILO Standard Setting.....	12
Reforming Old-Age, Disability and Survivors' Protection.....	14
Strategies for the Extension of Unemployment, Maternity and Health Care Benefits.....	15
Strategies for the Extension of Social Insurance Benefits to Wider Groups of the Population.....	16
Strengthening the Governance of Social Security Systems.....	18
Building Capacity for Social Security.....	19
International Standards in Social Security.....	20
Concluding remarks: Orientation for Regional Action in Strengthening Social Security.....	21
ILO Conclusions of the Meeting.....	23
Brief summary of the discussions.....	23
Future ILO activities in the region.....	24
Agenda of the meeting.....	27
List of participants.....	31
Governments.....	31
Employers.....	37
Workers.....	40
Observers.....	42
Resource persons.....	43
Organizing institutions.....	44
Appendix. The Future of Social Security in Arab States in the Middle East and North Africa.....	49



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## Preface

This publication is the outcome of the Interregional Tripartite Meeting on the Future of Social Security in Arab States, held in Amman, Jordan, from 6 to 8 May 2008. This meeting was organized jointly by the Social Security Department of the ILO, the ILO Regional Office for Africa in Addis Ababa, the ILO Regional Office for Arab States in Lebanon and the Arab Labour Organization (ALO). The Government of Jordan kindly accepted to host this meeting and entrusted this responsibility to the Social Security Corporation of Jordan.

This publication has been prepared by the Social Security Department and it is largely based on the material provided by the ILO Regional Office for Arab States. It is issued within the framework of the follow-up activities of the Global Campaign on Social Security and Coverage for All, launched during the International Labour Conference of June 2003, in fulfilment of a commitment given to the Office by this Conference in 2001.

The report reflects the major points of the discussions held following the presentations prepared by the representatives of the countries invited to the meeting, namely: Algeria, Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Palestinian Authority, Qatar, Saudi Arabia, Sudan Syria, Tunisia, United Arab Emirates and Yemen. It also includes summaries of the presentations by ILO officials, representatives of employers' and workers' organizations, the International Social Security Associations (ISSA) and representatives of international organizations such as the Economic Commission for Latin American and the Caribbean (ECLAC) and the World Bank, as well as of regional experts.

All the presentations dealt with key aspects of social security, therefore the debates of the meeting focussed on managerial, gender and coverage challenges that the schemes of the region are facing. The participants have also highlighted the need for early investments in social security in the development process and they recognized the importance of social security as a powerful instrument to stabilize societies. The ILO conclusions of this meeting underlined the commitment of the Organization to assist countries in closing coverage gaps, in particular, in the informal economy, in the access to essential health care for all, in the adoption of social measures for children, the unemployed and the poor and income protection for the elderly and the disabled. This could be done by establishing a basic benefit package in order to guarantee basic social protection for all. In its conclusions, the ILO also committed to continue providing technical support for the ratification of social security conventions in the region.

Michael Cichon  
Director  
Social Security Department





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## Introduction

### Background

At the 14th ILO Asian Regional Meeting held in Busan, Korea, in August/September 2006, the tripartite delegates launched an Asian Decent Work Decade up to 2015, and committed themselves to the achievement of specific decent work outcomes during this period, in accordance with their respective national circumstances and priorities, and to cooperate on specific initiatives at the regional level where joint action and sharing of knowledge and expertise will contribute to the realization of decent work. The conclusions of the Meeting identified a set of priorities for realizing decent work in countries of the region. One of the priorities is “extending the effectiveness and coverage of social protection for all, including workers in the informal economy.” In support of national efforts, the member states requested that the Office should assist their governments and social partners to consolidate and integrate action in a number of fields, including “establishing benchmarks and good practices on the extension of social protection to all working women and men and their families.”

At the 11th African Regional Meeting which took place in Addis Ababa in April 2007, tripartite delegations also committed themselves to a series of targets for the development of integrated Decent Work Country Programmes to accelerate progress towards the achievement of agreed international development goals, including the Millennium Development Goals. The Meeting also committed itself to the African Decent Work Decade for the period 2007-2015, following up on the conclusions of the Ouagadougou Summit of 2004 and its Declaration, Plan of Action and Follow-up Mechanism on Employment and Poverty Alleviation in Africa. The African Regional Meeting concluded that all African countries should adopt coherent national social security strategies which would also foresee the introduction or extension of a basic social security package.

In this context, a tripartite inter-regional meeting was organized in order to review and assess the range of relevant options which member States of the Arab World may wish to employ for the extension of social security coverage and the strengthening of social security in the Middle East and North Africa. This meeting pursued the mandate given to the ILO at the International Labour Conference of 2001 and reflects the commitments made at the African and Asian regional meetings on the extension of social security under the Global Campaign on Social Security and Coverage for All, launched in 2003<sup>1</sup>. The meeting also considered the Arab Labour Organization’s Strategy for Social Security. Against this background, the meeting provided countries with strategies to move further towards the achievement of the Millennium Development Goals.

Hosted by the Government of Jordan, the meeting was held from the 6th to 8th of May, 2008, in Amman, under the patronage of the Minister of Labour of Jordan, H. E. Bassem

<sup>1</sup> The Global Campaign on Social Security and Coverage for All responds to a request from the International Labour Conference of 2001, following its General Discussion on the basis of Report VI submitted to that Conference, “Social Security: Issues, Challenges and Prospects”, that “a major campaign should be launched in order to promote the extension of coverage of social security” (item 17 of the Resolution and Conclusion concerning social security, International Labour Conference, 89th Session, 2001). Since 2003, a component of almost all of the activities of the ILO’s Social Security Department has been directed to the raising the awareness of the Organization’s tripartite constituents as to the importance of this issue. In a number of countries (including Jordan), the constituents have felt ready to signal their commitment by means of a formal, national launch of the Campaign.

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Al Salem, and with the outstanding support of the Social Security Corporation of Jordan. The meeting was organized on a fully collaborative basis between the Government of Jordan, the Arab Labour Organisation (ALO) and the ILO. The collaboration between ALO and the ILO in the organisation of this event took place in the context of the renewed Memorandum of Understanding between the ALO and the ILO, signed on 8 November 2007.

## **Objectives, scope and targeted outcome of the meeting**

The broad objective of the meeting in addressing this above mentioned challenges was to identify a set of policy approaches within which participating countries can pursue effective and progressive extension of social security coverage, in particular to women and the unemployed and to workers in the informal economy, taking advantage of, and building on already existing initiatives of the national social security institutions and also of the ALO's and ILO's capacity to promote dialogue between the social partners to this end.

The specific objectives, as set up in the Governing Body document GB.302/Inf.2 were, accordingly:

- to provide a forum for discussing social security trends and challenges in the two regions;
- to identify best social security practices from other regions and develop a long-term social security strategy for the Arab- speaking countries of the two regions, taking into account their economic, social and cultural diversities and strengthen collaboration between Arab countries;
- to prepare for the later publication of a guide for the development of social security in Arab-speaking countries.

The targeted outcome relates to realising the objectives of the African and Asian Decent Work Decades of extending social security, notably to women and the unemployed and to workers in the informal economy. It further relates to ensuring the sustainability of existing social security schemes through adequate reforms. More particularly, existing gaps and priority needs will be identified, with a view to be addressed by the adoption of targeted solutions at national and regional levels based on an extensive exchange of national and international experiences and best practices. This requires to take into account the principles embedded in ILO social security standards, and more particularly in the Social Security (Minimum Standard) Convention, 1952 (No. 102).

In addition, the meeting served as an opportunity for the participating countries to approach a deepening commitment to regional cooperation, including networking for the sharing of knowledge, experiences and expertise. The ILO assisted the discussions of the meeting in promoting a well-articulated understanding, on the part of the participating countries, of the significance and technicalities of extending social security coverage and reforming existing schemes and finding optimal means towards sustaining these efforts.

Finally, practical means were identified through which the ongoing commitment of participating countries to these specific objectives may be adequately facilitated, through, *inter alia*, the strengthening of their administrative capacities. Such examples may be the drafting of relevant social security legislation and its implementation, and the improvement of the available data to facilitate the measurement of progress towards full social security coverage. The support required from ILO and other relevant institutions in this respect was identified accordingly.

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## Issues addressed in the meeting

Throughout the Arab world, social security faces a variety of challenges, some of which are common to many countries in the region. Although economic performance has been relatively favourable in large parts of the region, economic growth has not fully translated into a sufficient increase in quality employment. While across the region, women's labour force participation rates are rapidly increasing; female labour force participation is still low by international standards, which translates into the low social security coverage of women. In addition, growing unemployment and underemployment, which affects mainly women and young people, leads to increased informality and lack of social security coverage which leaves a large proportion of the population very vulnerable. The extension of social security to uncovered groups of the population is therefore a major concern.

Furthermore, many of the existing social security schemes covering workers in the formal economy are in the process of maturing and thus need to be carefully reformed so as to maintain their effectiveness, sustainability and good governance. Besides, these schemes often provide only coverage for old-age, invalidity and death pensions, while the insurance branches covering short-term benefits, such as sickness, maternity and unemployment benefits, are still not implemented. Against this background, there is a need for governments, workers and employers in Arab countries to develop national social security strategies in order to extend coverage to the unprotected population and to progressively provide a wider range of social security benefits. These strategies should be closely linked to employment strategies and other social policies.

That being said, social security is high on the political agenda in many countries of the region and features as one of the main priorities in many of the ILO Decent Work Country Programmes in the region. Pursuing to the Global Campaign, the extension of social security coverage for all is also one of the regional priorities for the ILO Regional Office for the Arab States for 2008-2009 and has been identified as a country priority in several Decent Work Country Programmes in the region.

The extension of social security coverage in the Arab World and sustainable reforms of existing social security systems were the main topics addressed during the discussion. Thus, the presentations and discussion were focussed on the following sub-topics:

- Enhancing effectiveness and efficiency of social security schemes.
- Strengthening the governance of social security schemes (with particular reference to the role of tripartite constituents in ensuring transparency and good governance, and promoting social security).
- Supporting the integration of unemployed persons into the labour market through the provision of unemployment benefits.
- Enhancing social security coverage of women and extending coverage to workers in the informal economy;
- Promoting international labour standards in social security;
- Promoting gender equality in social security.

In preparation for the discussions, participants have been more specifically requested to reflect on directions for promoting social security at the national level, with particular emphasis on the extension of coverage; to consider the role of tripartite constituents in promoting social security; to reflect on a regional strategy to strengthen social security in member states and in the region; and to identify the support needed from the ILO and other organisations at the regional level (see Agenda of the meeting). Furthermore, the ILO prepared a background technical document which is in the Appendix to this report.

## Organization and participation

The meeting reflected as fully as possible the very wide spectrum of past traditions and future needs as regards social security in Arab speaking countries. Accordingly, the following countries were invited: Algeria, Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Palestinian Authority, Qatar, Saudi Arabia, Sudan, Syria, Tunisia, United Arab Emirates and Yemen. Participating states were asked to nominate high-level government delegates not only of considering their Ministries of Labour and/or Social Security but also, in order to capture the widest possible dimensions of social protection, other concerned Ministries, such as Ministries of Health, Finance or Planning. Invitations to workers' and employers' organisations were extended following normal ILO procedures. In view of the particular gender context of the region, participation of women in the meeting has been explicitly encouraged.

The meeting was attended by 61 participants, including 35 from governments (including social security institutions), 13 employers and 13 workers from 15 Arab countries. The gender balance of the meeting was strongly biased towards men, with only 15 per cent female participants. Three participants had to cancel in the last minute. Nominated government representatives were equally divided between officials from Ministries of Labour (7) and from the social security institutions (7) (see List of participants).

**Table 1. Participation in the meeting**

Country Of which	Government		Employers		Workers		Total	
	Total	Women	Total	Women	Total	Women	Total	Women
Algeria	-	-	1	1	-	-	1	1
Bahrain	2	2	1	-	1	-	4	2
Egypt	*1	-	1	-	1	-	3	-
Iraq	(1)	-	1	-	-	-	1	-
Jordan	*23	3	1	-	1	-	25	3
Kuwait	*3	1	1	-	1	-	5	1
Lebanon	(1)	-	1	-	1	-	2	-
Libya	-	-	-	-	-	-	-	-
Morocco	1	-	-	-	1	-	2	-
Oman	1	-	1	-	1	-	3	-
Qatar	-	-	-	-	-	-	-	-
Palestine	1	-	1	-	1	1	3	1
Saudi Arabia	*1	-	1	-	1	-	3	-
Sudan	-	-	-	-	1	1	1	1
Syria	*(1)	-	1	-	1	-	2	-
Tunisia	*1	-	1	-	1	-	3	-
United Arab Emirates	-	-	-	-	-	-	-	-
Yemen	*1	-	1	-	1	-	3	-
Observers, resource persons and members of organizing institutions							31	13
<b>Total</b>	<b>35</b>	<b>6</b>	<b>13</b>	<b>1</b>	<b>13</b>	<b>2</b>	<b>92</b>	<b>22</b>
<i>Percentage of women (%)</i>		<i>17</i>		<i>8</i>		<i>15</i>		<i>24</i>

Note: \*) Including one or more participants from social security institutions.

Numbers in brackets: Participants who had to cancel their participation in the meeting on short notice. They are not included in the totals.

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Invitations on an observer basis were also extended to the international agencies most closely concerned, i.e. ISSA, UNDP and the World Bank.

Participating countries contributed their relevant experience by means of presentations in plenary session. The social partners were allocated time after each session for questions and comments. Participants contributed to focused thematic discussions with a view to reaching joint conclusions on the content of a regional strategy on strengthening social security in the two regions.

Discussions were held in Arabic, with simultaneous interpretation into/from English and French.



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## Summary of proceedings

The following paragraphs provide a summary of the presentations and discussions held at the meeting.

### Opening ceremony

The meeting was opened by **Mr Omar Razzaz, Director General of the Jordanian Social Security Corporation** on behalf of the Minister of Labour, H. E. Bassem Al Salem. Welcoming the participants in Amman, he highlighted the importance of tripartite meeting as an opportunity to upgrade social security systems so as to provide a decent life and secure living conditions, and good pensions for Arab labour. He explained that the debates and discussions during the meeting would focus on the role of the social security institutions in preserving the consistency of the social security in the Arab countries. He expressed his hope that this meeting would provide a forum to share regional experiences, find joint solutions and agree on regional strategies to reform and extend social security. These considerations have also provided a solid foundation for the new draft Jordanian social security law which is currently under discussion in Parliament. He further emphasized that the meeting would contribute to achieving the decent work objectives as declared in Busan in April 2006 and in Addis Ababa in April 2007 including the extension of social security coverage, and expressed his hope that the meeting would contribute to strengthening the capacity of social security systems based on close cooperation between the tripartite partners.

**Mr Adnan Abu Ragheb, Deputy Director-General of the Arab Labour Organisation (ALO)**, speaking on behalf of the Director-General of the ALO, H. E. Mr Ahmed Luqman, referred to the cooperation agreement between the ALO and the ILO. He stressed the importance of social security as one of the core elements of social policy. In Arab countries, the ALO has given special importance to social security, as reflected in its constitution and conventions. ALO Convention 3 specifies the minimal requirements for social security. ALO Convention 14 regulates social security rights for migrant Arab workers in Arab countries. The Arab strategy on social insurance, which was adopted in 1999, specifies the strategic motives, the national and regional objectives, and the required implementation procedures. The ALO further promotes social security in Arab States through its Arab Center for Social Insurance in Khartoum which works on promoting social security awareness, and increasing the capabilities of social security workers through conducting studies and researches, and organizing discussion sessions and training.

In her opening remarks, **Ms Nada Al Nashif, Director of the ILO Regional Office for Arab States in Beirut**, emphasized that strengthening social security had been a priority for most countries throughout the Arab region to provide social justice and thus, ensure a decent life for its citizens. Not all societies can attain the same level of social security for their citizens; however, it is necessary that they provide minimal level of inclusive social security, especially with respect to health care, and in case of unemployment, old age and disability, occupational injury, and maternity. As one element of decent work, the ILO prioritizes the extension of social security coverage in its strategies and projects in the Arab region. Some countries in the region have already taken bold steps to extend coverage of social security to previously uncovered groups of the population and introduced new branches of social security, such as the recently introduced unemployment insurance scheme in Bahrain, the proposed maternity insurance in Jordan, as well as in the ILO's current preparations for technical cooperation projects to reform the social security schemes in Syria and Yemen; in addition to conducting studies on social protection in the informal sector in Jordan, Syria, Egypt, and Yemen. In conclusion, she expressed her

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confidence that the meeting would reach effective recommendations and give clear guidance to the future.

The *Director of the Social Security Department of the ILO, Mr Michael Cichon*, introduced the objectives of the meeting. Following the ILO Regional Meetings for Asia (Busan 2006) and Africa (Addis Ababa, 2007), he highlighted that this interregional tripartite meeting should concretize the Decent Work Decades for Africa and Asia in the field of social security and refine this strategy for the Arab region. The 89th session of the International Labour Conference in 2001 had concluded that countries should develop a national strategy for social security, and had charged the ILO with organising a global campaign for the extension of social security. Highlighting the global context of the campaign, the meeting should result in clear guidance for future work based on a comprehensive assessment of the current situation as well as positive and negative experiences from this and other regions.

## Trends and challenges in social security

The session on trends and challenges in social security was moderated by *Mr Omar Razzaz the Director General of the Jordanian Social Security Corporation*. In his opening remarks, he asked how strengthening social security systems could contribute to achieving social justice and equity, and in a wider economic context, to developing national economies, industrial sectors, and fostering regional progress? He emphasized that there are still many questions surrounding how to expand coverage and inclusion of all in Arab countries. Most Arab countries had to deal with many challenges in respect to social insurance, including the issues of pensions and income support to the elderly, health insurance, maternity leave, and unemployment over the last 30 years. Arab citizens have been very concerned about high inflation rates and the erosion of the purchasing power of pensions. He looked forward to discussing these issues during the coming days, and to learning from the experiences of Latin America and EU.

The first presentation by *Michael Cichon, Director of the Social Security Department of the ILO in Geneva*, laid out the ILO's global social security strategy and regional perspectives. In summarizing the history and current situation of social security in the Arab world, he stressed the variation of social security coverage in the region, with roughly between 10 and 90 percent of the population covered. While long-term benefits are relatively well established in Arab countries, there are gaps in short-term benefits, such as health protection, unemployment protection and rights-based social assistance for the poor. Turning to the case for social security in development policy, he highlighted that social security is a human right for everyone, as specified in the Universal Declaration of Human Rights (1948) and also in the Declaration of Philadelphia (1944). From the experience of OECD countries, it is also known that social security is an economic necessity which reduces poverty and promotes social and economic development. He stressed that countries can grow with equity by allocating resources on social protection rather than waiting for the benefits of economic growth to trickle down to the poor in the far-off future. In addition, evidence emerges that almost all countries can afford some social security, even the poorest ones. There is no other instrument in development policy that has the potential to make a difference.

The new social security policy paradigm of the ILO is based on a universal and progressive approach, focusing on social outcomes and based on the following ten basic principles: universal coverage, benefits based on rights, protection against poverty, income security, actuarial equivalence of contributions and benefit levels, guarantee of a minimum rate of return on savings, gender fairness, sound financing, fiscal responsibility, and state responsibility and good governance. He underscored that the ILO's support to the region is composed of three main elements: setting and promoting international standards, support



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in developing and implementing national social security action plans within the context of Decent Work Country Programmes, and developing a tool for voluntary monitoring of progress.

***Mr Danny Pieters, Secretary-General of the European Institute of Social Security and Professor for Social Security Law at the K. U. Leuven,*** presented the European experience. Referring to the results of a survey of the heads of social security institutions in Europe, he suggested that the following issues were the main concerns for European social security institutions: the ageing of the population, immigration, changes in family patterns, unemployment and the future shrinking of the workforce, overall economic situation, groups of workers not covered by social security, a certain decline in social ethics, rising expectations and demands, and privatization and decentralization. Based on the European experience, he emphasized the importance of popular support of social security, which is built on the principle of solidarity and a fair balance between rights and duties of the population. Such support is to be generated more easily if the social security system is transparent, if its rules are easily communicable and are being well understood by the population. He also stressed the relationship between social security and the economy in which one cannot exist without the other. One of the main lessons learned from the European experience is that without belief in these fundamentals of social security, the system would not be politically sustainable.

He emphasized the relationship between social security and democracy, as social security is one of the main pillars of a democratic system. However, short-term political considerations can also constitute a challenge to social security. If decisions do not provide immediate tangible results, it is politically difficult to take these hard decisions. Referring to the example the changing family structures in Europe, he explained that determining when social security is to be preserved and when it should change is certainly one of the most formidable challenges of policy makers. This is all the more challenging as no social security scheme stands by itself but is embedded into wider structures. There is a need for greater cooperation between different institutions to overcome the tendency of ministries, departments and institutions to work in isolation from each other. He also pointed to the need to introduce advantages and be aware of drawbacks of IT and new technologies, and to maintain and continuously improve internal structures of social security institutions in order to ensure that social security will remain functional in a globalizing environment.

The presentation by ***Mr Andras Uthoff, Officer in Charge, Division for Social Development of the U. N. Economic Commission for Latin America and the Caribbean,*** focussed on the Latin American experience in the field of social security. He started by pointing out that Latin America had been a large laboratory for reforms in social security during recent years. The main challenges in Latin America are driven by the fact that structural factors have limited the establishment of a labour-based welfare state: Being largely composed of medium income economies, the Latin America is the region with the world's highest inequality (GINI), it is undergoing rapid demographic transition (decreasing birth rate, fast aging populations), is suffering from wide-scale underemployment with some 10 per cent of the population unemployed but a large informal economy of about 50 per cent of labour force, and a relatively small tax burden, and these constitute important challenges for social security. However, he indicated that countries differ very significantly across the region, with some countries having a much longer tradition in social security than others. Income inequality tends to be reflected in the social security system. The reforms of the 1990s, which attempted to strengthen the link between employment and social protection through the inclusion of a fully funded pension pillar, simply reinforced existing inequalities by favouring those who could pay and excluding those who could not.

He suggested that one lesson that can be learned from the Latin American privatization experience is that the lack of solidarity mechanisms in social security leads to undesirable

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results. A more recent change in approach, which seems to generate more encouraging results, is based on the notion that employment should no longer be seen as the only mechanism for access to social protection. Based on the notion that everyone deserves social protection, this approach provides a better balance between incentives and solidarity, taking into account changes in demographics, family structures and the labour market. This new approach features sectoral programmes, health, pensions and anti-poverty social programmes. He pointed out that it is indispensable that such programmes are based on explicit, guaranteed and enforceable rights. He concluded that social security reforms are non-replicable processes; such experiences from other countries can only serve as general guidance, but cannot provide a blueprint for reforms in other countries.

