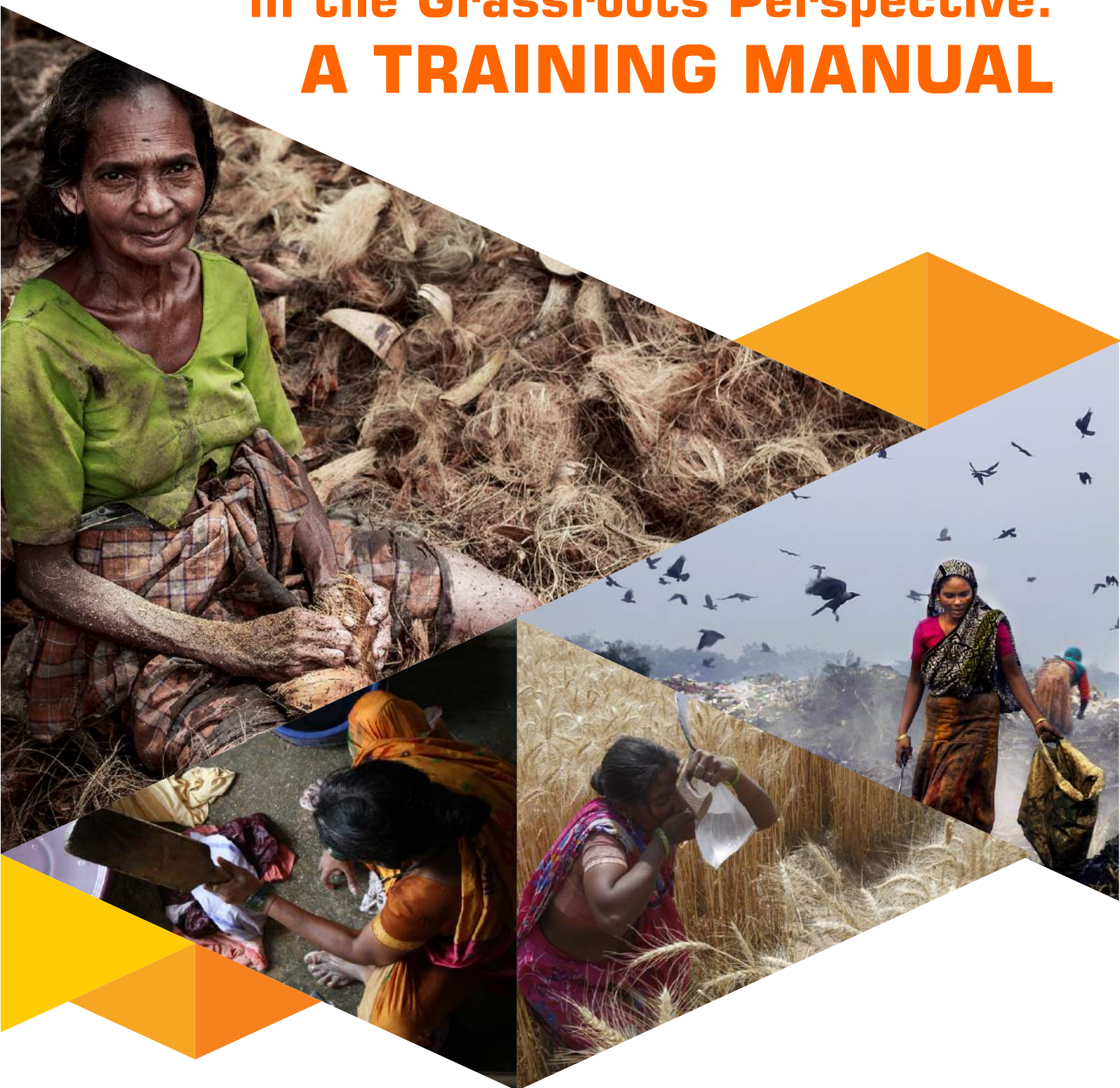


# Social Protection in the Grassroots Perspective: A TRAINING MANUAL



ASIA MONITOR RESOURCE CENTRE

**Social Protection in the Grassroots Perspective:  
A TRAINING MANUAL**

Joy Hernandez, Christal Chan, Samuel Li Shing Hong

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# Acknowledgement

This manual reflects the result of several trainings, workshops, and conversations in the past three years of grassroots organisers in Asia with whom Asia Monitor Resource Centre (AMRC) have worked together to learn how the grassroots workers understand the concept of social protection and evaluate the social protection programmes in their countries. More importantly, the participatory processes that served as the foundation of this manual helped in the formulation of a grassroots perspective on social protection as well as the grassroots workers' social protection demands.