Presenting the perspective of employers, **Mr Eric Oechslin, Adviser for Europe of the International Organization of Employers**, started by mentioning the two main challenges for the ILO and its constituents, namely the extension of coverage and ensuring the financial sustainability of social security schemes in the context of the alarming problems that the world is facing today, malnutrition, poverty, spread of malaria, climate change, AIDS, etc. He also referred to the relationship between social security and employment security, and stressed the close interrelations with employment policies, and wider economic and social policies. He emphasized that social security is not only a cost but is also an investment on the labour force, both for workers and employers, and that the financing structures need to be clear and transparent. With respect to the informal sector, he stressed on the importance of formalizing the informal economy, and raised the question of who should finance social security coverage of workers in the informal economy and their families. He stressed that if companies in the formal sector would have to pay higher contributions and taxes, there is a risk that this could result in a larger informal economy. Alternative approaches could include systems of micro-insurances for workers in the informal economy. He also underlined the necessity that each country finds its own approaches to the extension of social security and ensuring its financial sustainability. Referring to the role of employers in social security, he reconfirmed their participation in the Global Campaign for Social Security and Coverage for all, and stressed the role of employers in the management and supervision of social security schemes in the interest of good governance.

The workers' perspective was presented by **Mr Nezam Qahoush, Representative of the International Trade Union Confederation in Amman**. He emphasized that social security is an investment, not a cost. Where there are free, independent unions, it becomes easier to make social progress towards personal freedoms – legitimate representation for labour, harmonizing decision-making institutions. He noted that workers social rights have a long history including struggles of workers' organisations to attain these rights – that benefit all partners, both employers and workers. Tripartite cooperation contributes to the promotion of decent work for all people, a high standard of living and overall well-being. Social and economic development alone is not sufficient – a social dialogue must be orchestrated to create an inclusive social security system that includes women, workers in the informal economy and marginalized groups. Through such dialogue, each country should identify their priorities according to their domestic circumstances. The formal system should cooperate with NGOs to establish a national system for social protection. Since many workers and employers' organizations lack sufficient capacities on their own; they should share resources. ILO has adopted this multiple-partner approach, and is committed to fighting poverty and fostering tripartite cooperation. Governments of all countries around the world should be encouraged to ratify and apply Convention No. 102., which will benefit all employees in these countries.

The World Bank perspective was presented by **Mr Gustavo Demarco, Senior Economist in the Human Development Department, Middle East and North Africa Region**. He started by pointing out that the meeting took place in the right place at the right time – because Jordan is moving quite fast in reforming its social security system. While other

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countries are also making progress, there was much to be learned from the Jordanian experience. Social security in the World Bank's perspective is part of social protection policies, designed to protect the population against the risk of poverty – including social insurance, social safety nets, labour market analyses and policy advisory services (MILES approach), and youth (including youth unemployment, access to education, discouraging risky behaviours, lack of participation). The World Bank does not endorse any particular “recipe” on how to design a social protection program, yet there are some guiding principles – such as financial sustainability, equality, adequacy, affordability and extension of coverage. Other issues of concern include administrative efficiency, governance, and the integration of social insurance programs.

He emphasized that while some of the parameters of a social security system, such as the replacement rate for the average full career worker, reflect a social choice, not all the parameters of the system can be subject to social choice if they were to undermine financial sustainability. Most of the existing pension systems in the Middle East and North Africa region (MENA) are very generous and thus are unsustainable in the long term. There is a wide variety of pension coverage in MENA, and a large number of MENA countries where coverage is very limited – this of course needs to be changed. To make these systems feasible and affordable, certain elements must be defined, including how to avoid overlapping between benefits, or how to target poverty alleviation benefits, or how to design administrative systems that do not erode pensions. He noted that gaps in the existing range of protection mechanisms need to be addressed, namely in respect to unemployment insurance, health insurance and related issues. In conclusion, he highlighted the need to embed integrated social insurance programmes into larger social policies and expressed his hope that MENA countries may benefit from international experiences within and beyond the region.

## **Evolution and perspectives of social security in Arab States**

The session on the evolution and perspectives of social security in Arab States, was moderated by ***Mr Adnan Abu Ragheb, Deputy Director-General of the Arab Labour Organisation***. In his opening remarks, he highlighted that social security in the Arab region differs from one country to another, such that some countries have limited systems, while others have larger systems and benefits.

***Mr Hyam Mallat, former Chairman of the Board of the National Social Security Fund of Lebanon***, sketched out the evolution and perspectives of social security in Arab States. He noted that social security has developed based on the notion of solidarity between citizens with the aim of reducing poverty, and beyond this, protecting citizens from risks. Social security, in order to be efficient, effective and equitable, requires a solid legislative framework, and a well-functioning system of administrative services. He pointed out that Arab countries are under a serious demographic pressure associated with the increase of life expectancy, which is going to constitute a future challenge for old age pension systems in the region. He further discussed the various social security schemes that differ from one country to another. He emphasized the importance of good governance of social security and the importance of social expenditure in smoothing consumption and thus contributing to economic productivity. He also stressed on the importance of social security as a social project, and its effects on individuals, government, and the economy of a country.

***Ms Diana Jreisat, Liaison Officer for Arab Countries of the International Social Security Association***, commented on the evolution and perspectives of social security in Arab States. She noted the importance of challenges related to the labour market in the Arab world, including the increasing gap between rich and poor, poverty, unemployment rate, unorganized/informal employment. She presented an overview of social security schemes and provident funds, referring to case studies including Bahrain, Qatar and

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Tunisia being the first country to introduce health insurance. Turning to the issue of occupational accidents and diseases, she outlined several examples from other regions in the world from which lessons may be learnt for Arab countries.

With respect to unemployment insurance, which is implemented in few Arab countries, she highlighted the balance of rights and duties of the unemployed, namely with regards to actively looking for employment opportunities. She also noted that the expansion of coverage of social security is a particular priority, namely for workers in small and medium enterprises. Many employees and older persons not or insufficiently covered. In addition, she stressed the need to expand the umbrella of social security for example health insurance. Reforms of some of the existing pension schemes, some of which are based on a multi-pillar model, aim at expanding coverage, integrating complementary schemes and limiting early retirement.

In the general discussion which followed the presentations, the relation between equitable development of social security rights and the protection of labour rights was addressed; in addition to the consequences of unequal economic growth on social security schemes pertaining to high income inequality and low wages. It was highlighted that if social security schemes are managed in a transparent and democratic way, based on legal guarantees and social dialogue, it is not just an investment in people, but also a return for the future. It should also be ensured that the rights of future generations are included through ensuring long-term financial sustainability of the social security scheme. Further, the consequences of privatization in Arab countries were discussed with reference to the government's special role and responsibility in the governance and management of the schemes.

## **Improving Basic Social Protection for All: The Debate on the Basic Benefit Package and ILO Standard Setting**

The session on Improving Basic Social Protection for All: The Debate on the Basic Benefit Package and ILO Standard Setting was moderated by *Ms Nada Al-Nashif, Director of the ILO Regional Office for Arab States in Beirut.*

*Mr Krzysztof Hagemeyer, Policy Coordinator in the ILO Social Security Department in Geneva,* presented the joint ILO/UN DESA perspective on improving social protection for all. He started from the universal right to social security as laid out in the Universal Declaration of Human Rights, and concretized in internationally accepted labour standards, such as the Social Security (Minimum Standards) Convention, 1952 (No. 102). From an economic perspective, he noted, social security is very important as it reduces poverty and income inequality, and contributes to generate growth by raising demand, enhancing human capital and productivity. Experience from other countries showed that social security is part of the "institutional tissue" of a healthy economy. He stressed that efficient market economies not only need free market policies, but also strong institutions – of which social security is a major one. By this token, he noted, social security plays a major role in development – and without it, sustainable development is impossible.

He also referred to the fact that social security is also a political necessity – it enhances social justice, promotes peace, stability and social cohesion. It creates politically stable societies by also preventing conflict. A well-designed and governed social security scheme ensures the political and electoral support of citizens. If people are guaranteed a basic minimum level of social security through investments in education, health care and cash transfers, this has a clear positive social effect in countries at any stage of development. However, he observed that given that even after 60 years, social security remains a dream for 80 per cent of the global population, there is a need for a new development policy paradigm for social security. Few countries provide universal access to even basic social

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security that goes beyond covering only a minority of the population. In other countries that have relatively developed SS schemes, such as most MENA countries, there is room for improvement in terms of coverage and scope of social security.

He proposed a basic benefit package which is defined as a basic social security guarantee for all citizens – including universal access to essential health care; income security for all children through child benefits; some modest conditional support for the poor in active age (employment programmes, benefits, etc); and income security for those who are not able to work through basic, tax-financed universal non-contributory pensions, persons with disabilities and survivors. The question of affordability should be reversed – can any country afford not to provide basic social security? Countries should build at least basic social security schemes as a matter of human rights and as an economic and political necessity. Accepting this necessity, country-specific assessments can establish a cost estimate and possible sources of financing. Referring to ILO calculations, he demonstrated the results of such assessments for a number of countries, which showed that such a basic benefit package is in the reach of even the poorest countries in the world. This would require an evaluation of the fiscal space available, and a review of the possibility of increasing the effectiveness in government revenue and expenditure and the possible use of external resources for a transitory period. On a global level, ILO estimates show that such a global social floor would cost only 2 per cent of global GDP. He concluded the ILO, as a standard-setting organization, will continue to promote ratification and implementation of the Social Security (Minimum Standards) Convention (C. 102), but is also assessing the question of whether a new complementary new standard was necessary.

The discussion touched upon a wide range of issues. Employers drew attention to the relatively lower attractiveness of private sector employment as compared to public sector employment with better access to social security in many Arab countries, and the question of how to achieve better social security coverage in the private sector. They also raised the issue of fair trade and the extension of social security coverage to workers in agriculture. Workers noted two particularities in Arab States as compared to other regions of the world: first, a coalition of employers and governments against weak trade unions, and second, the unequal effects that the economic crisis has on workers as compared to governments and employers. They called on the ILO and others to promote social security as a right and an investment in the development of countries.

Attention was further drawn to the situation in the Occupied Territories where the population's aspirations to social security will not be achieved until there is peace and a tripartite understanding. The current situation is characterized by high unemployment (over 80 per cent in Gaza), high poverty rates (more than 60 per cent of Palestinian families) and a large informal economy. The situation of women is particularly difficult with a high percentage of seasonal, informal and unpaid labour. It was noted that since July 2005, the social security law has been abrogated, and accordingly, the private sector is no longer covered by mandatory pension insurance.

Another issue raised related to the feasibility of a tax reform which proved to be difficult to implement in many middle income countries given limited funding abilities. Further attention was given to the relationship between contributory and non-contributory benefits which should ideally complement each other, and together guarantee universal access to social protection. In addition, it was also noted that it is indispensable to have a clear understanding of the rights and responsibilities in the interest of good governance and a productive social dialogue.

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## Reforming Old-Age, Disability and Survivors' Protection

The session on reforming old age, disability and survivors' pensions was moderated by *Mr Krzysztof Hagemeyer, Policy Coordinator in the ILO Social Security Department in Geneva.*

The case of Jordan was presented by *Ms Nadia Rawabdeh, Director of Pension Directorate, Social Security Corporation.* Focusing on the new draft social insurance law, she explained the main changes envisaged in the draft law which aims at establishing greater equity between the generations. She noted that the draft law foresees the indexing of pensions which will avoid the substantial decline in purchasing power over time and increase the level of protection of pensioners. The new draft law also clarifies and extends the coverage of social insurance in Jordan. Further changes concern the reform of eligibility criteria for disability and survivor pensions. The most contested element of the reform concerns the reform of early retirement pensions which addresses the imbalance between contributions paid and benefits received, as she highlighted, early retirees in the current system on average received ten times more than what they put into the system.

The case of **Kuwait** was presented by *Mr Jassim Alkandari of the Ministry of Social Affairs and Labour* and it was centered on the Kuwaiti social assistance system. He explained that Kuwait attempts to achieve security and solidarity between the Kuwaiti beneficiaries of the social security system, which functions on the basis of Islamic imperatives to provide for all members of society and encourages social solidarity. These principles, which are the basis for Kuwaiti law, provides for family and public assistance for those whose income is inadequate, and who consequently receive assistance such as housing assistance, etc. The programme according to which the state provides assistance for families/individuals facing difficult financial situations is funded by the State Treasury, as required by the social assistance law. This system complements social insurance and provides benefits for those who are not covered under the social insurance umbrella with a view to preventing poverty and deprivation. Public assistance beneficiaries include students, disabled, orphans, widows, divorced, ill, financially disadvantaged, girls, prisoners families, Kuwaitis married to non-Kuwaitis, and the elderly. In addition, there are many services provided by the Ministry, including assistance in paying real estate loans, paying back residence loans, disbursing money for children's clothes and utilities, as well as assistance for families living in rented housing.

*Mr Abderazzak Talib, Head of the Department for Social Security and Solidarity of the Ministry of Labour and Profession Training of Morocco,* presented the recent reforms of the **Moroccan** social security system which is composed of four schemes: The National Pension Fund for the Private Sector, the National Pension Fund for the Public Sector, the Fund for Temporary Employment and the Professional Pension Fund. These four social security schemes face specific challenges including the shifting balance between contributors and beneficiaries, financial sustainability, and the governance of those funds. The discussion on the reform of pension system has been going on since several years. Two tripartite committees have studied reform proposals and developed certain recommendations. Under the guidance of the Ministry of Finance, an international study is currently assessing reform options, and conclusions are expected for March 2009. In addition, ILO and the World Bank have been contacted for professional support through holding meetings and training in this regard.

As no government representatives of Sudan were present, *Ms Iman Batory, Secretary of Social Affairs of the Sudanese Trade Union Federation,* kindly agreed on very short notice to present the case of Sudan. She presented the emergence of social insurance in Sudan and the recent efforts to extend coverage of social insurance to all employees in the public and private sector for the contingencies of old age, disability, death of the

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breadwinner, occupational injury and diseases and health care for some groups of the population. She emphasized to what extent social insurance and social assistance are in the interest of beneficiaries. The two insurance funds are managed by one unified tripartite Board of Directors which is considered as a first step towards reform of the social insurance system. She also noted the importance of the Zakat charity system governed by the Zakat Bureau which tackles poverty in Sudan through direct transfers, mainly focusing on widows and orphans.

During the discussion, workers noted the need to identify responsibilities and find better methods to improve social protection in order to ensure the performance of the social security system, especially with regard to financial sustainability. Reference was made to the role of the state as the ultimate guarantor of deficits of the funds in some countries, the importance of regular monitoring and rules of accountability, and the role of social partners in the governance of the schemes and in continually ensuring the performance of the scheme. Employers noted the need to improve investment strategies for social security funds. Another issue discussed with reference to the Jordanian draft social insurance law was the effect of the increase of retirement age on employment, in particular on youth employment, and with regard to the lack of job security and high rates of youth unemployment. It was noted that early retirement has negative effects on the economy because of a loss of productive workers, especially if, as an example from Jordan shows, many people retire at 45 while average life expectancy stands at 72. Further reference was made to the extension of coverage and the question of how to ensure that all elderly can enjoy at least a basic level of income security in old age and have access to health protection.

### **Strategies for the Extension of Unemployment, Maternity and Health Care Benefits**

The session on strategies for the extension of unemployment, maternity and health care benefits was moderated by *Mr Tharcisse Nkanagu, Coordinator for Africa, Social Security Department, ILO Geneva*. He pointed out the importance of the presented social security reforms for providing social justice and contributing to the economic and social progress of the countries.

The case of the introduction of an unemployment insurance scheme in **Bahrain** was presented by *Ms Amal Al Matrook, Officer-in-Charge of the Department of Employment and Training, Ministry of Labour of Bahrain*. The Law, adopted in November 2006, provides social protection for the unemployed. Three institutions are concerned, the Ministry of Labour, the Ministry of Social Affairs and the General Organisation of Social Insurance. The insurance scheme is funded by monthly contributions of workers, employers, and the government (each 1 per cent of the wage of the insured). Two types of benefits are provided, compensation for those unemployed with a minimum of 12 months of contribution (60 per cent of the previous wage to a maximum of BD 500), and assistance at a rate of BD 150 for university graduates and BD 120 for others.

*Ms Shireen Al Qudah, Head of the International Cooperation Section of the Social Security Corporation of Jordan*, presented the proposed maternity insurance scheme which is incorporated in the new draft Social Insurance Law in Jordan. She pointed out that across the world, women have an increasing role in the society and the economy. However, in Jordan, only 15 per cent of the women are economically active, of the lowest percentages in the world, and unemployment amongst women is double that of men. Responding to the low labour force participation of women, particularly in the private sector, and their low social security coverage, the government had started to consult international organizations to improve the existing law based on international labour standards. Addressing one of the obstacles in employing women, a new maternity

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insurance would replace the previous system where individual employers were liable to pay their female employee's salary during maternity leave. The maternity insurance would be funded by contributions from employers (0.5 per cent of the salary of the insured persons – both women and men) and workers (0.25 per cent), which is a relatively small amount. The introduction of this maternity insurance scheme would help better integrate women in the economy and contribute to gender equality.

**Mr Mohamed Chaabane, General Director of the Social Security Research and Studies Center, Tunisia,** presented the Tunisian experience in extending social protection, as the Arab country with the highest coverage rates in the region. He summarized the long experience Tunisia has since its independence in extending social security and fostering social and economic progress. The extension of social security coverage started in the organized sector, and now it has reached the coverage of the unorganized sector such as domestic workers as well as Tunisians abroad. The mechanisms for the extension of coverage which have been applied in Tunisia include awareness raising campaigns, the facilitation of administrative procedures in social insurance. He stressed that as a result, Tunisia has achieved impressive improvements in coverage, with more than 90 per cent of workers covered, and close to half of the elderly population receiving an old age or survivors' pensions. In addition, as far as social insurance programmes are not sufficient, Tunisia provides extensive support for the poor through social assistance programmes. The social security system has contributed to the expansion of the middle class and to the decrease of poverty levels to less than 4 per cent of the population. The main challenges, as he pointed out, pertain to seasonal workers, the low contributory capacity of workers on low wages, geographic dispersion and a lack of awareness and tradition in preparing for the future.

The discussion touched upon a range of issues. With regard to the implementation of unemployment insurance, concerns were raised whether this would create incentives for first-time jobseekers and workers to become or stay unemployed rather than seriously look for a job. However, it was replied that the linkages with employment services and training, and the strict conditions of eligibility in the unemployment protection scheme ensure that such perverse incentives would not occur. Questions concerning the maternity protection scheme concentrated on the possibility for women to extend their maternity leave if necessary and on job protection during extended maternity leave. Specific reference was made to the current difficulties of health insurance in Lebanon which could not be presented due to the fact that the Lebanese government representative had to cancel on short notice.

## **Strategies for the Extension of Social Insurance Benefits to Wider Groups of the Population**

The session on the extension of social insurance benefits to wider groups of the population was moderated by **Ms Regina Amadi-Njoku, Director of the Regional Office for Africa, ILO Addis Ababa.** In her opening remarks, she noted that economic growth without adequate and decent employment and social security cannot lead to sustainable development and will lead to poverty among the most vulnerable groups of society. What is worrying in the Arab region is the high percentage of workers in the informal sector who are not entitled to be covered by social security. Every country should develop its own strategy that is appropriate in its case, however, in the end, all countries should reach the same outcome of attaining proper coverage for all citizens.

The case of **Egypt** was presented by **First Undersecretary of State, Ministry of Finance, and Head of the Public and Private Sector of the Social Insurance Fund, Egypt.** He referred to the long history of social security in Egypt which is a very comprehensive system based on socialist principles and rigorous actuarial and statistical work. The



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extension of social security benefits to workers in the informal economy is based on the constitutional mandate of the state to provide for the elderly and sick. The system for providing for civil servants started in 1854, while for the public sector it started in 1936 with the first social security law. Another law covers workers in the informal economy; those three are mandatory, while the social security law for workers working abroad is voluntary. He sketched out the main characteristics of the social insurance system including pensions, health insurance and benefits for vulnerable categories of the population. The main challenges for the social security system, he explained, are contribution evasion and the reform of administrative procedures including the updating of the IT system.

The case of **Oman** was presented by *Mr Ahmed Al Busaidi, Director of Planning of the Public Authority of Social Insurance, Oman*. He started by pointing out that Oman has made real progress in the extension of social security, yet there are still major challenges to be met. The Omani approach is based on the understanding that social security is a human right and an economic imperative, and that social security is both administratively and financially feasible. Recent reforms include the expansion of pension insurance coverage and the creation of a voluntary scheme for Omanis working in the private sector whether in Oman or abroad, and a Gulf Cooperation Council Countries (GCC) social security agreement covering GCC workers working in Oman. He explained that the system faces major challenges in adapting the social insurance to rapidly changing demographic structures, to restrict the use of early retirement, and to achieve equity and justice in benefit provision, in particular for those with the least means, and the extension of coverage to the greatest number of people. This includes the consolidation of the unified system of GCC countries to provide social security coverage to nationals of other GCC countries according to the regulations of the country of origin or the worker. In addition, the possibility of covering of foreign nationals working in Oman will also be assessed in the context of the strategic five-year plan 2009-2013.

*Mr Awad Yahya Al Noami, Vice Chairman of the General Corporation for Social Security, Yemen*, presented the recent efforts to extend social security coverage in Yemen, namely to fishermen in 2006 and to migrant workers in other GCC countries in 2007. He explained that in the previous week, a new draft social security law was approved, was presented to the cabinet, and is currently under revision by the ministry of Social Affairs. This amendment aims to extend social protection and ensure sustainability. Since April 2007, migrant Yemeni workers in other GCC countries became covered by the law on a voluntary basis. However, coverage is still relatively low given the high numbers of migrant workers from Yemen. The extension of coverage for workers in Yemen faces the challenge of a large informal economy. Mr Al Noami suggested the following steps to facilitate the extension of coverage: a closer collaboration between the social insurance institution and the tripartite constituents, benefiting from successful experiences in other countries, including new social security branches such as unemployment, employment injury and maternity, intensifying training for staff of the social insurance institution, seeking collaboration among various partners and promoting the role of the social insurance institution within the country.

The discussion focused on a range of issues pertaining to the challenges in extending coverage. One of the issues mentioned were the particular challenges of covering workers in small enterprises and the question of how to ensure compliance from small enterprises. The importance of labour inspection was mentioned as one critical element in ensuring social security coverage for workers in small enterprises; other elements included the role of awareness-raising on the respective rights and responsibilities of workers and employers, and the application of penalties in the case of non-compliance.

Another issue raised was the level of pension benefits and their adequacy in relation to the overall standard of living, especially with regard to high levels of inflation. While the

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value of pensions tends to be relatively well protected for public sector workers, in many countries pensions for workers in the private sector are not fully indexed to the increases in wages and prices which leads to a marked deterioration of the relative standard of living of pensioners over time.

## **Strengthening the Governance of Social Security Systems**

The session on strengthening the governance of social security systems was moderated by *Ms Carmen Solorio, Coordinator for Latin America in the ILO's Social Security Department in Geneva*. In introducing the session, she pointed out that none of the strategies to improve and extend social security to greater segments of the population as well as maternity care is possible without good governance.

*Mr Fahad Howaimel, Assistant Governor of the Assistant Governor of the General Social Security Corporation, Saudi Arabia*, presented the case of **Saudi Arabia**, with particular reference to the experience in restructuring the social security institution's management system and board, which is composed of five government representatives and three representatives each of workers and employers, in order to ensure fair oversight. He pointed out the importance of a unified computerized system with effective monitoring facilities. He mentioned early retirement as a factor which constituted a long-term burden to the social insurance system and undermined the productivity of the workforce. Next to the social insurance with two branches (pension insurance and professional risk branch), other elements of the social security system in Saudi Arabia include the Military Pension Fund, the provision of health care (universal access guaranteed by the government), and a range of social assistance programmes overseen by the Ministry of Social Affairs, which includes programmes for disabled people, widows and orphans and charity housing. Recent reforms in the social insurance scheme include the introduction of voluntary coverage for self-employed and Saudi workers abroad, the reduction of women's retirement age from 60 to 55, a reform of the work injury compensation for Saudi and non-Saudi insured persons and the improvement of the portability of benefits between the different pension schemes.

The situation in **Palestine** was presented by *Mr Majed Attah Ziab Helou, General Director, General Retirement Commission of the Palestinian Authority*. He emphasized the diversity of experience of social security in Arab States, with a wide gap between the Palestinian and the Saudi Experience. The new social security law for Palestine of 2003 has still not been fully implemented because of both financial and political concerns. The operations of the General Retirement Commission, which is supervised by a tripartite board, as he pointed out, are hampered by administrative problems and the lack of critical information such as the number of beneficiaries and dependants. He explained that the General Law of Retirement, adopted in 2005, was aimed at reducing hardship created through the application of previous laws and provided for the payment of disability benefits, funeral expenses and survivor benefits, maternity benefits. There is a strong disparity of benefits provided for workers in the public and the private sector which would need to be addressed, as he pointed out, through integrating the systems for the private and public sector and a general reform of the social security system in order to address some of the challenges faced by the Palestinian population. The situation is exacerbated by the high levels of unemployment and poverty fuelled by the ongoing conflict. He pointed out that the separation wall, which has not only cut off agricultural land but has also stopped Palestine from creating unified institutions, has had a detrimental effect on Palestinian business. He finished by calling for an independent Palestinian state and the extension of political and technical support to assist the Palestinian workers and employers.

The discussion focused on a range of issues including the role of role of social partners as in the supervision of social security schemes and partners in reform. Questions related to

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the selection of workers' and employer representatives in countries where there are no workers' organisations. The issue of early retirement also came up several times during this session, with reference to the perceived benefits of reducing labour cost through offering "voluntary" early retirement schemes for older workers. It was emphasized that early retirement is not directly linked to an increase in employment opportunities for younger workers.

Specific reference was made to the situation in Palestine by several speakers from Palestine and elsewhere. Workers expressed their concern about the lack of tripartite involvement in recent policy decisions. They also consider the Presidential decree as a reduction rather than expansion of coverage, as health coverage remains voluntary for the private sector. Employers referred to the economic effects of the separation wall which deprives people of their economic and educational opportunities and limit access to health care. Several speakers called upon the ILO to extend assistance to Palestine.

## **Building Capacity for Social Security**

The session on building capacity for social security was moderated by *Mr Khaled Yassien, Director of the Arab Center for Social Security, Khartoum*. In his opening remarks he stressed the importance of technical capacities for the performance of social security throughout the region.

The range of ILO training programmes were presented by *Ms Lynn Villacorta, Senior Programme Officer, Social Protection Programme, International Training Center of the ILO, Turin*. After a short introduction on the history and mandate of the ILO-ITC, she sketched out the activities of the training center which holds regular courses in Arabic. Since 1999, 247 participants from 17 Arab were trained in Turin, with an increasing percentage (38 per cent during the last four years) of female participants. Participants have come from governments including social security institutions as well as from trade unions and employers, particularly targeting those who serve on national tripartite management boards. The methodology of the courses, as she explained, is highly-participatory, small group training based on peer learning among individuals working in similar institutions doing similar work – from the Arab region as well as EU context. Courses may also be adapted to the specific requirements of particular subregions such as the GCC countries of the Maghreb countries. The ILO also cooperates with universities to provide postgraduate specialised training in social protection financing, social protection design and actuarial studies together with the Universities of Maastricht and Lausanne. She also introduced the QUATRAN initiative which since 2007 offers training focused on quantitative techniques, with a large programme for the Latin America region, a similar program being launched for Africa in June, and a possible extension to the Arab States region to be considered if there is interest.

The discussion focused on the various training needs within the region, including distance training in Arabic, which are of particular interest in some parts of the Arab world, as for example in Palestine, as well as certified Master-level courses which match the specific requirements of the labour market in this field. Other questions related to the selection of topics and participants. Several participants indicated that they participated in the ILO training programmes in the past and expressed their appreciation for the quality of training received.

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## International Standards in Social Security

The session on international standards in social security was moderated by *Ms Nadia Awamleh, Manager of International Cooperation Department of the Social Security Corporation, Jordan.*

*Ms Ursula Kulke, Coordinator for Arab States and for Standards and Legal Services in the ILO's Social Security Department* of the ILO in Geneva, presented the International Labour Standards in Social Security and discussed how standards and the standard-setting process can be used to move forward in guaranteeing social security for all. She started by reviewing the ILO's mandate in the field of social security, mentioning the reference to social security in the preamble of the ILO Constitution, which was reaffirmed in the Declaration of Philadelphia (1944) and again in the conclusions of the 89th Session of the International Labour Conference (2001). The ILO was requested to launch a Global Campaign on Social Security and Coverage for All which was launched in 2003 on the global level and on the national level on Jordan in 2005. She explained that the ILO is unique in setting international labour standards, which can take the form of either Conventions or Recommendations, eight of which are up-to-date standards in the field of social security. The Social Security (Minimum Standards) Convention (C. 102) is the flagship convention which covers all of the nine branches of Social Security and sets minimum standards with respect to a minimum percentage of personal coverage, the minimum level of benefits, a maximum qualifying period for the entitlement to benefits and a minimum duration of benefits. Convention No. 102 also defines basic social security benefits including the principle of guaranteed defined benefits, the participation of protected persons in the administration, the general responsibility of governments, collective financing, equality of treatment and rights of appeal. Compliance with C. 102 can be achieved through social insurance schemes, universal schemes, social assistance schemes, administered by public or, to a certain extent, by private institutions. While C. 102 to this date has been ratified by 43 countries, several more countries, several more countries have expressed interest. While C. 102 remains of utmost importance to the member States of the ILO, she also explained that the need for a complementary mechanism it is currently being assessed. Such mechanism would complement C. 102 in view of assisting ILO member States in achieving universal access to a basic benefit package and would help them to establish higher levels of social security according to their level of economic and social development so as to progressively move towards the social security levels required by C. 102. Such mechanism would ultimately help countries guaranteeing the right to social security for everyone.

*Mr Khaled Yassien, Director of the Arab Center for Social Security, Khartoum,* presented the labour standards of the Arab Labour Organisation and the Arab Strategy for Social Security. He explained the objectives of the ALO and the range of labour standards, some of which are covering the field of social security, such as the Convention defining the minimum level of social insurance (No. 3) and the Convention on the right of workers to transfer between SS schemes when moving between Arab states (No. 14), as well as conventions on women and minors. The Arab Charter for Labour and the mandate of the ILO also reflect the right to social security in line with other international instruments and a number of international conventions/charters. The Arab Strategy on Social Security which was endorsed by the Arab Labour Conference in 1999 includes basic principles and objectives at the regional level and lays out strategies to achieve these objectives. He laid out the five objectives of this Strategy as follows: (1) Expansion of social insurance coverage; (2) improvement of social insurance benefits; (3) simplification of the procedures for disbursing benefits, (4) maintaining the purchasing power of pensions, (5) maintaining the rights of the insured. Coverage of Arab workers should also be achieved through the promotion of bilateral social security agreements. He also stressed the importance of exchange between countries in order to benefit from best practices and lessons learned, especially between more and less developed states. Also, there is a need

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for awareness-raising and capacity building in order to enable countries to improve social security.

During the discussions, one of the issues raised pertained to the reasons of why countries did not ratify C. 102. An ILO survey showed that most of the governments indicated that the main reasons were the lack of resources and a lack of administrative capacity to comply with the monitoring requirements. The survey also showed that there were some misunderstandings in the interpretation of C. 102 which could be clarified through technical assistance. Responding to concerns focusing on securing a basic level might undermine existing social security rights, it was clarified that a possible new anti-poverty instrument on a basic social security guarantee should complement the existing up-to-date standards, namely C. 102, and should contain a stepwise approach dependent on countries' level of development.

### **Concluding remarks: Orientation for Regional Action in Strengthening Social Security**

The final session providing orientation for regional action in strengthening social security was moderated by *Ms Regina Amadi-Njoku, Director of the ILO Regional Office for Africa, Addis Ababa*. Opening this session, she emphasized that social security is not just a good policy but is also a human right and an economic and political necessity. She observed that the question is not whether countries could afford social security, but that in a globalized world, countries could no longer afford not to provide social security. Considerable progress has been achieved on the global level, with political support from the EU, the UN and the G8. While emphasizing the importance of basic health care, income security, access to education and care, assistance when unemployed, and income support for the old and disabled, she stressed that social security does not stop at this basic benefit package. Social security continues to expand as economies develop, helping individuals climb the ladder to security. She pointed to the current challenges, such as the immense coverage gap and confirmed that participants were committed to close these gaps and ensure that people enjoy security in their lives.

*Mr Michael Cichon, Director of the Social Security Department of the ILO Geneva*, thanked all participants for their contributions to the meeting and for the clear mandate for action that they have given to the ILO to support the extension of social security. One of the main objectives of the meeting was to concretize the goals of past meetings (2006-7), in the framework of the ILO Global Campaign on Social Security and Coverage for All in the Arab region until 2015. The ILO conclusions of the meeting were then read to the Conference (see page 41 of this report).

On behalf of the Minister of Labour of Jordan, H. E. Mr Bassem Salem, the *Director-General of the Jordanian Social Security Corporation, Mr Omar Razzaz* expressed his hope that the actions discussed during the meeting will not remain only a dream but will be guided by clear vision. He pointed out that the Arab states are in bad need of both – vision and action, and require a long-term plan to orient their course in order to achieve their vision. Countries have adopted multiple strategies and approaches, and based on the Jordanian experience, he stressed that the minimum level of a common basic benefit package should be C. 102. He noted that in his opinion, it was unacceptable to have a single Arab state that has not ratified C. 102, as this Convention will not allow anyone to violate the rights that have already been attained in the Arab states. Calling on all Arab states to sign, ratify and implement C. 102 together, he invited fellow Arab states to agree on a minimum floor to avoid to descend lower, and then to consider ratifying other additional conventions.

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Recalling the considerable variation in social security coverage across the region, he called for joint action and joint commitment across the Arab world in order to join forces and realize the vision of achieving 90 per cent coverage for all workers within ten years. Some countries would be able to achieve this in two years and others in ten, he observed, but it is key that all agree that this must happen. He referred to the social contract, with social security as the basic pillar of national security by making people/citizens feel that they are linked with their governments and the institutions that provide for them. In order to avoid that the current generation lives at the expense of future generations, he urged participants to remind governments, employers and workers that there is one group not represented on social security boards – the future generations – who also have to be considered in the planning. Future generations should not be burdened with irresponsible expenditures of the present, he observed. Early retirement is one of the factors which is a burden on social security finances and needs to be limited in the context of continuous reform with the aim of extending coverage.

He noted four important areas for future action: First, pensions need to be complemented with health insurance. Second, referring to the role of women in the integral vision of social security reform, he pointed out that Jordan takes pride in investing in the education of women, yet this is not matched by women's involvement in the labour force, and that this challenge needed is being addressed among other measures by the introduction of a maternity protection scheme which should contribute to encouraging more women to work and encouraging employers to hire women. The third challenge he mentioned is the challenge of unemployment and underemployment with two-thirds of able-bodied adults not working. He referred to the Jordanian plans to establishing an unemployment insurance fund which should help to protect the unemployed while not creating any perverse incentives. Finally, he stressed the importance of institutional governance, and the need for accountability and transparency. He concluded by suggesting to meet again in ten years' time to compare experiences and assess progress in achieving the common visions..

The *Deputy Director-General of the ALO, Mr Adnan Abu Ragheb*, thanked participants for enriching presentations and discussions. Agreeing with ILO's conclusions of the meeting and pledging the ALO's support for them, he presented the ALO's conclusions of the meeting based on Arab experiences in the field. He noted that social security legislation in each country should be expanded in order to cover all workers, including those in the informal economy. He also urged Arab states to provide coverage for Arab workers working in other countries. Calling for the immediate ratification of the ALO convention No. 3 (1971) on the minimum level of social insurance and ILO Convention No. 102 (1952), he noted that Arab countries should step up efforts to implement effective social security reforms. This includes the establishment of social security schemes for unemployed citizens, paying particular attention to pensioners and increasing the minimum level of pensions, efforts to stimulate social insurance investments to finance social security schemes, the establishment of an Arab institute of actuarial studies, the promotion of more studies and research, awareness-raising, investments in IT systems and technology across the Arab World. He suggested that the ALO Strategy for Social Security should guide Arab countries in their reform efforts. He concluded by confirming the joint efforts of the ALO and ILO in supporting the development of social security schemes in Arab countries.

The moderator of this session, Ms Regina Amadi-Njoku, concluded by recalling the road-map for future action which shall be pursued in tripartite partnership including the ALO in order to advance the future of social security in the Arab world.

The meeting was officially closed by *Dr. Omar Razzaz, Director-General of the Social Security Corporation of Jordan*.

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## ILO Conclusions of the Meeting

1. One of the main objectives of the meeting was to concretise the recommendations of the ILO Asian and African Regional Meetings (in 2006 and 2007) on social security and provide orientation for the action of the International Labour Office in the framework of its Global Campaign for the extension of social security till 2015. The following paragraphs summarise the main elements of the discussions and the consequential action that the ILO suggests as a follow-up of the discussions.

### Brief summary of the discussions

2. The discussions during the three days of intensive deliberations on the identification of a set of policy approaches within which participating countries can pursue effective and progressive extension of the scope and coverage of social security, in particular to women, to the unemployed and to workers in the informal sector, and strengthening the governance of their social security schemes, based on the experience of the countries in the region, can be summarized as follows:
  - Recent developments in the region show that most countries have been working towards the extension of coverage of social security (including social assistance), extend the range of benefits and ensure good governance and financial stability. There is a widespread recognition that schemes still face problems in achieving full population coverage, and some in achieving good governance and abolishing some design flaws.
  - Seeking to extend at least a minimum set of social security guarantees to all is one of the core components of the ILO's Global Campaign on Social Security and Coverage for All. This is also a component of the basic benefit package that the office is promoting following its mandate to "further among the nations of the world programmes which will achieve ... the extension of social security measure to provide a basic income to all in need of such protection and comprehensive medical care"<sup>2</sup> that was formulated in 1944 and reaffirmed by the International Labour Conference in 2001<sup>3</sup> and recommended also by the World Commission on the Social Dimension of Globalisation<sup>4</sup>.
  - For all our constituents social security it is a social and economic necessity - a sine qua non of national and international development. It also ensures social and political stability. There is ample, evidence that social security systems in the region have played a major role in social and economic development.
  - However, no system is perfect and no system will perform well if not constantly adapted to changing economic, demographic and political challenges. Systems in the Arab states of the Middle East and North Africa are making honest and pragmatic efforts to reengineer schemes that seem to require improvements. In this meeting we have reviewed and confirmed the supervisory and executing roles of the state as the

<sup>2</sup> ILO constitution, Annex (The Declaration of Philadelphia), 1944.

<sup>3</sup> ILO: Social Security: A new consensus, Geneva, 2001, p. 1.

<sup>4</sup> World Commission on the Social Dimension of Globalisation: A fair globalisation: Creating opportunities for all, Geneva 2004, p. 110.

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central guarantor of social security, we also discussed the continuing importance of the participation of the social partners in the design, reform and governance of social insurance schemes. The meeting also pragmatically accepted the co-existence of different social protection schemes in the countries of the region provided that coherence in the objective of full population coverage is ensured.

### **Future ILO activities in the region**

3. In the framework of the Global Campaign for Social Security and Coverage for All, the ILO is committed to support national efforts towards full coverage and improved governance of social security in the Arab States of the Middle East and North Africa as a matter of priority in its Decent Work Country Programmes. The ILO will continue to advocate early investment in the development of social security systems in order to enable countries to grow with equity.
4. Ensuring that policy responses are well adapted to the national context, the ILO Campaign focuses on outcomes rather than process. No time will be wasted in debating the advantages or disadvantages of certain methods to deliver social security. Six pragmatic questions will guide ILO support in the context of the Global Campaign:
  - Do the schemes reach out to all? In particular to informal sector workers, women, unemployed persons and the poor?
  - Are the benefits effective in lifting people out of poverty?
  - Do they provide adequate, reliable and sustainable benefits to people?
  - Is their design conducive to achieve higher levels of employment and good economic performance in general?
  - Is the system/scheme making efficient use of workers' and employers' taxes and contributions?
  - Are the schemes designed, managed and governed with the adequate and fair participation of the government, employers and workers on the on the basis of social dialogue and national consensus?
5. There is a set of concrete measures that are being implemented or we hope to implement along the lines of the recommendations of the African and Asian Regional Meetings held in 2006 and 2007. They range from the creation and dissemination of the knowledge base to the provision of advisory services and the monitoring of progress and hopefully to a very concrete programme of technical co-operation:

- (1) Knowledge base

With the new Social Security Inquiry we are making a tool available that helps the countries to monitor their progress in a comprehensive fashion and at the same time benchmark themselves against other countries in the region. We would like you all to sign up to this Inquiry as a regular monitoring instrument.

We would like all countries of the region to sign up to the web-based interactive learning platform on the extension of social security (GESS) that the ILO is about to launch, This will ensure a constant exchange of experience and ideas between individual countries and between the ILO and its members.



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(2) Capacity building

The extension of coverage, the provision and good governance of the institutions, require well qualified staff. The ILO is ready to continue organizing training for its tri-partite constituency on: legislation, policy design, actuarial, financial and statistical matters and administration, in coordination with the Turin Centre and its partner universities.

(3) Policy development

We will continue providing advisory services aiming at strengthening the institutions involved in the planning and implementation of social security covering, inter alia:

- legal, managerial and supervisory aspects;
- the mainstreaming and safeguarding of social security objectives in the wider national legal and economic and fiscal policy frameworks;
- actuarial, financial, fiscal and social budget analyses.

This should ensure that the progress towards wider and better coverage is compatible with economic and fiscal capacity in each country.

We will continue to invite and technically support countries to ratify ILO social security conventions. We will also focus on assisting the countries in closing coverage gaps notably in the informal economy, by establishing a basic benefit package for all, i.e. access to essential health care for all, income security for children, social assistance for unemployed and the poor, income security for the elderly and disabled.

Some of the above elements have already been identified as priorities in the Decent Work Country Programmes in the region, and the ILO stands ready to support these elements in the DWCPs of further countries.

(4) Monitoring of progress

Countries should subscribe, with the support of the ILO, to a review system that allows them to self-monitor progress with respect to population coverage and good governance. Without such a self-binding mechanism progress might not be as rapid as it could be.

(5) Method

The vehicle for the support listed above should be a regional advisory and capacity building facility that can flexibly react to the very heterogeneous demands from the region. We will develop a blueprint for that facility within the next weeks and then seek funding for it within and outside of the ILO. We will also seek hosts or collaborative centres for it in one or two countries of the region.

**6.** We have participated in a very encouraging debate. We know that the ILO's Global Campaign and the Decent Work Agenda and, in particular, the African and Asian Decent Work Decades are in good hands in the region.

The Strategy for Social Insurance of the Arab Labour Organisation supports these objectives and we trust that the joint efforts of ALO and ILO in the Arab Region will contribute to reaching these objectives.

The representatives of the World Bank and the ISSA have agreed to seek co-ordination of their workplans with that of the ILO. Wherever possible joint work should be pursued.