In this regard, we owe special thanks to all the partners of AMRC and the members of the Asian Roundtable on Social Protection for contributing their valuable experiences and critical insights, perspectives, and analysis. We are particularly grateful to our friends in Cambodia where we piloted this manual – Oxfam Cambodia, Coalition of Cambodian Apparel Workers' Democratic Union, Cambodian Food and Service Workers Federation, Independent Democracy of Informal Association, Coalition of Cambodian Farmer Community, United Sisterhood, Community Legal Education Center, Action Aid Cambodia, Silika, and Youth Resource Development Program.

# Introduction

## 1. BACKGROUND

In most developed countries, systems of social welfare, social security, and social safety nets have been put in place by governments since the 19th and 20th centuries. These systems are usually a response to the increasing dissatisfaction of the workers who were affected by the crisis of those periods.

In 1948, social security was recognised as a basic human right by the United Nations Declaration on Human Rights (UDHR). Since then, the concept of social security has developed and expanded into the broader right to social protection.

However, for most grassroots workers in Asia, social protection is a relatively new concept. While some Asian countries already have social protection programmes in place, they are limited and narrow -- usually covering only a certain segment of the society and providing a limited kind of protection -- and fail to adapt to economic and social changes such as an aging population, increasing numbers of working poor, and worsening precarity of workers impacted by contractualisation and informalisation.

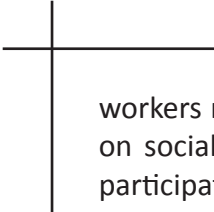
Most grassroots workers in the region do have first-hand experience in receiving some kind of social protection, although they may not recognise it as such. Instead of getting state-provided social protection, grassroots workers in Asia most likely obtain social protection through informal means, relying on their families, communities, or other informal networks for support during difficult times.

After the global financial crisis of 2008 shook the world's economy, social protection became more significant nationally and internationally. The increased interest in social protection is not entirely spurred by a genuine concern for the welfare of the people affected by the crises nor a growing recognition of social protection as a human right. Rather, it is because social protection programmes were somehow viewed as economic stabilisers that can save the economy from further decline. Thus, it is not surprising that international financial institutions (IFIs) like the World Bank (WB) and the Asian Development Bank (ADB), as well as organisations of rich countries like the G20 have been promoting different forms of social protection.

In line with this, the International Labour Organization (ILO) and other United Nations agencies encourage states to adopt social protection flows to ensure minimum social guarantees for their population. Meanwhile, at the end of 2015, the United Nations endorsed a set of sustainable development goals (the SDGs), which include the implementation of social protection systems as one of the targets to be achieved by 2030.

It seems that international institutions are instrumental in mainstreaming social protection as an issue out of genuine concern for the workers. However, past experiences show that social protection and other labour rights were, in fact, a result of workers' dissatisfaction, demands, and struggles. This is particularly true in the case of Germany's welfare state, the United States' New Deal, and even the Philippines' minimum wage and social security laws and Indonesia' social security programme.

The kind of social protection that international institutions prescribe are not necessarily what the



workers need. Thus, it is imperative for grassroots workers to develop their own understanding on social protection based on their experiences and struggles, articulate their demands, and participate in decision-making processes on issues that directly concern them.

The need for grassroots workers to be part of the social protection discourse

The grassroots workers constitute the majority of the society. Living in the margins, they are also the ones in the most vulnerable conditions. As such, they are usually the targets of different social protections programmes. Yet, they do not have a power to decide on the issues and programmes that affect their daily lives.

Following the principle of grassroots democracy, the Asia Monitor Resource Centre (AMRC) believes that it is not enough for the grassroots workers to simply understand the concept of social protection and learn the social protection programmes in various Asian countries. More importantly, the grassroots workers should also be able to formulate their own social protection demands and fight for them. The voice, needs, and interests of the grassroots workers should be reflected and addressed by social protection programmes.

In the previous workshops organised by AMRC in partnership with various labour organisations in the region, grassroots workers identified the lack of information about social protection as one of the major issues. Grassroots organisers also expressed that the concept of social protection is not easily conveyed to the workers. Hence, it is very important to develop educational materials and organise trainings to build the capacity of organisers in effectively facilitating a process of learning and understanding social protection.

While the concept of social protection can be quite complex, AMRC attempts to deliver the content of this training manual in a simple and straightforward way. The framework and content of this training manual are based on the trainings organised by the Asian Roundtable on Social Protection (AROSP) Network in 2015 and trainings conducted by AMRC in the past.

AMRC welcomes any comments and ideas on how this manual can be improved.