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## Agenda of the meeting

6 May 2008

15:00 – 16:00

### Registration of Participants and Welcome Coffee

16:00 – 16:30

### Opening Ceremony

*H. E. Basem Al Salem, Minister of Labour, Jordan*

*H. E. Ahmad Luqman, Director General, Arab Labour Organisation*

*Ms Nada Al-Nashif, Regional Director for Arab States, ILO Beirut*

*Mr Michael Cichon, Director, Social Security Department, ILO Geneva*

16:30 – 17:45

### Trends and Challenges in Social Security

Moderator: *Mr Omar Razzaz, Director General, Social Security Corporation, Jordan*

- ILO's Global Perspective

*Mr Michael Cichon, Director, Social Security Department, ILO Geneva*

- Europe's Experience

*Mr Danny Pieters, Secretary-General of the European Institute of Social Security and Professor of Social Security Law, K.U. Leuven, Belgium*

- Latin America's Experience

*Mr Andras Uthoff, Officer in Charge of the Division for Social Development, Economic Commission for Latin America and the Caribbean, Santiago de Chile, Chile*

- Employers' and Workers' Perspectives

*Mr Eric Oechslin, International Organisation of Employers (IoE), Geneva*

*Mr Neham Qahoush, International Trade Union Confederation (ITUC), Amman*

- World Bank Perspective

*Gustavo Demarco, Senior Economist, Human Development Department, Middle East and North Africa Region, World Bank*

General Discussion

17:45 – 18:30

### Evolution and Perspectives of Social Security in Arab States

Moderator: *Mr Adnan Abu El Ragheb, Deputy Director-General of ALO*

- Evolution and Perspectives of Social Security in Arab States

*Mr Hyam Mallat, former Chairman of the Board of the National Social Security Fund, Lebanon*

- Commentary

*Ms Diana Jreisat, International Social Security Association, Sub-regional Office for Arab Countries*

General Discussion

18:30

### Group picture

20:00

### Dinner hosted by the Social Security Corporation of Jordan

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7 May 2008

09:00 – 10:30

**Improving Basic Social Protection for All: The Debate on the Basic Benefit Package and ILO Standard Setting**

Moderator: *Ms Nada Al-Nashif, Regional Director for Arab States, ILO Beirut*

- A Joint ILO/UN Presentation on the Basic Benefit Package  
*Mr Krzysztof Hagemeyer, Policy Coordinator, Social Security Department, ILO Geneva, and Ms Isabel Ortiz, Senior Interregional Advisor, Department for Economic and Social Affairs, United Nations, New York*
- Comments of Employers and Workers

General Discussion

10:30 – 11:00

Coffee Break

11:00 – 13:00

**Reforming Old-Age, Disability and Survivors' Protection**

Moderator: *Mr Krzysztof Hagemeyer, Policy Coordinator, Social Security Department, ILO Geneva*

- National Experiences from Middle East and North African Countries
  - Jordan  
*Ms Nadia Al Rawabdeh, Head of Pension Directorate, Social Security Corporation*
  - Kuwait  
*Mr Jassim Ali Hussein Ahmed Alkandari, Department for Assistance, Ministry of Social Affairs and Labour*
  - Morocco  
*Mr Abderrazak Talib, Department for Social Security and Solidarity, Ministère de l'Emploi et de la Formation Professionnelle*
  - Sudan  
*Ms Iman Ahmed Sid Ahmed Batory, Sudan Workers Trade Union Federation*
- Comments of Employers and Workers

General Discussion

13:00 – 14:30

Lunch Break

14:30 – 16:00

**Strategies for the Extension of Unemployment, Maternity and Health Care Benefits**

Moderator: *Mr Tharcisse Nkanagu, Coordinator for Africa, Social Security Department, ILO Geneva*

- National Experiences from Middle East and North African Countries
  - Bahrain  
*Ms Amal Al Matrook, Officer in Charge, Department of Employment and Training, Ministry of Labour*
  - Jordan  
*Ms Shireen Al Quda, International Cooperation Department, Social Security Corporation and Member of Maternity Insurance Committee*

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- Lebanon  
*Ms Firas Safwan, Adviser, Ministry of Labour, Lebanon*
  - Tunisia  
*Mr Mohamed Chaabane, General Director, Social Security Research Institute*
- Comments of Employers and Workers
- General Discussion
- 16:00 – 16:30 Coffee Break
- 16:30 – 18:00 **Strategies for the Extension of Social Insurance Benefits to Wider Groups of the Population**
- Moderator: *Ms Regina Amadi-Njoku, Director of the Regional Office for Africa, ILO Addis Ababa*
- National Experiences from Middle East and North African Countries
- Egypt  
*Mr Mohamed Talal Ali Ismaeel, First Undersecretary of State and Chairman of the Public and Private Sector Social Insurance Fund*
  - Oman  
*Mr Ahmed Al-Busaidi, Director of Planning, Public Authority for Social Insurance*
  - Syria  
*Mr Issa Kafa, Director of the Damascus Branch, General Social Security Corporation*
  - Yemen  
*Mr Awad Yahya Awad Al-Noami, Vice Chairman, Social Security Corporation*
- Comments of Employers and Workers
- General Discussion
- 19:00 **Reception hosted by H. E. the Minister of Labour of Jordan**
- Tripartite Consultations on the Conclusions**
- 8 May 2008**
- 09:00 – 10:30 **Strengthening the Governance of Social Security Systems**
- Moderator: *Ms Carmen Solorio, Coordinator for Latin America, Social Security Department, ILO Geneva*
- National Experiences from Middle East and North African Countries
- Saudi Arabia  
*Mr Fahad Howaimel, General Social Security Corporation*
  - Iraq  
*Mr Ali Al-Hamdi, Department of Pension and Social Security for Workers, Ministry of Labour and Social Affairs*
  - Palestine  
*Mr Majed Attah Ziab Helou, General Director, General Retirement Commission*
- Comments of Employers and Workers

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	General Discussion
10:30 – 11:00	<p><b>Building Capacity for Social Security</b></p> <p>Moderator: <i>Mr Khalid Mohammed Yassien, Director of the Arab Centre for Social Security, Khartoum</i></p> <ul style="list-style-type: none"> <li>■ ILO Training Programmes <i>Ms Lynn Villacorta, ILO International Training Centre, Turin</i></li> </ul> <p>General Discussion</p>
11:00 – 11:30	<p><b>International Standards in Social Security</b></p> <p>Moderator: <i>Ms Nadia Al Awamleh, Assistant Director for International Cooperation, Social Security Corporation, Jordan</i></p> <ul style="list-style-type: none"> <li>■ International Labour Standards in Social Security <i>Ms Ursula Kulke, Coordinator for Standards and Legal Services, Social Security Department, ILO Geneva</i></li> <li>■ Standards of the Arab Labour Organization and the Arab Strategy for Social Security <i>Mr Khalid Mohammed Yassien, Director of the Arab Centre for Social Security, Khartoum</i></li> </ul> <p>General Discussion</p>
11:30 – 12:00	Coffee Break/Tripartite Consultations on the Conclusions
12:00 – 13:00	<p><b>Conclusions: Orientation for Regional Action in Strengthening Social Security</b></p> <p>Moderator: <i>Ms Regina Amadi-Njoku, Director of the Regional Office for Africa, ILO Addis Ababa</i></p> <p><i>Mr Michael Cichon, Director, Social Security Department, ILO Geneva</i></p> <p><i>Mr Omar Razzaz, Director General, Social Security Corporation, Jordan</i></p> <p><i>H. E. Mr Ahmad Luqman, Arab Labour Organisation (ALO)</i></p>
13:00	<b>Farewell Lunch</b>

## List of participants

### Governments

<b>Bahrain</b>	<b>Ms Nabeela RAJAB</b> Officer-in-Charge/Department of Benefits and Compensation Ministry of Labour Phone: +973.17689936 Fax: +973.17684194 Email: nrajab67@hotmail.com	<b>السيدة نبيله رجب</b> قائمة بأعمال رئيس قسم الإستحقاقات والتعويضات وزارة العمل	<b>البحرين</b>
	<b>Ms Amal AL-MATROOK</b> Officer-in-Charge/Department of Employment and Training Ministry of Labour Phone: +973.17873708 Fax: +973.17684194 Email: amal.almatrook@mol.gov.bh	<b>السيدة أمل المتروك</b> قائمة بأعمال رئيس قسم متابعة التوظيف والتدريب وزارة العمل	
<b>Egypt</b>	<b>Mr Mohamed TALAT ALI ISMAEEL</b> First Undersecretary of State/ Head of the Public and Private Sector Social Insurance Fund, Ministry of Finance Phone: +202.25915121 Fax: +20225912453 Email:	<b>السيد محمد طلعت علي اسماعيل</b> وكيل أول/وزارة مالية ورئيس صندوق التأمين الإجتماعي للعاملين بقطاع الأعمال العام والخاص وزارة المالية	<b>مصر</b>
<b>Iraq</b>	<b>Mr Ali Falih Mezban AL-HAMDI</b> Consultant/Department of Pension and Social Security Ministry of Labour and Social Affairs Phone: +964.1.4257370 Fax: Email: lsoo_baghdad@yahoo.com	<b>السيد علي الحمدي</b> خبير/دائرة التقاعد والضمان الإجتماعي للعمال وزارة العمل والشؤون الإجتماعية	<b>العراق</b>
<b>Jordan</b>	<b>H. E. Mr Bassem SALEM</b> Minister of Labour Ministry of Labour Phone: +962.6.5802666 Fax: +962.6.5855216 Email: salembassem@yahoo.com	<b>السيد باسم السالم</b> وزير العمل وزارة العمل	<b>الاردن</b>

**Mr Hamada ABU NEJMEH**  
Acting Secretary-  
General/Director of Legal,  
International Cooperation and  
Information Department  
Ministry of Labour  
Phone: +962.6+58036666/156  
Fax: +962.6.5855216  
Email: nashat@mol.gov.jo

السيد حماده ابو نجمة  
الأمين العام بالوكالة/ مدير مديرية الشؤون  
القانونية والتعاون الدولي والإعلام  
وزارة العمل

**Ms Etaf HALASEH**  
Director of Women Workers Unit  
Ministry of Labour  
Phone: +962.6.5803666/102  
Fax: +962.6.5855216  
Email: nashat@mol.gov.jo

السيدة عتاف هلسة  
مدير وحدة المرأة العاملة  
وزارة العمل

**Dr. Omar RAZZAZ**  
Director-General  
Social Security Corporation  
Amman, Jordan  
Phone: +962.6.5501880  
Fax: +962. 6.5501901  
Email: orazzaz@ssc.gov.jo

الدكتور عمر الرزاز  
مدير عام  
المؤسسة العامة للضمان الاجتماعي

**Dr. Hazem RAHAHLEH**  
D.G. Advisor for Actuarial and  
Economic Studies  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: hrahahleh@ssc.gov.jo

الدكتور حازم رحاحلة  
مستشار المدير العام للدراسات الاقتصادية  
والاكتوارية  
المؤسسة العامة للضمان الاجتماعي

**Mr Fawzi HIASSAT**  
Director of Studies and  
Development Directorate  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: fhiassat@ssc.gov.jo

السيد فوزي حياصات  
مدير إدارة الدراسات والتطوير  
المؤسسة العامة للضمان الاجتماعي

**Mr Rafeek ZAKI**  
Director of Human Resources  
Directorate  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: 962 6 5501901  
Email: rzaki@ssc.gov.jo

السيد رفيع زكي  
مدير إدارة الموارد البشرية  
المؤسسة العامة للضمان الاجتماعي



**Ms Nadia RAWABDEH**  
Director of Pension Directorate  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: nrawabdeh@ssc.gov.jo

السيدة نادية الروابدة  
مدير إدارة التقاعد  
المؤسسة العامة للضمان الاجتماعي

**Mr Fayz AJARMEH**  
Acting Director of Collection &  
Legal Affairs Directorate  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: fajarmeh@ssc.gov.jo

السيد فايز العجارمة  
مدير مكلف بإدارة شؤون قضايا التحصيل  
المؤسسة العامة للضمان الاجتماعي

**Mr Mohammad AL ASHHAB**  
Director of South Amman Branch  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: malashhab@ssc.gov.jo

السيد محمد يسري الأشهب  
مدير إدارة فرع جنوب عمان  
المؤسسة العامة للضمان الاجتماعي

**Mr Mohammad AL ZOUBI**  
Director of East Amman Branch  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: malzoubi@ssc.gov.jo

السيد محمد شريف الزعبي  
مدير إدارة فرع شرق عمان  
المؤسسة العامة للضمان الاجتماعي

**Mr Daief Allah  
AL KHRIESHA**  
Director of Sahab Branch  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: dalkhriesha@ssc.gov.jo

السيد ضيف الله الخريشا  
مدير إدارة فرع سحاب  
المؤسسة العامة للضمان الاجتماعي

**Mr Hani ABU NAIEM**  
Director of Zarqa Branch  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: habunaiem@ssc.gov.jo

السيد هاني أبو نعيم  
مدير إدارة فرع الزرقاء  
المؤسسة العامة للضمان الاجتماعي

**Mr Ramzi DHABREH**  
Director of Aqaba Branch  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: intcoop@ssc.gov.jo

السيد رمزي دحابرة  
مدير إدارة فرع العقبة  
المؤسسة العامة للضمان الاجتماعي

**Mr Abdalhaleem AL HIARI**  
Head of Central Rights  
Settlement Committee / Youbeel  
Branch  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: aalhiari@ssc.gov.jo

السيد عبد الحليم الحيارى  
رئيس لجنة تسوية الحقوق الفرعية/ فرع  
اليوبيل  
المؤسسة العامة للضمان الاجتماعي

**Mr Sami ABU ABAS**  
Head of Central Rights  
Settlement Committee / Irbid  
Branch  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: sabuabas@ssc.gov.jo

السيد سامي أبو عباس  
رئيس لجنة تسوية الحقوق الفرعية/ فرع إربد  
المؤسسة العامة للضمان الاجتماعي

**Mr Mafaq RAWASHDEH**  
Clientele Advisor/ South Amman  
Branch  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: intcoop@ssc.gov.jo

السيد موفق الرواشدة  
مستشار جمهور/ فرع جنوب عمان  
المؤسسة العامة للضمان الاجتماعي

**Mr Jalal KHSAWNEH**  
Clientele Advisor/ Aqaba Branch  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: jkhsawneh@ssc.gov.jo

السيد جلال خصاونة  
مستشار جمهور / فرع العقبة  
المؤسسة العامة للضمان الاجتماعي

**Mr Yousef ABU QOUTA**  
Clientele Advisor/ South Amman  
Branch  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: yabugouta@ssc.gov.jo

السيد يوسف أبو قوطة  
مستشار جمهور / فرع جنوب عمان  
المؤسسة العامة للضمان الاجتماعي

**Mr Jamal OQULAT**  
Clientele Advisor/ Irbid Branch  
Social Security Corporation  
Amman, Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: joqulat@ssc.gov.jo

**السيد جمال العقلات**  
مستشار جمهور/ فرع أربد  
المؤسسة العامة للضمان الاجتماعي

**Mr Ali AL SHAWABKEH**  
Manager of Madaba Office  
Social Security Corporation  
Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: aalshawabkeh@ssc.gov.jo

**السيد علي الشوابكة**  
مدير مكتب مادبا  
المؤسسة العامة للضمان الاجتماعي  
الأردن

**Mr Taleb NAZZAL**  
Manager of Mafraq Branch  
Social Security Corporation  
Jordan  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: tnazzal@ssc.gov.jo

**السيد طالب نزال**  
مدير إدارة فرع المفرق  
المؤسسة العامة للضمان الاجتماعي  
الأردن

**Ms Shireen AL QUDAH**  
Head of International  
Cooperation Section.  
Social Security Corporation  
Phone: +962 6 5501880  
Fax: +962 6 5501901  
Email: salqudah@ssc.gov.jo

**السيدة شيرين القضاة**  
رئيس قسم التعاون الدولي  
المؤسسة العامة للضمان الاجتماعي

**Kuwait**

**Mr Jassim Ali Hussien Ahmed  
ALKANDARI**  
Chief / Employment Assistance  
Ministry of Social Affairs and  
Labour  
Phone: +965.9726266  
Fax: +965.2450763  
Email: Mq8117@hotmail.com

**السيد جاسم علي حسين أحمد محمد الكندري**  
رئيس قسم المساعدات  
وزارة الشؤون الإجتماعية والعمل

**الكويت**

**Mr Hamad ALELAIAN**  
Supervisor of Actuarial  
Department  
Republic Institution for Social  
Security  
Phone: +965.299.4356  
Fax: +965.2994351  
Email: hamadol@hotmail.com

**السيد حمد العليان**  
مراقب الإدارة الاكتوارية  
المؤسسة العامة للتأمينات الإجتماعية

	<p><b>Ms Basima ALKHATLAN</b> Social Insurance Researcher Republic Institution for Social Security Phone: +965.299.4356 Fax: +965.2994351 Email: taminat@pifss.gov.kw</p>	<p>السيدة باسمة الختلان باحثة تأمينية المؤسسة العامة للتأمينات الإجتماعية</p>	
<b>Lebanon</b>	<p><b>Mr Firas SAFWAN</b> Social Security Consultant Ministry of Labour Phone: +961.1.540127 Fax: +961.1.556817 Email: firas-safwan@hotmail.com</p>	<p>السيد فراس صفوان خبير لشؤون الضمان الإجتماعي وزارة العمل</p>	<b>لبنان</b>
<b>Morocco</b>	<p><b>Mr Abderrazak TALIB</b> Head of the Department for Social Security and Solidarity Ministère de l'Emploi et de la Formation professionnelle Phone: +212.37.774208 Fax: +212.37.774205 Email: talib_324_3@hotmail.com</p>	<p>السيد عبد الرزاق طالب رئيس قسم الضمان الإجتماعي والتعاقد وزارة التشغيل والتكوين المهني</p>	<b>المغرب</b>
<b>Oman</b>	<p><b>Mr Ahmed AL-BUSAIDI</b> Director of Planning Public Authority for Social Insurance Phone: +968.24524783 Fax: +968.24524797 Email: zbusaidy@hotmail.com</p>	<p>السيد أحمد البوسعيدي مدير التخطيط الهيئة العامة للتأمينات الإجتماعية</p>	<b>سلطنة عُمان</b>
<b>Palestine</b>	<p><b>Mr Majed Attah Ziab HELOU</b> General Director General Retirement Commission Phone: +970.2.2966045 Fax: +970.2.2961362 email: mn_2008@live.com</p>	<p>السيد ماجد عطا ذياب حلو مدير عام هيئة التقاعد العامة</p>	<b>فلسطين</b>
<b>Saudi Arabia</b>	<p><b>Mr Fahad HOWAIMEL</b> Assistant Governor General Social Security Corporation Phone: +966.1.4772870 Fax: +9661.1.2067899 Email: falhoaimel@gosi.gov.sa</p>	<p>السيد فهد هويمل مساعد محافظ المؤسسة العامة للتأمينات الإجتماعية المؤسسة العامة للتأمينات الإجتماعية</p>	<b>المملكة العربية السعودية</b>

<b>Syria</b>	<b>Mr Issa KAFA</b> Director of the Social Security Branch General Social Security Corporation Ministry of Social Affairs and Labour Phone: +963.11.2116574 Fax: +963.11.2123615 Email:	<b>السيد عيسى كفا</b> مدير فرع التأمينات الإجتماعية بدمشق المؤسسة العامة للتأمينات الإجتماعية وزارة الشؤون الإجتماعية والعمل	<b>سوريا</b>
<b>Tunis</b>	<b>Mr Mohamed CHAABANE</b> General Director Research and Studies Center /Social Security Center Phone: +216.71.844098 Fax: +216.71.842322 Email: mohamed.chaabane@cress.rnrt.tn	<b>السيد محمد شعبان</b> مدير عام مركز البحوث والدراسات في مجال الضمان الإجتماعي	<b>تونس</b>
<b>Yemen</b>	<b>Mr Awad Yahya Awad AL-NOAMI</b> Vice President of Social Security General Social Security Corporation Phone: +967.1.448861 Fax: +967.1.448870 Email: nmohammed307@y.net.ye or nm248@npc-ts.org	<b>السيد عوض يحي عوض النعمي</b> نائب رئيس التأمينات الإجتماعية المؤسسة العامة للتأمينات الإجتماعية	<b>اليمن</b>

## Employers

<b>Algeria</b>	<b>Ms Saida NEGHA</b> Vice-Presidente Confédération générale des entreprises algériennes Phone: +213.21.392145 Fax: +213.21.392146 Email: info@labo-saco.com	<b>السيدة سعيدة نغزة</b> نائبة الرئيس الكنفدرالية العامة للمؤسسات الجزائرية	<b>الجزائر</b>
<b>Bahrain</b>	<b>Mr Mohamed BADER MOHAMED</b> Director of Finance and Human Resources Bahrain Chamber of Commerce & Industry Phone: +973.17.217700 Fax: +973.17.227677 Email: mohdbader@bccci.bh	<b>السيد محمد بدر محمد</b> مدير ادارة المالية والموارد البشرية غرفة تجارة وصناعة البحرين	<b>البحرين</b>

<b>Egypt</b>	<b>Mr Mohamed EL SAYAAD</b> Federation of Egyptian Industries Phone: +202.42222032 Fax: +202.42229441 Email: Mohamed.elsaiad@elsaiad.com	<b>السيد محمد الصياد</b> اتحاد الصناعات المصرية	<b>مصر</b>
<b>Iraq</b>	<b>Mr Hussain Ali AHMMED</b> Vice-President General Federation for Iraqi Industries Tel: +964.7901.916488 Fax: Email: fed_ind_iraq@yahoo.com	<b>السيد حسين علي احمد</b> نائب رئيس الاتحاد العام للصناعات العراقية	<b>العراق</b>
<b>Jordan</b>	<b>Mr Mohamad Abed Al-Abdallat ABU ZAID</b> Fund Secretary/Member of the Board of Directors Jordan Chamber of Industry Phone: +962.6.4642649 Fax: +962.6.4643719 Email: abuzaid@nuqul.com.jo	<b>السيد محمد عبد العبدلات أبو زيد</b> امين صندوق/ عضو مجلس ادارة غرفة صناعة الأردن غرفة صناعة الأردن	<b>الاردن</b>
<b>Lebanon</b>	<b>Mr Hani ABOU JAOUDE</b> Representative of the Lebanese Industrialists at the Social Security Fund Association of Lebanese Industrialists Phone: +961.1.893713 Fax: +961.1.890285 Email: fml@inco.com.lb	<b>السيد هاني أبو جوده</b> ممثل الصناعيين في الصندوق الوطني للضمان الإجتماعي جمعية الصناعيين اللبنانيين	<b>لبنان</b>
<b>Oman</b>	<b>Mr Yousuf Yaqoub AL-BUSAIDY</b> Member of the Board of Directors Oman Chamber of Commerce & Industry Phone: +968.25449488 Fax: +968.25449442 Email: visionre@omantel.om	<b>السيد يوسف يعقوب البوسعيدي</b> عضو مجلس إدارة غرفة تجارة وصناعة عُمان	<b>سلطنة عُمان</b>
<b>Palestine</b>	<b>Mr Ali MUHANNA</b> Director of Small and Medium Enterprise Federation of Palestinian Chambers of Commerce, Industry & Agriculture/ Phone: +970.2.2345236/7 Fax: +970.2.2344924 Email: fpccia@palnet.com or ali-muhanna@palnet.com	<b>السيد علي مهنا</b> مدير دائرة تنمية المشاريع الصغيرة والمتوسطة إتحاد غرف التجارة والصناعة والزراعة	<b>فلسطين</b>

**Saudi  
Arabia**

**Mr Ahmed AL ISMAIL**  
Director General for Planning and  
Development  
Council of Saudi Chamber of  
Commerce & Industry  
Phone: +966.1.4053200  
Fax: +966.1.4091282  
Email:  
aismaeel@saudichambers.org.sa

السيد أحمد علي اسماعيل  
مدير عام التخطيط والتطوير  
مجلس الغرف التجارية الصناعية السعودية

المملكة العربية  
السعودية

**Mr Abdallah DAHLAN**  
ILO Governing Body Member  
Council of Saudi Chamber of  
Commerce and Industry  
Saudi Arabia  
Phone: +966.26063094  
Fax: +966.26066720

السيد عبدالله دحلان  
عضو مجلس ادارة في منظمة العمل الدولية  
مجلس الغرف التجارية الصناعية السعودية  
المملكة العربية السعودية

المملكة العربية  
السعودية

**Syria**

**Mr Ayman AL-MOULAWI**  
Secretary-General  
Damascus Chamber of Industry  
Phone: +963.11.224416  
Fax: +963.11.2245981  
Email: dci@mail.sy

السيد أيمن المولوي  
أمين سر  
غرفة صناعة دمشق وريفها

سوريا

**Mr Mohammed Faysal GHAZI**  
Member of the Board of Directors  
Damascus Chamber of Industry/  
Member of the Board of Directors  
of Social Security Corporation  
Phone: +963.11.2244106  
Fax: +963.11.2245981  
Email:

السيد محمد فيصل غازي  
عضو مجلس إدارة غرفة صناعة دمشق  
وريفها/عضو مجلس إدارة المؤسسة العامة  
للتأمينات الإجتماعية

**Tunisia**

**Mr Mohamed BEN NASR**  
Social Affairs and Labour  
Relations Officer  
Union tunisienne de l'Industrie, du  
Commerce  
Phone: +216.71.780366  
Fax: +216.71.795.214  
Email: m.bennasr@utica.org.tn

السيد محمد بن نصر  
متصرف الشؤون الإجتماعية والعلاقات  
التشغيلية الاتحاد التونسي للصناعة  
والتجارة

تونس

**Yemen**

**Mohamed AL-MAITAMI**  
Director-General  
Federation of Yemen Chambers of  
Commerce & Industry  
Phone: +967.1.514127  
Fax: +967.1.261269  
Email:  
malmitami2000@fycci.org