## OBJECTIVES OF THE TRAINING

AMRC developed this training manual to serve as an educational tool that the grassroots organisers can use to build up the workers' awareness on social protection and to assist them in formulating their own demands on social protection. It encourages grassroots workers to look beyond the traditional definitions of social protection by examining it in the context of the current oppressive economic and political structures. The manual can be used by various kinds of labour organisations, such as trade unions, labour NGOs and informal workers' groups.

## OBJECTIVES OF THE SOCIAL PROTECTION TRAINING

1. To help grassroots workers in developing their own understanding of social protection based on their own experiences, struggles, and needs.
2. To ensure that a gendered perspective is incorporated in the process of understanding social protection.
3. To facilitate grassroots workers in formulating their social protection demands.
4. To assist grassroots workers in developing strategies in organising and advocating for social protection.
5. In the long run, to build a new generation of workers who have the awareness and capacity to advocate and campaign for the kind of social protection that they want.

## OUTLINE OF THE TRAINING MANUAL

**This training manual contains seven parts.**

- 1. Introduction.** It explains the rationale for the development of this manual and the objectives of the training.
- 2. General guidelines for the conduct of the training.** It contains tips for facilitators in preparing and conducting the training.

**The training modules:**

- 3. Module 1** - The life of a worker. In this module, the participants will map the life of a worker and the difficulties and risks they confront at different stages in their lives.
- 4. Module 2** - Defining social protection for grassroots workers. Based on the individual analysis from the previous part, the participants will gain more understanding of social protection and the existing social protection policies and programmes in the country. This module will help them analyse the gaps in the social protection policies and programmes (i.e., in terms of implementation and their responsiveness to the workers' needs).
- 5. Module 3** - Organising for social protection. This module highlights the significance of organising for social protection in. Practically, it is aimed at helping the organisation and the workers in identifying priority issues to work on and developing an action plan for advocacy.



**6. Module 3** - The role of social protection in transforming the society. This module explores the transformative role of social protection in a capitalist society. The aim is to go beyond the surface of the existing social protection policies and programmes by critically analysing their relationship with broader economic policies and ideologies.

Additional materials and information:

**7. Annexes.** The annexes contain reading materials, useful information, and links to references that can be used as inputs to enhance the training.

## HOW TO USE THE MANUAL

### Planning the training schedule

Ideally, the social protection training can be structured as a two-day workshop for workers, with Modules 1 and 2 being covered on the first day and Modules 3 and 4 covered on the second day. Excluding breaks and lunchtime, the whole workshop will last around 10 hours.

The training can also be scheduled more flexibly according to the workers' availability or the organisation's programme of activities. For instance, it can run for more than two days (which may be consecutive or not) as long as the modules are covered in order (1, 2, 3, 4) as there is a logical progression to them.

### The format of the training

Each module is comprised of several activity sessions. Majority of the sessions are in the form of group discussions to encourage active involvement of the participants in the process. In some sessions, inputs by external resource persons may be necessary to trigger the discussions.

### Adapt it to your needs

This manual is just a guide. It can be adapted and tailored to the local contexts and cultures. It can also be adjusted so that the level of discussion is more suitable to the level of knowledge and understanding of the workers on the issue.

## 2. General guidelines for the conduct of the training

### Guiding principles in organising the training

Central to the process are the participants. As the training promotes grassroots-oriented social protection, the participants are considered active learners who does not only receive information passively but also share their own knowledge, experiences, and analysis on the issues that affect them. Thus, it is important to abide by some guiding principles that would ensure mutual learning and healthy discussions. These guiding principles should be observed during the preparations, the actual training, and the follow-up activities.

- **Participatory:** The whole process is designed to be largely driven by the participants. For this reason, the participants are free to provide their opinions and ideas in every session. Every participant to be encouraged to speak.

- **Inclusive:** Everyone should be included and respected, including workers from different backgrounds or with different opinions who want to join and engage in this training. Participants should also not be excluded from any discussion in the training.

- **Equal:** All participants in the training are equal, regardless their race, religion, sex, gender, age, sexual orientation, educational background, working position, etc. Gender equality is a very important element under this principle. The organisers of the training should ensure that the voices of women and men are equally heard, gender concerns are incorporated in the agenda of the training, and equal participation in the discussions are promoted. Women's concerns and opinions should be respected during the discussions.

- **Action-oriented:** The purpose of the training is not only to build the workers' understanding on social protection issues but also to encourage them to take actions on them. The learnings should be consolidated and some consensus on priorities and action plans should be built by the end of the meeting. Commitments to follow-up work should be made among the participants.

### BEFORE THE TRAINING

To ensure that the training will run smoothly and effectively, some preparation, planning, and groundwork are imperative. The following are some things that need to be done before the conduct of the training.

**1. Forming a team of facilitators.** The facilitators of the training play a crucial role as they are mainly tasked to ensure the participants' active involvement in the process, steer the direction of the training, and consolidate the results of the discussions. The organisers can form a team of facilitators

However, this role should not be strictly reserved for organisers and leaders of the organisation. The workers themselves are encouraged to become facilitators as this can help in building their confidence and leadership skills. Organisers should provide guidance and coaching to the workers who are willing to take on the facilitator's role.

Ideally, the facilitators should be involved in the preparatory work so that they will be well-informed of all the elements of the training -- the rationale and objectives, the content and

processes, the participants and logistics, and the expected output of the training.

**2. Identifying the participants.** The ideal number of participants for this training is around 15 to 20. Keeping the group small makes it easier to have deep and participatory discussions.

In identifying the participants, take note of their profiles (e.g., gender, age, work, participation in organisation activities, etc.) as they will help in improving the communication during the training.

Ensure gender balance and adequate representation from the group of grassroots people who are affected by the key issues that will be tackled in the training.

**3. Choosing the venue and setting the schedule.** In picking the location and time for the training, take into consideration the barriers that may limit the participation of women workers and other workers with special needs. If needed, provide childcare.

**4. Assessing the needs of the participants.** A needs assessment through a questionnaire may be conducted with the selected participants (see Annex for a sample questionnaire). It can aid in getting a better understanding of the participants' knowledge, awareness, and thoughts on social protection as well as their expectations from the training. The information gathered from the process can also help in modifying the training programme to better adapt to the needs and profiles of the participants.

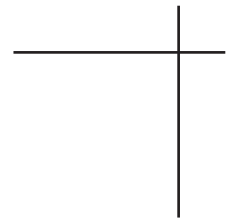
**5. Conducting a background research on the country's social protection system.** The manual was written to provide a general framework on how workers can define their own social protection. As this manual will be used in different countries, no in-depth country-specific information were included. Hence, it is useful for the training organisers to conduct a background research to map the existing social protection policies and programmes in their country. Examine their objectives, coverage, benefits, and gaps, among others.

**6. Reviewing the manual.** Taking into account the results of the needs assessment and the background research, determine whether amendments to the training process are needed.

**7. Inviting resource persons.** Resource persons may be invited to provide inputs in certain sessions (i.e., Session 4 - The economy and the labour force of the country, Session 5 - National social protection policies, and Session 8 - Review of the national social protection strategy). However, it should be noted that the key role of the resource persons is to provide valuable information on the subject without dominating the discussions.

**8. Assigning note-takers.** Taking notes is very critical considering that the training is primarily aimed at having a grassroots-defined social protection. Thus, the whole discussion, especially the arguments and cases raised by participants, should be duly noted. Documentation allows everyone to know what was discussed and what follow-up actions have to be taken in the future. In this regard, one or two persons can be assigned to be documentor/s. Alternatively, participants can take turns to take minutes.

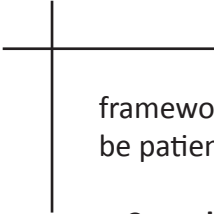
Documentation allows everyone to know what was discussed and what follow-up action to take.



## DURING THE TRAINING

The notes below basically outline the roles of the facilitators during the training.