السيد محمد الميتمي  
مدير عام اتحاد الغرف التجارية الصناعية  
الاتحاد العام للغرف التجارية الصناعية

اليمن

## Workers

<b>Bahrain</b>	<b>Mr Maki ABBAS</b> Assistant Secretary-General for Social Security General Federation of Bahrain Trade Union Phone: +973.17727333 Fax: +973.17729599 Email: aalmekbas@gmail.com	السيد مكي عباس الأمين العام المساعد للحماية الإجتماعية الإتحاد العام لنقابات عمال البحرين	البحرين
<b>Egypt</b>	<b>Mr Mohamed Abd El-Rahman Ahmed EL-KWSNY</b> Legal Advisor General Federation for Trade Unions Phone: +202.25741374 Fax: +202.25753427 Email: etufegypt@hotmail.com	السيد محمد عبد الرحمن أحمد القويسني المستشار القانوني للإتحاد العام لنقابات عمال مصر الإتحاد العام لنقابات عمال مصر	مصر
<b>Jordan</b>	<b>Mr Jamil ISMAIL</b> Vice President General Federation of Jordanian Labour Unions Phone: +962.6.5675533/4 Fax: +962.6.5687911 Email: gfjtu@go.com.jo	السيد جميل إسماعيل نائب الرئيس الإتحاد العام لنقابات عمال الأردن	الأردن
<b>Kuwait</b>	<b>Mr Bejad ALOTAIBI</b> Secretary Economic and Social Affairs Kuwait General Trade Union Phone: +965.563.6389 Fax: +965.562.7159 Email: ktuf@hotmail.com	السيد بجاد العتيبي أمين الشؤون الاقتصادية والإجتماعية الإتحاد العام لعمال الكويت	الكويت
<b>Lebanon</b>	<b>Mr Fadlallah CHARIF</b> Labour relations, Media and Workers Education Secretary at the Executive Bureau of the Arab Trade Union in Lebanon General Confederation of Trade Unions Phone: +961.1.570800/1/2 Fax: +961.1.570800 or 961.5.463586 Email: info@cgtlb.org	السيد فضل الله شريف أمين شؤون علاقات العمل والإعلام والثقافة العمالية في هيئة مكتب المجلس التنفيذي للإتحاد العربي العام في لبنان الإتحاد العمالي العام	لبنان



<b>Morocco</b>	<b>Mr Mansour ABDESLAM</b> Administrative Committee Member Union générale des travailleurs du Maroc Phone: +212.22.549575 Fax: +212.22.309835 Email: abdeslam.mansour@lydec.co.ma	السيد منصور عبد السلام عضو اللجنة الإدارية للإتحاد المغربي للشغل في المغرب	المغرب
<b>Oman</b>	<b>Mr Mohammed Abdullah ALRASBI</b> Assistant Director for Revenue Improvement General Federation for Oman Trade Unions Phone: +968.24521860 Fax: +968.24510153 Email: alrasbi@oas.com.om or horizon0011@yahoo.com	السيد محمد بن عبدالله بن راشد الراسبي مساعد مدير تحسين الإيرادات الإتحاد العام لعمال سلطنة عُمان	سلطنة عُمان
<b>Palestine</b>	<b>Ms Amna RIMAWI MAFARJA</b> Member of the Under-Secretariat Palestinian Trade Union Federation Phone: +972.2.2965865 Fax: +972.2.2989684 Email: amnah@yahoo.com	السيدة آمنه ريماني مفارجه عضو الامانة العامة الإتحاد العام لنقابات عمال فلسطين	فلسطين
<b>Saudi Arabia</b>	<b>Mr Ahmed ALSALMAN</b> Board Member Workers' Committee Phone: +966.3.5859694 Fax: +966.3.5859690 Email: afsalman@stc.com.sa	السيد احمد السلطان عضو اللجنة العمالية اللجنة العمالية	المملكة العربية السعودية
<b>Sudan</b>	<b>Ms Iman Ahmed Sid Ahmed BATORY</b> Secretary of Social Affairs Sudan Workers Trade Union Federation Phone: +249.183.777463 Fax: +249.183.777947 Email: swtuf@swtuf.org	السيدة إمان أحمد سيد احمد باتوري أمينة الشؤون الإجتماعية بإتحاد نقابات عمال السودان إتحاد نقابات عمال السودان	السودان
<b>Syria</b>	<b>Mr Berhan ABDEL WAHAB</b> Secretary of Social Services General Federation of Trade Unions Phone: +963.11.3339900/1/2/3 Fax: +963.11.3320743 Email:	السيد برهان عبد الوهاب أمين الخدمات الإجتماعية الإتحاد العام لنقابات العمال	سوريا

**Tunisia**      **Mr Abdel Raouf AL-SHARIF**      السيد عبد الرؤوف الشريف      تونس  
Union générale tunisienne du      الإتحاد العام التونسي للشغل  
Travail  
Tunis, Tunisia  
Phone: +216.71.493082  
Fax: +216.71.399726  
Email: abderraouf.cherif@rns.tn

**Yemen**      **Mr Hussein Nasher Ali**      السيد حسين ناشر علي ناشر      اليمن  
**NASHER**      عضو المكتب التنفيذي للإتحاد العام لنقابات  
Member of the Executive      عمال اليمن/أمين الدائرة المالية والإدارية/  
Bureau/Secretary of the Finance      ممثل العمال في مجلس إدارة المؤسسة العامة  
and Management      للتأمينات الإجتماعية  
Department/Workers'      الإتحاد العام لنقابات عمال اليمن  
Representative in the Board of  
Directors of the General Social  
Security Corporation  
General Federation of Trade  
Union  
Phone: +967.1.200782 / 203751  
Fax: +967.1.203750  
Email:

## Observers

**ICATU**      **Mr Jamal AL SHAMASAT**      السيد جمال الشماسات      الإتحاد الدولي  
Assistant Under      الامين العام المساعد/اللجان المختصة      نقابات العمال العرب  
Secretary/Specialized Committee      وتشريعات العمل  
and Workers Legislations      دمشق، سوريا  
Damascus, Syria  
Phone: +963.11.4444974  
Fax: +963 440323  
Email: jksjks11@yahoo.com

**IOE**      **Mr Eric OECHSLIN**      السيد أريك أوثلن      منظمة أصحاب  
Adviser for Europe      منظمة أصحاب الأعمال الدولية      الأعمال الدولية  
International Organisation of      جنيف  
Employers  
Geneva, Switzerland  
Phone: +41 22 9290000  
Fax: +41 22 9290001  
Email: oechslin@ioe-emp.org

**ITUC**      **Mr Nezam QAHOUSH**      السيد نظام كاحوش      الإتحاد الدولي  
Coordinator      منسق      لنقابات العمال  
International Trade Union      الإتحاد الدولي لنقابات العمال  
Confederation - Jordan  
Tel: +962-6-5603181  
Fax: +962-6-5603185  
E-Mail: ituc-jor@wanadoo.jo

<b>ISSA</b>	<b>Ms Diana JREISAT</b> ISSA Liaison Officer for Arab Countries International Social Security Association Sub-regional Office for Arab Countries Tel. +962 6 550 19 77 Fax: +962 6 550 19 76 Email: asiassubregion@ssc.gov.jo	السيدة ديانا جريسات مديرة مكتب ارتباط الدول العربية الجمعية الدولية للضمان الاجتماعي	الجمعية الدولية للضمان الاجتماعي
<b>World Bank</b>	<b>Mr Gustavo DEMARCO</b> Senior Economist Human Development Department Middle East and North Africa Region Washington Phone: +1 202 458 0798 Fax: +1 202 676 0961 Email: gdemarco@worldbank.org	السيد غوستافو ديماركو إقتصادي أول قسم الموارد البشرية للشرق الأوسط وشمال أفريقيا واشنطن	البنك الدولي

## Resource persons

<b>Mr Andras UTHOFF</b> Officer in Charge, Division for Social Development Economic Commission for Latin America and the Caribbean Santiago de Chile Phone: +56.2.210.2268 Fax: +56.2.210.2523 Email: andras.uthoff@cepal.org	السيد أندراس أوتهورف القائم بالأعمال، قسم التنمية الاجتماعية اللجنة الاقتصادية لأميركا اللاتينية ومنطقة الكاريبي سانتياغو، تشيلي
<b>Mr Hyam MALLAT</b> Former Chairman of the Board of the National Social Security Fund of Lebanon Beirut, Lebanon Phone: +961 1 384713 Fax: +961 1 384 714 Email: mallatlaw@dm.net.lb	السيد هيام ملاط الرئيس السابق لمجلس الصندوق الوطني للضمان الاجتماعي في لبنان بيروت، لبنان
<b>Mr Danny PIETERS</b> Secretary-General of the European Institute of Social Security and Professor of Social Security Law. K. U. Leuven Leuven, Belgium Tel: +32.16.325422/400 Fax: +32.16.325419 Email: danny.pieters@law.kuleuven.be	السيد داني بيتوف الأمين العام للمعهد الأوروبي للضمان الاجتماعي بروكسل، بلجيكا

## Organizing institutions

<b>ALO</b>	<b>Mr Adnan ABU RAGHEB</b> Deputy Director-General Arab Labour Organisation Cairo, Egypt Phone: +202.33362719 Fax: +202.3362716 Email: alo@alolabor.org	السيد عدنان ابو راغب نائب المدير العام منظمة العمل الدولية القاهرة، مصر	منظمة العمل العربية
	<b>Mr Khalid Mohammed YASSIEN</b> Director of the Arab Center for Social Security Arab Labour Organization Khartoum, Sudan Phone: +249.183776710 Fax: +249.183744474 Email: arabcenter2005@hotmail.com	السيد خالد محمد ياسين مدير المركز العربي للتأمينات الاجتماعية منظمة العمل الدولية الخرطوم، السودان	
	<b>Mr Osama ISSA</b> Chief Insurance, Work Environment, Cooperation & Social Services Section Phone: +202.33362719 Fax: +202.33362716 Email: alo@alolabor.org	السيد أسامة عيسى رئيسة وحدة التأمينات وبيئة العمل ووحدة التعاونيات والخدمات الاجتماعية	
<b>ILO HQ</b>	<b>Mr Michael CICHON</b> Director Social Security Department International Labour Organization Geneva, Switzerland Phone: +4122.799.6630 Fax: +4122.799.7962 Email: cichon@ilo.org	السيد مايكل سيثون مدير قسم الضمان الاجتماعي منظمة العمل الدولية جنيف، سويسرا	منظمة العمل الدولية
	<b>Ms Ursula KULKE</b> Coordinator for Arab States and for Standards and Legal Services Social Security Department International Labour Organization Geneva, Switzerland Phone: +4122.799.7790 Fax: +4122.799.7962 Email: kulke@ilo.org	السيدة أورسولا كولك منسق المعايير والتشريعات، قسم الضمان الاجتماعي منظمة العمل الدولية جنيف، سويسرا	

**Mr Tharcisse NKANAGU**  
Coordinator for Africa  
Social Security Department  
International Labour Organization  
Geneva, Switzerland  
Phone: +4122.799.6736  
Fax: +4122.799.7962  
Email: nkanagu@ilo.org

السيد تارسيس نكاناغو  
منسق لشؤون منطقة أفريقيا، قسم الضمان  
الاجتماعي  
منظمة العمل الدولية  
جنيف، سويسرا

**Mr Krzysztof HAGEMER**  
Policy Coordinator,  
Social Security Department  
International Labour Organization  
Geneva, Switzerland  
Phone: +4122.799.7813  
Fax: +4122.799.7962  
Email: hagemer@ilo.org

السيد كريستوف هغيمير  
منسق أنظمة الضمان الاجتماعي  
قسم الضمان الاجتماعي  
منظمة العمل الدولية  
جنيف، سويسرا

**Ms Carmen SOLORIO**  
Coordinator for Latin America,  
Social Security Department  
International Labour Organization  
Geneva, Switzerland  
Phone: +4122.799.6637  
Fax: +4122.799.7962  
Email: solorio@ilo.org

السيدة كارمن سولوريو  
منسق لشؤون منطقة أميركا اللاتينية  
قسم الضمان الاجتماعي  
منظمة العمل الدولية  
جنيف، سويسرا

**ILO  
Regional  
Office for  
Africa**

**Ms Regina AMADI-NJOKU**  
Regional Director  
Regional Office for Africa  
International Labour Organization  
Addis Ababa, Ethiopia  
Phone: :+251 11 5517200  
Fax:  
Email: amadi\_njoku@ilo.org

السيدة رجينا أمادي-نجوكو  
المدير الإقليمي لأفريقيا  
منظمة العمل الدولية  
أديس أبابا

منظمة العمل  
الدولية/ المكتب  
الإقليمي لأفريقيا

**Mr Théopiste BUTARE**  
Social Security and Technical  
Specialist  
International Labour Organization  
Yaoundé, Cameroon  
Phone: +41 22 7997696  
Fax:  
Email: butare@ilo.org

السيد تيويبيسة بوتاري  
مستشار/ التأمينات الاجتماعية والشؤون  
التقنية  
منظمة العمل الدولية  
ياوندي، كاميرون

**ILO  
Regional  
Office for  
Arab  
States**

**Ms Nada AL-NASHIF**  
Regional Director  
Regional Office for Arab States  
International Labour Organization  
Beirut, Lebanon  
Phone: +961.1.752400  
Fax: +961.1.752405  
Email: al-nashif@ilo.org

السيدة ندى الناشف  
المدير الإقليمي  
المكتب الإقليمي للدول العربية  
منظمة العمل الدولية  
بيروت، لبنان

منظمة العمل  
الدولية/ المكتب  
الإقليمي للدول  
العربية

**Mr Hisham ABOU-JAOUDE**  
Senior Specialist for Employers'  
Activities  
Regional Office for Arab States  
International Labour Organization  
Beirut, Lebanon  
Phone: +961.1.752400  
Fax: +961.1.752406  
Email: aboujaoude@ilo.org

السيد هشام أبو جودة  
المستشار الإقليمي لشؤون أصحاب العمل  
المكتب الإقليمي للدول العربية  
منظمة العمل الدولية  
بيروت، لبنان

**Ms Christina BEHRENDT**  
Social Security Specialist  
Regional Office for Arab States  
Beirut, Lebanon  
Phone: +961.1.752400  
Fax: +961.1.752406  
Email: behrendt@ilo.org

السيدة كريستينا برينت  
المستشارة الإقليمية للتأمينات الاجتماعية  
المكتب الإقليمي للدول العربية  
منظمة العمل الدولية  
بيروت، لبنان

**Ms Najiyah MENASSA**  
Secretary  
Regional Office for Arab States  
International Labour Organization  
Beirut, Lebanon  
Phone: +961.1.752400  
Fax: +961.1.752406  
Email: menassa@ilo.org

الآنسة نجية منسى  
سكرتيرة  
المكتب الإقليمي للدول العربية  
منظمة العمل الدولية  
بيروت، لبنان

**Ms Niveen ABI GHANNAM**  
Research Assistant  
Regional Office for Arab States  
International Labour Organization  
Beirut, Lebanon  
Phone: +961.1.752400  
Fax: +961.1.752406  
Email:  
niveen.abi.ghannam@gmail.com

الآنسة نيفين أبي غنام  
باحثة مساعدة  
المكتب الإقليمي للدول العربية  
منظمة العمل الدولية  
بيروت، لبنان

**Ms Farrah HAWANA**  
Research Assistant  
Regional Office for Arab States  
International Labour Organization  
Beirut, Lebanon  
Phone: +961.1.752400  
Fax: +961.1.752406  
Email: farrah.hawana@gmail.com

الآنسة فرح هوانا  
باحثة مساعدة  
منظمة العمل الدولية  
المكتب الإقليمي للدول العربية  
بيروت، لبنان

**ILO ITC**

**Ms Lynn VILLACORTA**  
Senior Programme Officer, Social  
Protection Programme  
International Training Center of  
the ILO  
Turin, Italy  
Phone: +39.011.693.6790  
Fax: +39.011.693.6548  
Email: l.villacorta@itcilo.org

السيدة لين فيلاكورتا  
مسؤولة في قسم البرامج، برنامج الحماية  
الاجتماعية  
مركز منظمة العمل الدولية للتدريب المهني  
تورينو، إيطاليا

SSC

**Ms Nadia AL AWAMLEH**

Manager of International  
Cooperation Department  
Social Security Corporation  
Amman, Jordan

Phone: +962.6.5501880

Fax: +962.6.5501901

Email: nawamleh@ssc.gov.jo

السيدة نادية العواملة  
مدير مديرية التعاون الدولي  
المؤسسة العامة للضمان الاجتماعي

المؤسسة العامة  
للضمان  
الاجتماعي

**Ms Rana MUSLEH**

International Cooperation Officer  
Social Security Corporation  
Amman, Jordan

Phone: +962 6 5501880

Fax: +962 6 5501901

Email: rmsuleh@ssc.gov.jo

السيدة رنا مصلح  
مسؤولة التعاون الدولي  
المؤسسة العامة للضمان الاجتماعي

**Ms Haya ABU ZAID**

International Cooperation Officer  
Social Security Corporation  
Amman, Jordan

Phone: +962 6 5501880

Fax: +962 6 5501901

Email: habuzaid@ssc.gov.jo

السيدة هيا ابو زيد  
مسؤولة التعاون الدولي  
المؤسسة العامة للضمان الاجتماعي

**Mr Mohammad AL ANAKRIH**

International Cooperation Officer/  
Social Security Corporation  
Amman, Jordan

Phone: +962.6.5501880

Fax: +962. 6.5501901

Email: manakrih@ssc.gov.jo

السيد محمد العناقرة  
مسؤول التعاون الدولي  
المؤسسة العامة للضمان الاجتماعي

**Mr Jamal MASADEH**

Director of Media Department  
Social Security Corporation  
Amman, Jordan

Phone: +962.6.5501880

Fax: +962. 6.5501901

Email: jmasadeh@yahoo.com

السيد جمال مساعدة  
مدير مديرية الإعلام  
المؤسسة العامة للضمان الاجتماعي

**Mr Ali BALAWNEH**

**Director of Buildings and  
Services**

Amman, Jordan

Phone: +962.6.5501880

Fax: +962. 6.5501901

Email: intcoop@ssc.gov.jo

السيد علي البلاونة  
مدير مديرية المباني والخدمات  
المؤسسة العامة للضمان الاجتماعي







منظمة العمل العربية



الحكومة الأردنية



منظمة العمل الدولية

Inter-regional Tripartite Meeting on  
**The Future of Social Security in  
Arab States**  
6-8 May 2008, Amman, Jordan

الاجتماع الإقليمي الثلاثي حول  
مستقبل الضمان الاجتماعي في البلاد العربية  
عمان/ المملكة الأردنية الهاشمية، 6-8 أيار/مايو  
2008

Réunion tripartite interrégionale:  
**L'avenir de la sécurité sociale  
dans les pays arabes**  
6-8 mai 2008, Amman, Jordanie

## **The Future of Social Security in Arab States in the Middle East and North Africa**

*Background Note to the ILO address at the  
Inter-regional Tripartite Meeting on the Future of Social Security in Arab States  
Amman, Jordan, 6-8 May 2008*

**International Labour Office**  
Social Security Department, Geneva  
Regional Office for Arab States  
Regional Office for Africa  
May 2008

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## 1. Introduction: Social and economic policy background and the ILO mandate

The positive potential of globalization in terms of higher growth, higher levels of employment, higher standards of living and lower poverty, triggered inter alia through rapid technology transfers, fast pace of investment, global information access, as well as potentially enhanced fiscal space for social protection, will materialize only in politically and socially stable societies. Societies can only be stabilized if persistent and emerging social and decent work deficits in industrialized and developing countries are addressed effectively; these range from poor education and illiteracy with consequential social exclusion and gross productivity deficits, to unemployment, unmet health-care needs, health hazards in formal and informal workplaces, deep poverty, widespread inequality and finally to denied basic human and labour rights and lack of social dialogue. Such deficits create risks (insecurity, societal disintegration, environmental hazards, global health hazards, etc.) for sustainable economic and social development. Without social stability economic growth and development remain at risk.

Social stability rests on a variety of societal factors among which two are crucial:

- an adequate degree of security of decent employment for those who can work, and
- an adequate degree of effective social security for those who cannot or can no longer work.

In effect, people need to be confident – even in an economy dominated by global players – that their societies and governments can still provide an adequate level of economic and social security. In order to broaden and deepen confidence in the process of change set in motion by globalization, these twin objectives must be achieved:

- Effective social security means secure access to benefits and services that maintain and enhance an individual's employability and the guarantee of at least a minimum income level, including adequate and secure pensions when no longer active, together with basic social services (including health care);
- In general and in the long run, high levels of productive employment are necessary to finance social protection, as high employment levels substantially contribute to the creation of the tax base for social spending. Ultimately, social security systems can remain economically and financially viable only if they are successful in containing levels of dependency at socially adequate and economically responsible levels.

However, the case is made here that high levels of decent and productive employment can only be achieved in the long run if decent levels of social security are achieved in parallel. Change, for example, will be more easily accepted by employees and societies as a whole if the population is confident that governments and employers are seeking ways to facilitate the adaptation process in a socially responsible manner, using constructive social dialogue to build the necessary consensus for restructuring while providing the population with a basic floor of social security that helps to avoid excessive hardship for those that are affected by change. Social security systems also facilitate the distribution of benefits from growth and globalization to those most in need. They also help to create and maintain a productive workforce.

What is required is innovative combinations of government economic, employment and social policies. This Note focuses on the role of social security in that context. It also reports on a major shift in the international policy debate with respect to the role of social

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security in national development. Social security systems are increasingly seen as a crucial element in national economic and social development, and for the first time in decades major innovations originate from countries in Africa, Asia and Latin America. The understanding that the globalizing world needs a minimum basic benefit package for all is gaining ground.

The constitutional mandate of the ILO, as re-stated in 1944 in the Declaration of Philadelphia,<sup>1</sup> “recognises the...solemn obligation of the International Labour Organisation to further encourage among the nations of the world programmes that will achieve, inter alia, the extension of social security measures to provide a basic income to all in need of such protection and comprehensive medical care”.

The ILO constituents reaffirmed the fundamental role of the ILO in the promotion and extension of social security and its obligations in this respect at the International Labour Conference in 2001.<sup>2</sup> On this occasion, the Conference Committee on social security concluded that “highest priority should go to policies and initiatives which can bring social security to those who are not covered by existing systems”<sup>3</sup>. In this regard, it was proposed, among others, that a major campaign be launched in order to promote the extension of social security coverage.<sup>4</sup> Thus, in 2003, the Global Campaign on Social Security and Coverage for All was launched, with a view to: achieving concrete improvements in social security coverage in as many countries as possible; strengthening social partners and individuals’ know-how in the field of social security and developing useful tools for key actors; and placing social security at the top of the international policy agenda. The promotion of a social floor is rapidly becoming the policy nucleus of the campaign and of international debate.

But our vision of social security development does not stop at the basic floor. The floor is a platform for an “upward-moving escalator” providing more security when the fiscal space of the government increases — as economies continue to develop. These systems are helping women and men climb up the ladder of opportunity and securing them on their arduous way up.

## **2. Achieving decent work and decent lives for the global society: The role of social security**

The term social security – as used here – encompasses all measures that provide income security to people in case of poverty, unemployment, sickness, disability, old age, loss of the breadwinner, as well as access to essential social services. Such access to essential social services encompasses most importantly access to health services as well as access to education and occupational training and retraining. Social protection – including social security as defined above – is part and parcel of the ILO’s Decent Work Agenda. Social protection is also a productive factor that facilitates social and economic development. But before that case is made, some of the ethical foundations of social protection and the present political debate on the subject have to be revisited.

<sup>1</sup> Declaration concerning the aims and purposes of the International Labour Organization, adopted by the International Labour Conference at its 26th Session in Philadelphia on 10 May 1944.

<sup>2</sup> Resolution and Conclusions concerning social security, International Labour Conference, 89th Session, 2001, para. 2.

<sup>3</sup> Ibid., para. 5.

<sup>4</sup> Ibid., para. 17.

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This meeting on the future of social security in Arab States is organized within the framework of the Asian Decent Work Decade, which was launched in the Republic of Korea in September 2006, the African Decent Work Decade, launched in Addis Ababa in April 2007, and the ILO's Global Campaign to Extend Social Security to All. The Asian Decent Work Decade identified a set of priorities in realizing decent work in the countries of the region. One of the priorities is "extending the effectiveness and coverage of social protection for all, including workers in the informal economy."<sup>5</sup> The African Decent Work Decade commits African countries to adopting coherent national social security strategies which would also provide for the introduction or extension of a basic social security package.<sup>6</sup> Several Decent Work Country Programmes in the region, including Jordan, the Syrian Arab Republic and Yemen, have identified social security as one of the main priorities.

## 2.1. The moral challenge

Social security is a human right. Article 22 of the United Nations Universal Declaration of Human Rights states: "Everyone, as a member of society, has the right to social security". Almost sixty years later, that right remains a dream for 80 per cent of the global population. To many people a basic set of benefits could make the difference between a miserable and a decent life, or simply the difference between life and early death. Millions of children under the age of five die every year because they have no access to adequate health care and because there is not enough income to secure their food. According to ILO calculations,<sup>7</sup> less than 2 per cent of Global Product would be necessary to provide a basic set of social security benefits to all the world's poor. Providing a basic set of benefits to all who lack access to social security would require 6 per cent of Global Product. That potential investment in people amounts, for the two scenarios, to less than 10 per cent or 30 per cent respectively of the total annual global investment in tangible assets. The major share of the cost of a set of basic social security benefits stands to be financed out of national revenues, although in some countries international help might be needed to jump-start such systems.

## 2.2. Social impact and historical experience

Social security systems providing social transfers are instruments to alleviate and prevent poverty, which work directly and fast in a way that the putative benefits of "trickle-down" effects of economic growth cannot match. We know from long experience in OECD countries that social protection is a powerful tool to alleviate poverty and inequality: It reduces poverty and inequality in many OECD countries by almost 50 per cent.

There is no successful industrialized country in the world that does not have a fairly extensive social security system. There has been widespread consensus in most industrialized countries that the social protection of their population should be improved as societies grew more prosperous. Until recently and over many decades that principle was rightly never questioned. Many of those "traditionally" regarded as the most successful amongst the "developed" economies of the world, such as Denmark, France, Germany,

<sup>5</sup> Conclusions of the Fourteenth Asian Regional Meeting, Busan, 29 Aug. – 1 Sep. 2006, available at: <http://www.ilo.org/public/english/standards/relm/rgmeet/14asrm/conclusions.pdf>

<sup>6</sup> Conclusions of the Eleventh African Regional Meeting, Addis Ababa, 24-27 Apr. 2007, available at: <http://www.ilo.org/public/english/standards/relm/rgmeet/11afrm/conclusions.pdf>

<sup>7</sup> Presented in Cichon and Hagemejer (2007).

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Netherlands, Norway and Sweden, also have the highest social expenditure when measured as a percentage of GDP, generally between 25 and 35 per cent. These economies are also traditionally open economies and have been subject to international competition for decades before globalization became a topical issue. They also have in common the fact that they all started to introduce their social protection systems about a century ago – that is, when they were poor. Providing social security was and is part of their development paradigm.

There are positive examples of successes with modest universal social benefit systems in Africa, Latin America and Asia. In Botswana, Mauritius, Namibia and South Africa, for example, basic universal pensions have shown positive poverty alleviation effects. Valuable experience has been gained regarding the potential role of social transfers in combating poverty in countries such as Brazil and Mexico. Notable success in achieving full population coverage in health care could be observed across Asia during the last three decades. The Republic of Korea achieved full population coverage in a little over twenty years and Thailand in less than fifteen. Now major progress is being made in India and China. All experience shows that implementing basic social security systems in low-income countries can make an enormous contribution to achieving the first of the Millennium Development Goals (MDGs) – that of halving of poverty by 2015.

One may ask why is then the reduction or containment of social expenditure a predominant preoccupation of policy-makers in many countries the world over? Why does the stabilization of social security systems or the introduction of at least basic systems of social security not play a bigger role in economic and development policies? Why then do the majority of people in the world lack access to even basic social security? Why are many of those who provide advice to poor countries reluctant to support major transfer programmes? Why is there not enough support within the countries themselves? The answer lies in a fundamental and widespread misconception of the economic effects of social security.

### **2.3. Challenging conventional economic wisdom**

The answer to the above questions lies in a lack of understanding about the economic effects of social protection systems. In a tough competitive environment of global markets, every perceived detriment to national competitiveness is subject to intense scrutiny. Thus, social expenditure – at a level of between 25 and 35 per cent of GDP in industrialized countries and between 5 and 15 per cent of GDP in many developing countries – is often feared to be an unproductive expenditure. The national social security systems in industrialized countries came under political pressure following the two oil crises, when economic growth slowed down and fiscal space for income transfers in cash and in kind contracted or at least no longer expanded. The perceived need to contain social security expenditure became even more pronounced when globalization took off in full force at the beginning of the new millennium. The pressure to perform in a global competitive environment led to a one-sided view of social security as a cost to a society rather than a potential benefit and an investment in economies and people.

The international social protection policy debate has thus become a debate on fiscal and economic affordability. In the developed world it is a double-edged debate. On the one hand — on the revenue side — real or perceived global tax competition between countries and growing informality are perceived to limit the fiscal space for transfers, while on the other hand — on the expenditure side — population ageing and new health hazards lead to higher dependency levels and treatment costs, and are hence seen as inexorably driving expenditure levels higher. In the developing world the fiscal space debate is likewise a debate on economic and fiscal affordability but also implicitly an opportunity cost debate. It is argued that scarce public resources can better be invested elsewhere where they would

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create more economic growth, which would in the long run be more beneficial to the welfare of a population than allegedly “unproductive” transfer payments – largely to people working and living in informality.

In making the economic case for strong social transfer systems, the conventional economic wisdom with regard to the relationship between social protection and economic performance has to be challenged. The major elements of that conventional economic thinking are:

- (1) Social expenditure is perceived to be exclusively consumptive expenditure and does not have an investment character.
- (2) Economic growth is believed to reduce poverty automatically (often described as the “trickle-down effect”) and thus in an environment of growth the need for redistributive (social protection) policies may remain very limited.
- (3) There is a trade-off between social expenditure and economic efficiency or growth and hence high levels of redistribution are detrimental to growth.

Whereas, in our view:

**(1) *Social expenditure has an investment character***

Social security systems reduce poverty and are an investment in productivity. The World Bank stated in a recent report that poverty is a risk to security and lack of security is a hindrance to the investment climate.<sup>8</sup> Furthermore, only people who enjoy a minimum of material security can afford to take entrepreneurial risks.<sup>9</sup> Social security benefits (that do not establish disincentives to work) can facilitate the adjustment of labour markets in the industrialized and the developing world; they can thus help to facilitate public acceptance of global changes in production processes triggered by globalization. The existence of collective social security systems can help to maintain competitive wage levels as, in their absence, individuals would have to seek higher incomes to finance individual or private risk-coping mechanisms out of current incomes. Furthermore, only healthy and well-nourished people can be productive. Only people that have enjoyed at least a minimum level of schooling – facilitated by child and schooling benefits – can work their way out of poverty successfully. Many people would not be able to afford that level of schooling without family cash benefits.

**(2) *Economic growth alone does not automatically reduce poverty***

The empirical and statistical evidence of the last decade shows clearly that economic growth does not automatically reduce poverty without employment promotion and income redistributive mechanisms (such as social security systems) being put in place, otherwise countries with the same levels of GDP per capita would not experience a wide range of different levels of poverty and inequality. And one would not see persistently high levels of poverty in some countries with relatively high levels of GDP per capita.

<sup>8</sup> See World Bank (2005).

<sup>9</sup> See OECD (2006).

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**(3) *The famous trade-off between growth and equity does not hold true***

There is ample evidence that countries with identical levels of social spending experience a wide range of different levels of GDP, contradicting the hypothesis that there is an automatic negative correlation between economic performance and levels of redistribution. The latter implies that there is no hard and fast rule as to what countries can afford. There is, however, a fairly strong positive correlation between per hour productivity and per capita expenditure on social protection in OECD countries. Thus, superior economic performance and high social expenditure do coexist and social expenditure and economic performance support each other. The famous growth–equity trade-off is a myth rather than fact.

Obviously, at early stages of development the available financial and fiscal space is more limited than at later stages, so the introduction of social security benefits needs to be sequenced by order of priority. But we will show in the following sections that even among low-income countries most can afford some level of social protection.

At a later stage of development there may be a saturation point for social expenditure beyond which it becomes economically and socially counter-productive due to disincentives and crowding out of other public expenditure. That will depend on specific national circumstances and the specific design of the transfer systems and the affiliated incentives – for example, whether the system creates incentives for staying in or taking up work. Population ageing and the consequential reduction in the size of the labour force call for a close review of the incentives that need to be built into the systems to limit or reduce dependency levels without depriving those in need from necessary levels of protection.

However, a basic set of social protection benefits can only be promoted with credibility if it can be demonstrated that it is logistically feasible and affordable. Logistical feasibility can easily be demonstrated by examples of successful benefit delivery at reasonable administrative cost from Botswana, Brazil, Mexico, Namibia and South Africa. The critical question remains: Can developing countries afford a basic benefit package?

#### **2.4. Fiscal affordability of social security in a development context**

Fiscal space is always limited. Obviously, it is to be expected that in the early stages of development the constraint is tighter than at later stages, so the introduction of social security benefits may have to be sequenced by order of priority. However, ILO actuarial calculations have shown in the case of 12 developing countries that some form of basic social security can be afforded by virtually all countries. The following box describes that exercise in more detail. At the same time, countries need to invest in tax system design and the effectiveness of contribution collection mechanisms.



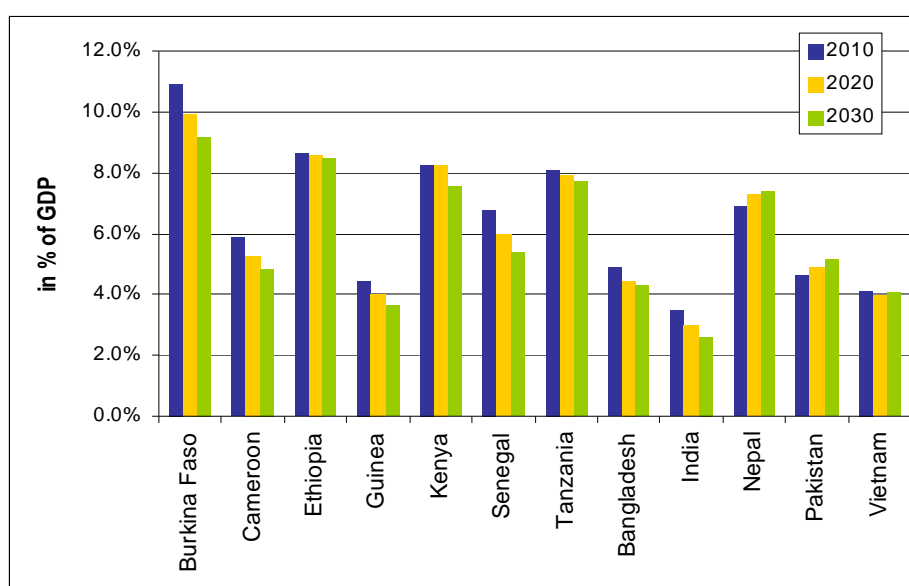
### Can developing countries afford to close the social security deficit?

A recent ILO modelling exercise has demonstrated that basic social protection benefits are not out of reach for low-income countries in sub-Saharan Africa and Asia, even though some of them might require some international assistance for a transitory period.<sup>1</sup> The study covered seven African countries (Burkina Faso, Cameroon, Ethiopia, Guinea, Kenya, Senegal, United Republic of Tanzania) and five Asian countries (Bangladesh, India, Nepal, Pakistan, Viet Nam). The cost of a basic social protection package was assessed, including a universal old-age and invalidity pension, universal access to basic health care and a universal child benefit. The main assumptions were:

- *Basic old age and invalidity pensions:*  
Benefit of 30 per cent of per capita GDP.
- *Child benefits:*  
Benefit of 15 per cent of per capita GDP for the first two children under age 14 in a household.
- *Social assistance:*  
100-day guaranteed employment at a wage of 30 per cent of per capita GDP for a maximum of 10 per cent of all people of active age.
- *Essential health care:*  
Annual *per capita* costs based on the benchmark professional staffing ratio of 300 persons per one health professional (approximately the staffing ratio of Namibia and Thailand).

The results of the projection show that a modest basic social protection package or at least substantial parts thereof would be affordable for low- and middle-income countries. Expenditure on the basic benefits package could be kept at around 7 per cent of GDP in Nepal and below 5 per cent of GDP in Bangladesh, India, Pakistan and Viet Nam. The results show a generally lower level of relative cost in Asia as compared with Africa; this largely reflects lower demographic dependency rates in the Asian countries.

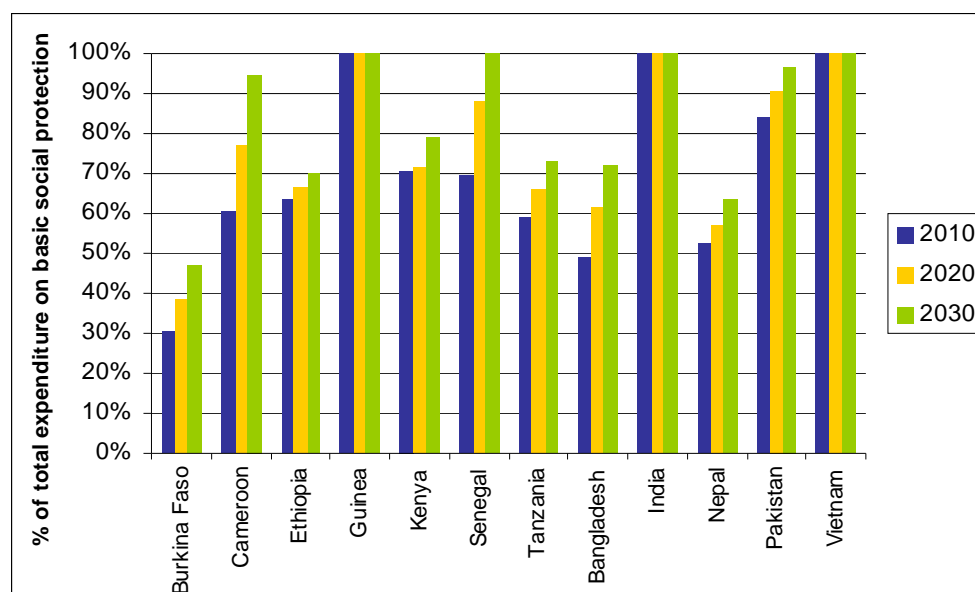
**Box figure 1. Projected expenditure on basic social protection benefit package for the selected countries in Africa and Asia, 2010–2030**



Source: ILO calculations.

If Asian countries, after some fiscal reforms, were able to use about 20 per cent of their revenues to finance the basic benefits package, full domestic financing for the complete benefit package would be possible in two out of those five countries. In the other countries the financing gaps during the next three decades might have to be closed through a gradual introduction of the benefit package, some budget support from international donors or the increase of the resource base for the national social budget. The latter could, for example, be achieved through the introduction of a health insurance system with wide population coverage.

**Box figure 2. Projected share of total cost of basic social protection package that can be covered by domestic resources equivalent to 20 per cent of government expenditure, selected countries in Africa and Asia, 2010–2030**



Source: ILO calculations.

<sup>1</sup> See Pal et al. (2005); Mizunoya et al. (2006); ILO (2008b).

The effects of a basic benefit package on poverty reduction could be quite dramatic. Our distributional analysis<sup>10</sup> shows that the combination of a modest cash benefit for children and a modest pension, which could be an entry level benefit package for poorer countries, could reduce the poverty head count by about 40 per cent – a major contribution to the achievement of MDG 1 in some African countries. This set of benefits is estimated to cost no more than about 4 per cent of GDP.

The above costing exercise uses a static (i.e., a simple “all other things being equal”) economic and fiscal model. It does not take into account the potential dynamic effects of a basic social protection package on the levels of national growth.

The case can well be made that the net costs of early investments into a basic set of social security benefits are zero or even negative, given expected offsets by positive economic returns. A small “back-of-the-envelope” calculation illustrates this. We know that the basic conditional cash transfer programme in Mexico, *Oportunidades*, reduces sickness days of adults by about 19 per cent, a major productivity push. The cash-for-education programme in Bangladesh (formerly food-for-education) has enabled children, in particular girls, to remain in school for several years longer than would otherwise be the case, and hence improved individuals’ employment prospects to a degree which should increase the lifetime earnings of beneficiaries by an amount estimated to reach 25 per cent — once again a case of social benefits driving a productivity jump.<sup>11</sup> If we assume, conservatively, that such productivity increases, linked to basic social security schemes, lead to a rise in overall levels of GDP by no more than 10 per cent, then modest schemes should quickly pay for themselves. In the long run — and after some investment in the tax collection

<sup>10</sup> See Gassmann and Behrendt (2006).

<sup>11</sup> See DfID (2005), pp. 13, 17.

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mechanisms – the resulting enhanced tax revenues would increase in line with growth, creating sufficient fiscal space, and more, to finance the benefits.

### 3. The case for early investment in social security

There seem to be good social reasons to introduce social protection mechanisms at an early stage of economic development and generally no good economic reasons why that should not be done. The historical experience in industrialized countries shows that social security is an investment in social and economic development.

The ILO regards its generic strategy for the extension of social security coverage as one of progressive universalism. That strategy is based on two distinct types of rights of the individual that give effect to the human right to social security. The strategy envisages:

- (1) **for those who derive rights on the basis of payments of contributions or taxes**, the building of progressively higher levels of protection for all or defined subgroups of the population, on the basis of societal consensus and the minimum levels of ILO Convention No. 102;
- (2) **residents' rights**, comprising a basic “floor” of social security for all that can be introduced and strengthened progressively in line with economic development:
  - by increasing the number of benefits;
  - by increasing the levels of benefits, and
  - underpinned by commitment to the objective of reaching the floor and reporting on the progress towards the objective.

The time seems right to promote a basic set of social protection benefits that should be achieved by all countries in the shortest possible time. This could be the social security minimum benefit package as part of a global socio-economic floor that was advocated by the World Commission on the Social Dimension of Globalization. The World Commission argues: “As long as countries – however poor – are able to collect some taxes and contributions, they can afford some level of social protection. A global commitment to deal with insecurity is critical to provide legitimacy to globalization.”<sup>12</sup>

Since about mid-2005, social security research in the ILO within the framework of the Global Campaign has focused on the affordability of minimum tax-financed cash benefits and the feasibility of pluralistic financing systems for health care.

Based on research undertaken in recent years and needs assessments carried out in the course of its technical cooperation activities, the ILO Social Security Department has identified a minimum set of four essential basic social security guarantees that could constitute a basic benefit package:

- All residents have access to basic/essential health-care benefits, where the State accepts the general responsibility for ensuring the adequacy of the delivery system and financing of the scheme.
- All children enjoy income security at least at the poverty level: through family/child benefits aimed to facilitate access to nutrition, education and care.

<sup>12</sup> See ILO (2004a), p. 110.

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- Some targeted income support for the poor and unemployed in active age groups.
  - All residents in old age and disability enjoy income security through pensions granted at least at the poverty line level.<sup>13</sup>

The Social Security Department also suggests that this minimum benefit package should constitute the social security part of the global socio-economic floor.<sup>14</sup> In essence the floor thus consists of a guaranteed set of basic social transfers in cash or in kind to all. It is formulated as a set of guarantees rather than a set of defined benefits. This leaves the option open to individual countries to realize these guarantees by way of means-tested, conditional or universal transfers. The most important fact is that everybody in a given society can access these essential transfers. While conceptually these are part of the country's social security architecture, in most countries the benefits provided would most likely have the character of social assistance rather than social security benefits. It is assumed here that the basic/low benefits are financed from general taxation. The transfers of the social floor being granted to all residents as residents' rights, their financing is generally a responsibility of the society as a whole.

Support is increasing for the policy position that countries can grow with equity, i.e., providing some form of social protection from some early stages of their development. The Director-General's report to the International Labour Conference of 2004 announced that the Office will further explore that suggestion and will explicitly test the financial feasibility and deliverability of basic non-contributory pensions, basic health services and access to basic education.<sup>15</sup> The United Kingdom-based initiative Grow Up Free From Poverty, a coalition of 21 leading NGOs, promotes a "social minimum"<sup>16</sup> benefit package consisting of a basic set of cash transfers, similar to the one listed by the ILO, as a crucial tool in the combat against poverty in developing countries. This position is fully endorsed by the recent White Paper on development policy of the Government of the United Kingdom.<sup>17</sup> The Governments of Belgium, France and Portugal have, for several years now, supported the extension of health security through a combination of community-based and central government approaches, through the framework of the ILO-STEP project. The Government of France launched a health insurance initiative for developing countries during the 2006 G8 meeting in St. Petersburg and is actively following up on this initiative. During its Presidency of the G8 in 2007, the Government of Germany provided continuity by adopting as focal topics health care in developing countries, the social dimension of social protection and the role of social protection.

What we observe is a real shift in development policy paradigms. The "grow first — distribute later" policies appear to be consigned to history. The Rt. Hon. Hilary Benn, then Secretary [Minister] for Overseas Development in the Government of the United Kingdom, described the new development policy with the statement: "Our agenda is about growth with equity, not either or."<sup>18</sup> We are witnessing a growing awareness of the potential value of social transfers in development policies, as was recognized at the G8

<sup>13</sup> ILO (2008a).

<sup>14</sup> ILO (2006), p. 34.

<sup>15</sup> ILO (2004b).

<sup>16</sup> See Grow Up Free From Poverty (2006).

<sup>17</sup> See DfID (2006), pp. 85-86.

<sup>18</sup> The full text of the speech is available at:  
<http://www.dfid.gov.uk/news/files/Speeches/wp2006-speeches/growth190106.asp>

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Labour Ministers meeting in Dresden<sup>19</sup> and in the Ministerial Declaration of the 2006 ECOSOC High-Level Segment that stated explicitly "...countries need to devise policies that enable them to pursue both economic efficiency and social security and develop systems of social protection with broader and effective coverage."<sup>20</sup> The ILO further developed the issue at an informal meeting of the Ministers of Labour and Social Affairs during the 2007 International Labour Conference where a possible new approach to a policy for balanced and inclusive growth was presented by the Office.<sup>21</sup>

However, this basic benefit package is only the "first floor" of the ILO's development paradigm for social security. On the basis of the floor for all, progressively better protection has to be built for increasing groups of people as the economies develop and fiscal space for redistributive and protective policies increases. The benefits of the second- and third-tier schemes are usually the result of rights acquired on the basis of payment of contributions or taxes and usually of a high level of income replacement.

The ILO has decided to take a pragmatic stance in the global social security reform debate and focus on its original mandate, i.e., safeguarding social outcomes, rather than argue about process and methods. This has a very clear consequence. The ILO does not have a specific reform model but it has a set of basic requirements of national social security systems. The ILO's mandate as determined by its Constitution and its Conventions and Recommendations, requires the Organization to promote the following ten basic principles:

- (1) **Universal coverage:** social security systems have to provide at least a minimum level of income protection and access to essential health care for all residents.
- (2) **Benefits as of rights:** benefits should be acquired as of exactly specified and predictable rights as a resident and/or as of right as a contributor.
- (3) **Protection against poverty:** the system should provide a reliable minimum benefit guarantee for all residents that effectively protects people against poverty.
- (4) **Income security:** benefit levels acquired by contributions should provide for reliable minimum levels of income replacement as stipulated in Convention No. 102.
- (5) **Actuarial equivalence of contributions and benefit levels:** a minimum replacement rate for all contributors in relation to the level of the contribution rate should be guaranteed.
- (6) **Guaranteed minimum rate of return on savings:** the real value of contributions paid into savings schemes should be protected.
- (7) **Gender fairness:** benefit provisions should be gender neutral and gender fair for working parents.
- (8) **Sound financing:** schemes should be financed in such a way as to avoid uncertainty about their long-term financial viability.

<sup>19</sup> See the G8 Labour and Employment Ministers Conference: Shaping the social dimensions of globalisation, Dresden, 6–8 May 2007, Chair's conclusions.

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

<sup>21</sup> The ILO tabled and presented a discussion paper entitled Growth, employment and social protection: A strategy for balanced growth in a global market economy.

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- (9) **Fiscal responsibility:** individual schemes should not crowd out the fiscal space for other social benefits in the context of limited overall national social budgets.
- (10) **State responsibility and good governance:** the State should remain the ultimate guarantor of access to adequate levels of social security, social partners should participate in the governance of social security.

The ILO has also embarked on a review of its social security standards with a view to exploring whether they provide sufficient guidance to countries with respect to the definition of a social floor. It appears from the present state of the analysis that a new binding or non-binding instrument defining a social floor could strengthen the ILO campaign.<sup>22</sup>

## 4. Towards comprehensive social security coverage in Arab States in the Middle East and North Africa: A policy agenda

Before developing a policy agenda for the region it is necessary to assess at national level the coverage gaps and the national and regional feasibility of building up a system of programmes that closes these gaps. The national strategies should not only be oriented only towards new programmes, but also to the reformulation, articulation and coordination of existing programmes.

### 4.1. Development of social security

The Arab countries in the Middle East and North Africa<sup>23</sup> have a long tradition of social and family solidarity that is reflected in their systems of government and social security arrangements. They are all members of the Arab League and, except for the Occupied Territories, of the ILO. In developing their social security and social insurance schemes they have attempted to follow the Conventions and Recommendations of the ILO and the Arab Labour Organization (ALO). In particular, the minimum standards and basic principles laid down in the Social Security (Minimum Standards) Convention, 1952 (No. 102), are reflected in most social security legislation throughout the Middle East and North Africa. A number of social security programmes have been established in the region since the 1950s. Algeria was one of the leaders in North Africa, setting up its retirement benefits programme in 1949, followed by Egypt in 1956, the Libyan Arab Jamahiriya in 1957, Morocco in 1959, Tunisia in 1960 and the Sudan in 1974. Social security programmes in the Middle East started in 1956 in Iraq, followed by the Syrian Arab Republic in 1959. By contrast, Oman started its programme only in 1991, as did Yemen, at the time of the country's reunification. Bahrain, Kuwait, Jordan, Lebanon and Saudi Arabia, for their part, set up their social security schemes in the intervening years.

Priority has generally been given to providing protection against the contingencies of invalidity, disability and employment injury. All the programmes are traditional defined-benefit social insurance programmes, with strong public involvement.

The current landscape of social security in the Middle East and North Africa, presented in Annex table 1, can be summarized as follows: Nearly all countries in the region provide

<sup>22</sup> ILO (2008a).

<sup>23</sup> The Arab States of the Middle East and North Africa will be referred to as one region throughout the present paper as their situation is analysed together.

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old-age, invalidity and survivor pensions for employees in the public and private sector and partly for other groups. While short-term benefits such as sickness and maternity cash benefits have been included in the social insurance schemes in the Maghreb, most other countries require employers to continue paying salaries to their employees during sickness and after childbirth.

Based on their long tradition of family and community solidarity, the countries in the region have established, besides formal social security systems, social assistance programmes and some kind of targeted cash or in-kind benefits programmes to support the poor. The present features of national social security systems in the Middle East and North Africa<sup>24</sup> are outlined in the tables of Annexes I and II.

## 4.2. Socio-economic background

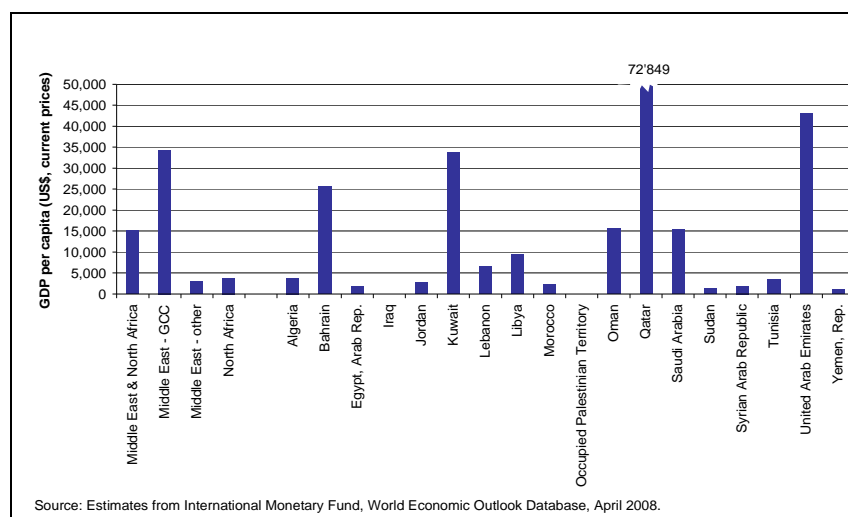
The Arab countries in the Middle East and North Africa have experienced considerable turmoil since the Second World War. Until the mid-1980s, some of them benefited from high growth rates largely based on oil price increases. Making use of oil revenues, governments increased investment in the social sectors and poverty remained lower than in other regions; the State increased its role in wage setting and created most of the employment; population growth was not a matter of concern. The collapse of oil prices in the mid-1980s led to declining income and low investment rates; it slowed or even halted growth in GDP and thus increased vulnerability, poverty and unemployment. The countries of the region also experienced a number of serious conflicts in the years that followed, which contributed to socio-economic instability. Towards the end of the 1990s, however, they started witnessing economic growth once again. Partly due to the recent rise in oil prices, some of them have been enjoying comfortable rates of growth in recent years. Between 2002 and 2006, average annual growth rates in some Gulf Cooperation Council (GCC) countries, Jordan and the Sudan exceeded 6 per cent, while the consequences of recent wars and political instability have had a negative effect on a number of economies in the region, namely Iraq, Lebanon and the Occupied Territories.

***Economic situation:*** GDP per capita in the region differs greatly between oil-producing and non-oil-producing countries. The two wealthiest countries in the Middle East are Qatar and Kuwait, with a per capita income exceeding that of many Western European countries, while Yemen is the poorest, with a per capita income roughly comparable to that of Zambia. In North Africa, the Libyan Arab Jamahiriya is the wealthiest country, followed by Tunisia, while the least wealthy country is the Sudan, with a per capita income comparable to that of Mongolia.

***Demographics:*** Average life expectancy at birth in all countries in the region is 70 years or higher, except for the two poorest countries, namely the Sudan (56.7) and Yemen (61.7). With an average of 3.1 children per woman, fertility rates in the region are substantially above replacement level; the highest fertility rate is observed in Yemen (5.9) and the lowest in Tunisia (2.0), followed by Lebanon (2.3), Kuwait and the United Arab Emirates (both 2.4).

<sup>24</sup> Due to a lack of reliable data, Iraq and the Occupied Territories cannot be fully represented in the following sections of the paper.

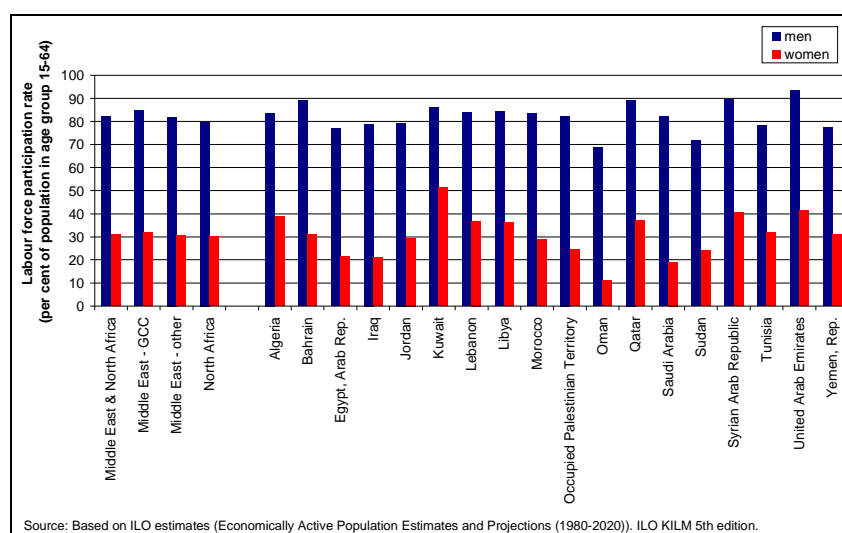
Figure 4.1. GDP per capita in the Middle East and North Africa, 2007



**Labour market:** Despite the rapid decline in population growth rates in most countries of the region, the momentum of past population growth has accelerated labour force growth. For the region as a whole, the rate of labour force growth rose from 2.4 per cent per annum during the 1960–1980 period to 3.3 per cent in 2006, which is high compared to other parts of the world. However, this growth was not matched by labour demand although many countries were experiencing high rates of economic growth. Despite substantial growth in private sector employment, new entrants into the labour force could not be fully absorbed. The Middle East and North Africa are currently the region with the highest average unemployment rates in the world.<sup>25</sup>

Female labour market participation in the region is growing rapidly: over the past ten years the proportion of economically active women increased from 26.7 to 30.9 per cent. However, there is still a substantial gap between participation rates of men and women compared to those observed in other regions (see figure 2).<sup>26</sup>

Figure 4.2. Labour force participation rates in the Middle East and North Africa, 15-64 age group, 2006



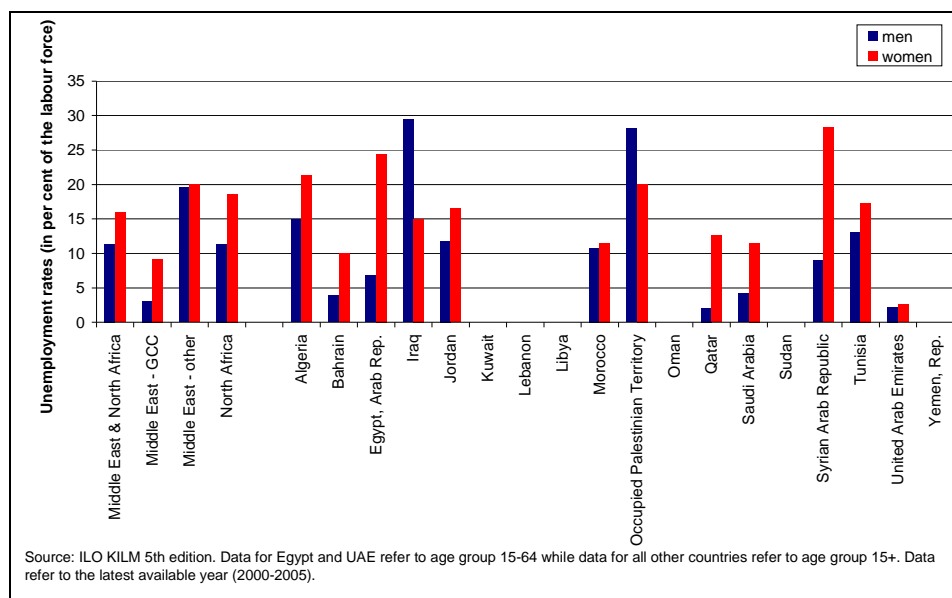
<sup>25</sup> See ILO (2008c).

<sup>26</sup> See ILO (2008d).



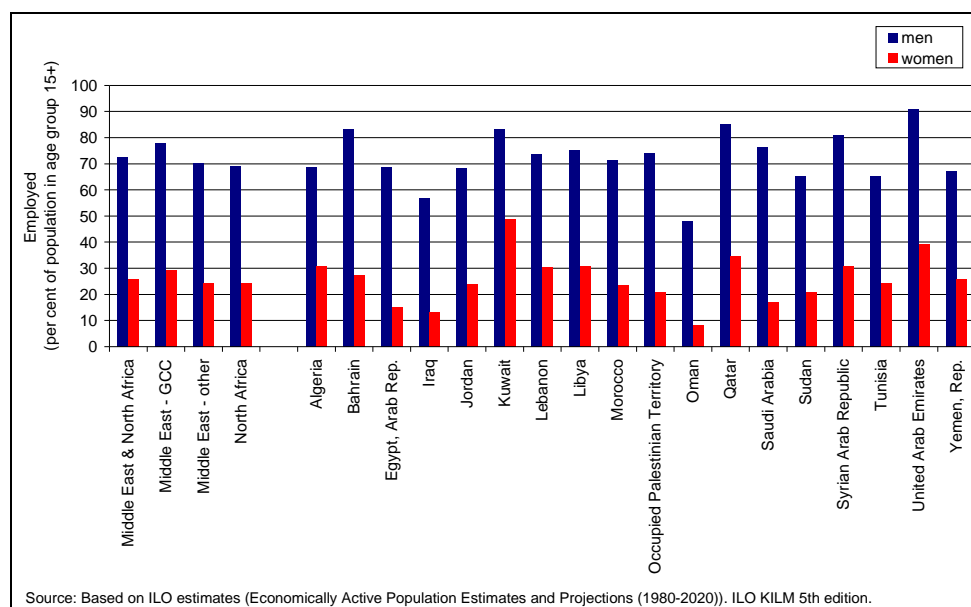
Unemployment rates in the region remain high, and female unemployment in some cases exceeds dramatically that among men (see figure 3). This means that despite their traditionally low labour market participation, women generally face more difficulties in finding employment than men.

**Figure 4.3. Unemployment rates in the Middle East and North Africa, latest available year**



While comparable unemployment statistics are not complete and are often out of date, employment–population ratios are more robust. Figure 4 shows the proportion of women and men in employment as a share of the total population aged 15 and over. There is considerable variation throughout the region. The highest employment rates for both men and women are found in the GCC countries.

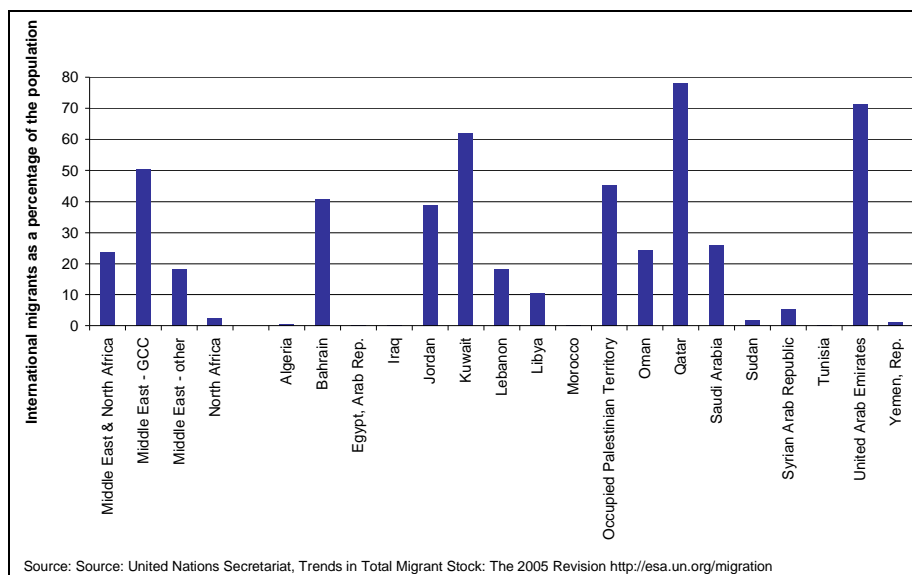
**Figure 4.4. Employment-to-population ratios in the Middle East and North Africa (estimate), 2006**



Migration is of substantial importance for some labour markets in the region (see figure 5). The GCC countries are those that receive most migrants, with an overall average proportion of migrants corresponding to around 50 per cent of the population: in Qatar and the United Arab Emirates (UAE) migrants make up over 70 per cent of the population,

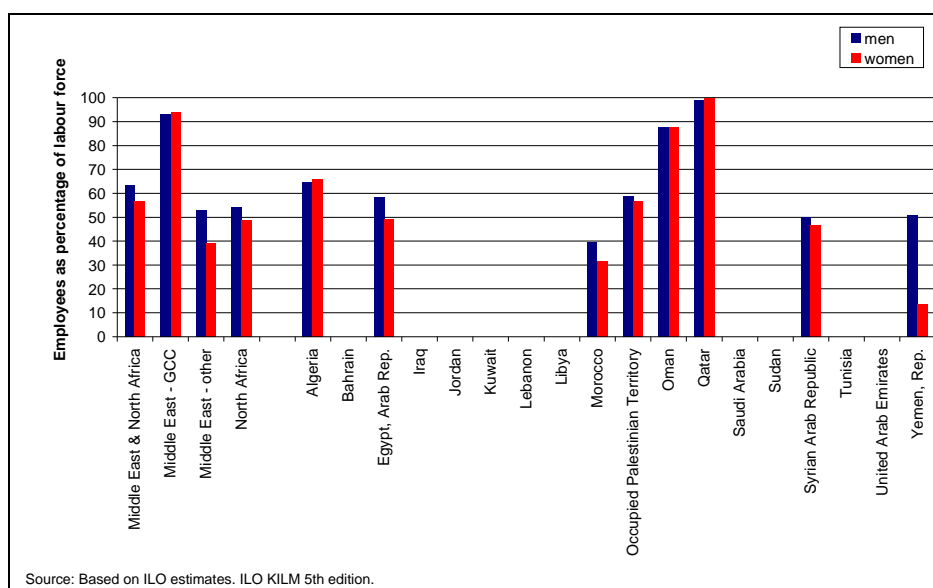
followed by Kuwait, Bahrain and Saudi Arabia. The other countries of the Middle East also have a significant share of migrants (almost 20 per cent of the population), while in Jordan the proportion reaches nearly 40 per cent. In contrast, in North Africa migrants account for less than 5 per cent of the population on average; the country receiving most migrants is the Libyan Arab Jamahiriya, where they represent around 10 per cent of the population.

**Figure 4.5. International migrants as a percentage of the population in Arab States**



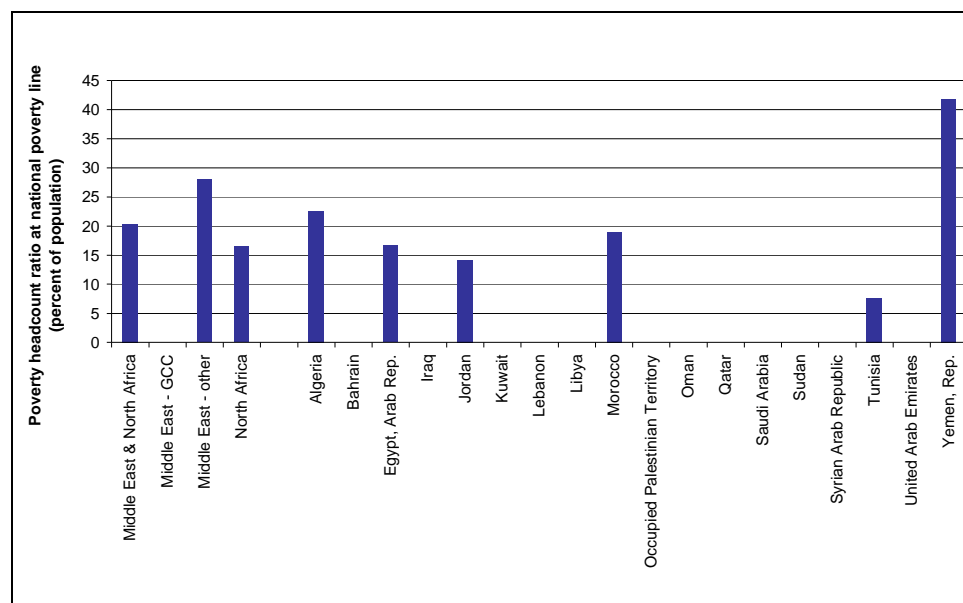
Informal employment has probably grown in most countries in the region during the last decades. Data are incomplete but, as shown in figure 6, the share of formal economy employees at the total labour force (which is here used as a proxy for formalization) hardly exceeds 60 per cent. However, there is a wide variation between the Gulf States on the one hand, where formalization reaches more than 90 per cent on average, and North Africa and the other Middle East countries on the other hand, with formalization rates of around 50 per cent. These data can also serve as proxies for the level and variation of formal social security coverage in the region.

**Figure 4.6. Employees (wage and salaried workers) as a proportion of the total labour force in Arab States, latest available year**



**Poverty:** Although economic performance has been relatively favourable in most of the region and poverty rates have been falling, poverty is still a problem in some countries. The poverty rate is highest in Yemen, where 42 per cent of the population live below the national poverty line, while in Algeria and Morocco it stands at 22 and 19 per cent respectively (see figure 7).

**Figure 4.7. Poverty headcount ratios in Arab States**



### 4.3. Policy challenges

#### 4.3.1. The coverage gap

**Formal social security schemes:** Formal economy workers in many of the countries in the region do not always enjoy comprehensive social security coverage. According to recent World Bank estimates, national social security pension schemes cover on average only about 34 per cent of the region's workers, the proportion ranging from 8 per cent in Yemen to 87 per cent in the Libyan Arab Jamahiriya.<sup>27</sup>

While the social security systems in North Africa (e.g., in Algeria and the Libyan Arab Jamahiriya) provide almost comprehensive protection in all nine branches of social security, most social security systems in the Middle East grant access only to invalidity, old-age and survivors' pensions, as well as benefits in case of employment injury. The majority of these schemes do not provide coverage in case of unemployment, sickness, maternity and for the maintenance of children, nor do they provide access to appropriate health-care benefits.

In order to remedy this coverage gap, some countries in the region, such as Bahrain and Jordan, have embarked on extending their social security schemes to cover additional benefits. To this end, Bahrain has recently set up an unemployment benefits scheme aimed at facilitating the return of the unemployed to the formal labour market. The scheme also covers first-time jobseekers, with incentives to take up formal employment. Jordan is in the process of extending its social security benefits to cover maternity and unemployment and

<sup>27</sup> Robalino (2005).

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is envisaging the introduction of health-care benefits in due course. These measures, among others, constitute an effort to prevent people from being forced into informality, to promote women's participation in the labour market and to ensure sustainable growth of employment in the formal economy.

In addition to the above limitations, several of these systems exclude from coverage employees working in small enterprises. As a result, considerable parts of the region's labour force are left out of any social security coverage. The Jordanian social security system, for example, in 2007 covered only around 50 per cent of the formal private sector workforce.<sup>28</sup> In order to provide comprehensive protection and remedy this coverage gap, the Jordanian Parliament is currently discussing extending the country's social security law to the branches of unemployment, health and maternity benefits and extending coverage to all enterprises with one or more employees, which would nearly double the number of persons covered. Some countries, including Yemen, have already extended social security to workers in small enterprises in recent years, but face some difficulties in enforcement.

Another remarkable example of extending social security coverage to a wider group of the population is Tunisia, which between 1987 and 2001 increased the membership in its social security system from about 900,000 to nearly 2 million people.

***Income support measures for the poor:*** While most of the countries in the region have achieved relatively good economic performance, economic growth has not fully translated into sufficient increase in quality employment. Low formal employment levels (outside of the Gulf States), low female labour market participation and high levels of youth unemployment remain the main causes for low coverage rates of formal social security schemes. This leaves a large portion of the population very vulnerable to social risks. As nearly all social security systems in the region are contribution financed and linked to formal employment, a high proportion of people lack any form of social security other than some basic social assistance. While the small proportion of women with stable employment careers in the public and private sector are relatively well protected, many women with short and interrupted formal employment careers have little or no social security coverage in their own right.

Some countries have set up cash transfer systems and social assistance programmes in order to grant at least some minimum benefits to the most vulnerable groups of the population. In Tunisia, the Ministry of Social Affairs set up the National Programme for Aid to Needy Families to provide direct cash transfers to the poorest households. In 2005 the programme benefited 115,000 families, most of which include elderly or disabled persons. The programme also grants, among others, the right to free care in hospitals. It covers 717,100 individuals in total, or 7 per cent of the population. According to surveys, however, coverage under the programme is not fully satisfactory and administration is complex, eligibility lists are rarely updated, and when they are, benefits are not always granted to those families newly identified as eligible.

Algeria has set up a public works and cash transfer programme which provides compensation to those able to work and financial support to those unable to work due to old age and invalidity. The programme shows deficiencies, however, as it covers only 20 per cent of the poor, while some people receive multiple benefits. In Morocco, there are a number of different programmes coordinated by an administrative body under the authority of the Ministry of Social Development and Social Solidarity in support of the poor. Overall, these programmes reach only 1.6 per cent of the poor due to inadequate coordination with other agencies and lack of administrative capacity.

<sup>28</sup> ILO calculation for 2007.

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Egypt has established a social assistance programme in the form of cash transfers. The impact of this programme is very moderate, however, as payments represent only 5 per cent of the amount of the absolute poverty line, while administrative costs are high. Jordan has set up two programmes of cash transfers to vulnerable segments of the society. One is targeted at the chronically unemployed poor on a case-by-case basis and covers only 45,000 households; the other is a cash transfer programme for the poor, disabled, widows and the elderly, which covers 3.6 per cent of the population. Both programmes have a limited impact due to extensive and burdensome administration. The Yemenite Social Welfare Fund provides small cash transfers to orphans, unsupported women and disabled persons and poor families without income. Although it has been expanded to cover close to a million people, the programme shows major deficiencies: unequal distribution, lack of transparency, low level of payments and a weak monitoring system. Similar cash transfer programmes have been established in other countries in the region, including Lebanon, Syrian Arab Republic and the GCC countries. A further important shortcoming besetting nearly all of these programmes is that they do not grant legal rights to adequate benefits but have been set up as ad hoc measures, depending on the amount allocated from government budgets and therefore subject to variations and cuts.

*Expatriate workers:* As noted above, the GCC countries are the major migrant receiving countries in the region, with an overall average proportion of migrants corresponding to approximately 50 per cent of the population. In the other countries of the Middle East migrants account for almost 20 per cent of the population, whereas in North African countries the proportion of migrants is relatively low, representing less than 5 per cent of the population on average. While in North Africa and in non-GCC countries in the Middle East regular migrant workers are covered by the relevant social security systems, in the GCC countries there is no such provision, apart from employment injury protection.<sup>29</sup> Thus a huge proportion of the population in these countries is left without any protection in case of old age, disability and death of the breadwinner. Some GCC countries are aware of the need to address this issue, however. One positive example in this regard is Bahrain, which has included protection of migrant workers in its new unemployment insurance scheme.

#### **4.3.2. The need for further reforms**

As mentioned earlier, most social security systems throughout the region were put in place in the 1950s and are thus now in the final decades of their maturation process. The time has come for careful design reforms.

Compared to other regions, national social security systems in the Middle East and North Africa enjoy extraordinary public and political support. Population coverage is higher than in all other developing regions of the world. Their conceptual and administrative basis also provides a solid starting point for the extension of social security coverage. However, the “white spots” that have been identified in population coverage as well as in benefit coverage indicate that there is a need for a systemic review of the overall architecture of the national social security system as a whole.

There is also mounting criticism with respect to the design and performance of individual components of the systems. In an extensive review of the pension systems in the Middle

<sup>29</sup> It is worth mentioning that at the onset of the schemes, migrant workers were protected in the same way as national workers, but were excluded after several years of the operation of the schemes.

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East and North Africa,<sup>30</sup> in 2005 the World Bank observed a number of systemic weaknesses. Specifically, the schemes:

- are overpromising benefit levels;
- are unsustainable due to design deficiencies (early retirement ages, inter alia);
- provide negative incentives for labour market participation, and
- have inefficient, costly and often fragmented administrations.

Even if that criticism cannot and should not be generalized, there are certainly reasons for performance reviews in many schemes. The favourable demographic situation still helps to stabilize the financial situation of most schemes even if longer term actuarial valuations already signal long-term financial problems. However, there is still time to enter into an intensive national dialogue to remedy the deficiencies of the existing systems.

## 5. A possible way forward

All countries in the region have well-established social security systems, based on insurance principles and defined benefit schemes, which cover the private and public sector workforce. However, these schemes show gaps regarding the range of benefits provided and the coverage of workers. Most of the countries in the region that receive substantial numbers of labour migrants do not include expatriate workers under the coverage of their pension schemes. In addition, although female labour market participation has significantly increased over the last decade, women's participation rate is still quite low and thus many women are left without any social security in their own right. Furthermore, labour force growth over the last decades has not always been accompanied by corresponding job creation. This has led to high unemployment rates, mainly among young people and women, with the consequence that unemployment has increased in many countries. In the absence of unemployment benefit schemes and comprehensive social assistance schemes in most countries of the region, large numbers of unemployed workers are left without protection. These deficits contribute to the expansion of the informal economy and consequently to increasing poverty.

Although most countries in the region have taken measures to provide assistance to the poor, social assistance programmes show significant gaps with respect to coverage, low benefit levels and burdensome and inefficient administration and thus do not constitute effective tools for poverty alleviation and income security.

As previously mentioned, several low- and middle-income countries worldwide have embarked on the establishment of innovative cash transfer systems. Some of these transfer schemes provide benefits that are conditional on welfare-enhancing behaviour such as schooling of children or undergoing a minimum set of medical check-ups during early childhood, etc. Others are simply universal benefits, for instance basic pensions that are paid to all residents over a certain age. Table 5.1 presents a classification of a selection (by no means complete) of significant new cash transfer schemes in countries at different levels of development. It is worth noting that Arab countries in the Middle East and North Africa are not among the countries that have introduced some form of cash transfer schemes seeking to reach either the total population or a specified group of the population, whether on a conditional or unconditional basis.

<sup>30</sup> See Robalino (2005).

**Table 5.1. Global prevalence of conditional and unconditional cash transfer programmes, 2008 and ongoing**

Type of cash transfers	Countries	Number
<b>Unconditional</b>		
Household income support	Chile, China, Indonesia (till 2007), Mozambique, Pakistan, Zambia	6
Social pensions	Argentina, Bangladesh, Bolivia, Brazil, Botswana, Chile, Costa Rica, India, Kiribati, Lesotho, Mauritius, Namibia, Nepal, Samoa, South Africa, Uruguay	16
Child/family benefits	Mozambique, South Africa	2
<b>Conditional</b>		
Cash for work	Argentina, Ethiopia, India, Republic of Korea, Malawi, South Africa	6
Cash for human development	Bangladesh, Brazil, Columbia, Ecuador, Indonesia, Honduras, Jamaica, Mexico, Nicaragua	9
Total number of countries with at least one programme		30
Of which Arab countries		0
Source: University of Sussex and ILO.		

There is a need to establish or improve targeted, coordinated and administered social assistance schemes following a rights-based approach. Such schemes could provide the basic set of social guarantees representing a basic benefit package.

At the same time, the protection provided under formal social security schemes needs to be progressively extended both in terms of the range of benefits and of personal coverage so that all workers in the formal economy have access to higher and more comprehensive social security benefits in line with ILO social security standards and their principles. The overall process should be organized in the form of extensive national dialogue including a complete social budgeting exercise that evaluates:

- a. the financial status of the existing schemes and their relative resource use within the overall national social expenditure envelope;
- b. their performance in respect of effectiveness and efficiency;
- c. the possible fiscal space for additional benefits,

and then – based on established facts – develops overall sectoral reform strategies. To pursue coverage for all based inter alia on the conclusions of the African Regional Meeting in April 2007, the ILO recommends to the countries in the Middle East and North Africa the following practical measures:

- (1) All countries in the region should develop, as part of their Decent Work country programmes where applicable, national social security development plans that determine a roadmap towards national social security systems that are compatible with social needs and available fiscal space, and that are conducive to economic performance, to consist in each case of:
  - a. a fully inclusive basic social security guarantee, representing a basic benefit package for all, even if implemented only gradually. Such a guarantee could consist of a combination of contributory and non-contributory programme elements, or of non-contributory programmes. The exact components of such a

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floor for each country level, and the sequencing for its introduction, remain a matter of national policy priorities;

- b. schemes providing higher levels of health protection and income security that complete the existing structures, once economic performance and fiscal space permit the financing of such benefits, and implemented through multi-pillar (including social insurance) schemes.
- (2) All countries should subscribe to a review system that allows them to self-monitor progress with respect to population coverage. Without such a self-binding mechanism progress might not be as rapid as it could be.

The ILO is well prepared to assist governments in establishing the basic benefit package and in extending the basic benefit package to more comprehensive social security benefits replacing former earnings and to improved medical care. In this regard, the ILO is able to provide technical advice and capacity building covering legal and managerial aspects, in addition to actuarial and social budget analyses. The latter should ensure that the progress made towards coverage is compatible with national economic and fiscal capacity and should help to facilitate donor support for the design and implementation of a social security floor as well as the development of sustainable and comprehensive social security schemes.



## Annex I

### Overview of national social security systems in Arab States

The following tables summarize the current state of social security in the Arab world. In view of the complexity of social security systems, an effort has been made to summarize the current situation in the best possible way. The tables reflect the current legislation as far as possible, yet it was not always possible to account for incomplete implementation of the regulations.

As the sources of information that could be used for this summary are not fully up to date and complete, the authors of this background note would very much welcome to obtain comments in case the information in the tables is not fully correct and complete.

**Table I.1. Overview of social security programmes in Arab States**

	Middle East												North Africa					
	Bahrain	Iraq	Jordan	Kuwait	Lebanon	Oman	Palestine	Qatar	Saudi Arabia	Syria	UAE	Yemen	Algeria	Egypt	Libya	Morocco	Sudan	Tunisia
Old age	SI	SI	SI	SI	OI	SI	..	..	SI	SI	..	SI	SI	SI	SI	SI	SI	SI
Survivors	SI	SI	SI	SI	..	SI	..	..	SI	SI	..	SI	SI	SI	SI	SI	SI	SI
Invalidity/disability	SI	SI	SI	SI	OI	SI	..	..	SI	SI	..	SI	SI	SI	SI	SI	SI	SI
Employment injury	SI	..	SI	SI	-a	SI	..	..	SI	SI	..	-	SI	SI	SIa	-a	SI	SI
Sickness	..	..	..	..	SI	..	..	..	-a	..	..	-	SI	SI	SI	SI	-	SI
Medical care	..	..	..	..	SI	..	..	..	..	..	..	-	SI	SI	SI	SI	-	SI
Maternity	-a	..	-a	..	..	..	..	..	-a	..	..	-a	SI	SI	-a	SI	-	SI
Unemployment	SI	-	-	-	-	-	-	-	-	-	-	-	SI	SI	-a	-	-	SN
Family	..	..	..	..	SI	..	..	..	..	..	..	EL	TF	..	..	SI	..	SI
Social assistance	SN	SN	SN	SN	SN	..	..	..	..	SN	..	SN	SN	SN	..	SN	..	SN

Notes : SI Social insurance  
 OI Other insurance arrangement (Prov. Fund etc.)  
 SSA Statutory social assistance (rights-based)  
 SN Safety-net type programmes (not rights-based)  
 TF Tax-financed programme  
 a Employer liability/employer-financed  
 .. sufficient information not available

Source: Based on US Social Security Department, Social security programs throughout the world, 2005–2006, and online information from national governments.

## Annex II

### Characteristics of national social security systems in the Arab States

Table II.1. Legal coverage for old age, disability and survivorship

	Public sector employees		Private sector employees							
	Civil servants	Others	Workers with 'regular' contracts	Workers in small enterprises	Agricultural workers	Casual workers	Domestic workers	Non-citizen workers	Self-employed/em ployer	Citizens abroad
Algeria	yes	yes <sup>a</sup>	yes	yes	yes	yes	yes	yes	yes <sup>c</sup>	..
Bahrain	yes	yes	yes	yes	partial	–	–	–	vol.	vol.
Egypt	yes	yes	yes	yes	yes <sup>c</sup>	yes <sup>c</sup>	yes <sup>c</sup>	yes <sup>c</sup>	vol. <sup>c</sup>	..
Iraq	..	..	..	..	..	..	..	..	..	..
Jordan	yes	yes <sup>a</sup>	yes	– <sup>e</sup>	– <sup>g</sup>	–	– <sup>g</sup>	yes	vol.	vol.
Kuwait	yes	yes	yes	yes	yes	..	..	no	vol.	..
Lebanon	yes <sup>d</sup>	yes <sup>b,d</sup>	yes	yes	yes	–	yes	partial	no	..
Libya	yes	yes <sup>a</sup>	yes	yes	yes	yes	yes	yes	yes	..
Morocco	yes	yes	yes	yes	yes	..	..	..	partial	..
Oman	yes	yes	yes	yes	–	–	–	–	–	vol.
Palestine	..	..	..	..	..	..	..	..	..	..
Qatar	..	..	..	..	..	..	..	..	..	..
Saudi Arabia	yes <sup>c</sup>	yes <sup>a</sup>	yes	yes	–	–	–	–	vol.	vol.
Sudan	yes	yes <sup>a</sup>	yes	yes	–	–	–	..	yes	..
Syria	yes <sup>c</sup>	yes <sup>a</sup>	yes	yes	yes	yes	yes	–	yes	vol.
Tunisia	yes <sup>c</sup>	yes	yes	yes	yes	yes	yes <sup>c</sup>	..	yes <sup>e</sup>	vol.
UAE	..	..	..	..	..	..	..	..	..	vol.
Yemen	yes	yes	yes	yes	–	–	–	yes	–	..

Notes:

<sup>a</sup> Special system for police and/or armed forces

<sup>b</sup> Special system for teachers

<sup>c</sup> Special system for this category of workers

<sup>d</sup> Special system for all public sector workers

<sup>e</sup> Excluded are workers in enterprises with less than 5 employees

<sup>f</sup> Excluded for foreign military, political or international missions

<sup>g</sup> Covered by law, but not yet applied in practice

– not covered

.. sufficient information unavailable

Source: Based on US Social Security Department, *Social security programs throughout the world, 2005–2006*, ISSA, Social Security Worldwide Database and online information from national governments.

**Table II.2. Statutory retirement ages in Arab States**

	Public sector scheme								Private sector scheme								
	Early retirement				Regular retirement				Early retirement				Regular retirement				
	Age		MMC		Age		MMC		Age		MMC		Age		MMC		
	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F	
Algeria										50	45	240	168	60 <sup>a</sup>	55	180	120
Bahrain										any	any	240	180	60	55	180	120
Egypt	any	any	240	240	60	60	180	180	any	any	240	240	60	60	120	120	
Iraq																	
Jordan										45	45	216	180	60	60	180	180
Kuwait	a	a	a	a	50	50	180	180	a	a	a	a	50	50	180	180	
Lebanon					60	60	240	240					60	60	240	240	
Libya					62 <sup>a</sup>	62 <sup>a</sup>	240	240					65	65	240	240	
Morocco										55	55			60	60		
Oman										45	45	240	180	60	55	180	120
Palestine																	
Qatar																	
Saudi Arabia	any	any	300	300	60 <sup>a</sup>	55	120	120	any	any	300	300	60 <sup>a</sup>	55	120	120	
Sudan										50	50	240	240	60	60	240	240
Syria										any	any	300	300	60 <sup>a</sup>	50 <sup>a</sup>	180	180
Tunisia	55	55			60	60			50	50	180 <sup>a</sup>	180 <sup>a</sup>	60	60	120	120	
United Arab Emirates																	
Yemen	50 <sup>c</sup>	46 <sup>c</sup>	300	240	60	55	180	120	50 <sup>c</sup>	46 <sup>c</sup>	300	240	60	55	180	180	

Notes: MMC = minimum months of contribution.

<sup>a</sup> Special provisions apply for certain groups of workers.

<sup>b</sup> 62 for civil servants, all other public service employees (except armed services) retire at 65. In general, workers in hazardous or unhealthy occupations retire at 60.

<sup>c</sup> Any age for men with 360 months of contribution, or any age for women with 300 months of contribution.

Source: U.S. Social Security Department (2005 and 2006): *Social Security Programs Throughout the World*, Washington D. C., ISSA: *Social Security Worldwide Database*; Robalino, D. et al. (2005). *Pensions in the Middle East and North Africa: Time for Change*. Washington D.C., World Bank.

Table II.3. Overview of social security and other relevant ILO Conventions ratified by Arab States

	Middle East										North Africa							Total number of ratifications (worldwide)	
	Bahrain	Iraq	Jordan	Kuwait	Lebanon	Occupied Territories	Oman	Qatar	Saudi Arabia	Syrian Arab Republic	UAE	Yemen	Algeria	Egypt	Libyan Arab Jamahiriya	Morocco	Sudan		Tunisia
<b>Up-to-date instruments</b>																			
C102 Social Security (Minimum Standards) Convention, 1952	-	-	-	-	-	..	-	-	-	-	-	-	-	-	1975	-	-	-	43
C118 Equality of Treatment (Social Security) Convention, 1962	-	-	1963	-	-	..	-	-	-	1963	-	-	-	1993	1975	-	-	1965	37
C121 Employment Injury Benefits Convention, 1964	-	-	-	-	-	..	-	-	-	-	-	-	-	-	1975	-	-	-	24
C128 Invalidity, Old-Age and Survivors' Benefits Convention, 1967	-	-	-	-	-	..	-	-	-	-	-	-	-	-	1975	-	-	-	16
C130 Medical Care and Sickness Benefits Convention, 1969	-	-	-	-	-	..	-	-	-	-	-	-	-	-	1975	-	-	-	16
C157 Maintenance of Social Security Rights Convention, 1982	-	-	-	-	-	..	-	-	-	-	-	-	-	-	-	-	-	-	3
C168 Employment Promotion and Protection against Unemployment Convention, 1988	-	-	-	-	-	..	-	-	-	-	-	-	-	-	-	-	-	-	7
C 183 Maternity Protection Convention, 2000	-	-	-	-	-	..	-	-	-	-	-	-	-	-	-	-	-	-	14
<b>Fundamental Human Rights Conventions</b>																			
C87 Freedom of Association and Protection of the Right to Organise Convention, 1948	-	-	-	1961	-	-	..	-	-	1960	-	1976	1962	1957	2000	-	-	1957	148

	Middle East										North Africa								Total number of ratifications (worldwide)
	Bahrain	Iraq	Jordan	Kuwait	Lebanon	Occupied Territories	Oman	Qatar	Saudi Arabia	Syrian Arab Republic	UAE	Yemen	Algeria	Egypt	Libyan Arab Jamahiriya	Morocco	Sudan	Tunisia	
C98 Right to Organise and Collective Bargaining Convention, 1949	-	1962	1968	2007	1977	-	..	-	-	1957	-	1969	1962	1954	1962	1957	1957	1957	158
C29 Forced Labour Convention, 1930	1981	1962	1966	1968	1977	1998	..	1998	1978	1960	1982	1969	1962	1955	1961	1957	1957	1962	172
C105 Abolition of Forced Labour Convention, 1957	1998	1959	1958	1961	1977	2005	..	2007	1978	1958	1997	1969	1969	1958	1961	1966	1970	1959	170
C100 Equal Remuneration Convention, 1951	-	1963	1966	-	1977	-	..	-	1978	1957	1997	1976	1962	1960	1962	1979	1970	1968	164
C111 Discrimination (Employment and Occupation) Convention, 1958	2000	1959	1963	1966	1977	-	..	1976	1978	1960	2001	1969	1969	1960	1961	1963	1970	1957	166
C138 Minimum Age Convention, 1973	-	1985	1998	1999	2003	2005	..	2006	-	2001	1998	2000	1984	1999	1975	2000	2002	1995	150
C182 Worst Forms of Child Labour Convention, 1999	2001	2001	2000	2000	2001	2001	..	2000	2001	2003	2001	2000	2001	2002	2000	2001	2003	2000	165

Source: Based on ILOLEX.



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