- **Facilitating the introductions.** At the start of the workshop, some people may not know each other. Allocate time to give them a chance to introduce themselves and get to know each other. This will help them become comfortable and feel that they are part of a team. Play a game or do a short activity to 'break the ice.'
- **Explaining the agenda.** Explain why the training is being conducted, what the agenda is, how the items in the agenda are logically linked with each other, and what the outputs of the meeting will be. One hour can be spent for both the introductions and explaining the agenda.
- **Forming groups.** When forming small groups for discussions or activities, people tend to stick with people they know. It is important that participants get the chance to discuss and hear different points of view from different people. Mix the participants up using creative ways.
- **Making sure that everyone understands the discussions.** Always check whether everyone understands the instructions and the questions being asked. Sometimes, participants tend not to ask questions or raise clarifications when they do not understand certain points. Be aware of facial expressions that may indicate confusion or difficulty in understanding.
- **Keeping the sessions within the time limit.** This manual suggests the estimated time that needs to be allotted for each session. Yet, in the case of small group discussions, it is also good to consult the participants how much time they need. Manage time without sacrificing the quality of the discussions. Ensure that the discussions are not diverted into unrelated topics.
- **Encouraging dialogue while managing disagreements.** Encourage everyone to listen to others' stories, opinions, and views as well as to share their own. Usually, opinions may vary and disagreements may ensue. The role of facilitators is not to stop healthy arguments and take sides. Ensure that different points of view are expressed rationally without personal attacks by reminding participants to observe respect amidst diversity of opinions.
- **Balancing the discussions.** Make sure that the discussions are not dominated by few participants. Observe their participation and encourage those who have not been speaking to express their views. Building the confidence of the workers is an essential element in organising. People who have less power, such as the young and the women, tend to speak only after the men or the people in power have spoken. There are also people who are more likely to speak in small groups or only with the people whom they know. Be aware of these differences and try to overcome them by using creative and sensitive ways of facilitation (e.g., asking women and men to take turns in speaking).
- **Simplifying difficult questions.** Provide hints if the participants find it difficult to answer a question. Try to simplify complex question and provide examples. If the participants are still not able to give answers, skip them and come back to them the next time.
- **Providing broader analysis.** Some sessions in the training are more complicated, requiring broader analysis (i.e., the trends and development in the economy and society). The overall framework of this training on transformative social protection should be understood carefully so that all the concepts that will be raised during the process can be linked together to fit such



framework. The training is designed to gradually build the understanding of the participants, so be patient.

- **Consolidating discussions.** At the end of each session, try to consolidate the discussion and make a conclusion. Link the conclusion to the next session. Make sure that the conclusion is purely based on what have been discussed. Avoid imposing own views in the conclusion. Keep report back to a maximum of 15 minutes per session.
- **Energising.** Keep the interaction among the participants. Provide ice breaker activities, games, and (inoffensive) jokes from time to time so as to keep the participants energised.

## **AFTER THE TRAINING**

The training serves as a tool to raise the awareness and build the understanding of the workers on social protection. The end of the training marks the start of the real work. The results of the discussions can be consolidated to serve as inputs to possible campaigns, advocacy, and other initiatives on social protection. The issues raised by the workers during the training can be used as basis for organising workers and strategising advocacy and campaigns.

## MODULE 1: THE LIFE OF A WORKER

Most social protection policies are designed using a top-down approach without consultation with the workers and without a clear understanding of the realities faced by the workers on the ground. In this regard, this module aims to set the stage for discussion on social protection by laying out the needs and difficulties experienced by workers -- both men and women -- during their lifetimes.

This module takes 2 hours.

### **Session 1:** *Visioning a life of dignity for a worker*

This activity is intended as a warm-up exercise to help participants identify the essential elements that are needed for a worker to live a life of dignity.

**Objective of the session:** A leveling off exercise to identify the elements needed for a worker to live a life of dignity.

**Time:** 30 minutes

**Materials:** Flipchart paper and markers

#### **Method:**

1. The participants will be randomly split into 2 groups.
2. One group will discuss from the perspective of a woman while the other group will discuss from the perspective of a man.
3. Each group assigns a reporter for the report back.
4. Guide questions:
  - a. Imagine a happy worker with a dignified life in your country.
  - b. How would you describe her/him?
5. Write the elements that ensure a worker a life of dignity on a flipchart paper. Alternatively, you may draw the group's discussions on a flipchart paper. Be creative.
6. Each group reports back to the big group.

#### **Facilitators' notes, observations, and further questions:**

Do women and men have different visions for a life of dignity? Why?

Do people have different ideas of what are needed to have a dignified life depending on where they are from or what they do?

To conclude the session, the facilitator should draw out the fundamental elements of a dignified life.

## **Session 2: *The life of a worker: realities and difficulties***

In groups, the participants will identify the difficulties that workers face throughout different stages of their lives and to contrast the realities of a worker's situation with the result of the visioning exercise. This activity allows participants to identify the gaps that social protection measures should aim to address.

### **Objectives:**

- To identify difficulties and problems that workers encounter in different stages of their lives (introduction to life cycle approach)
- To compare and contrast the difficulties that male and female workers face
- To illustrate how the realities differ from the participants' imagination of a worker living a dignified life
- To provide an introduction to the role of social protection in bridging the identified gaps

**Time:** 45 minutes

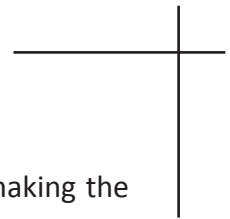
**Materials:** Flipchart paper and markers

### **Method:**

1. The participants split into groups of 4-5.
2. Half the groups are assigned to discuss from the perspective of a woman, and half from the perspective of a man.
3. Each group assigns a reporter for the report back.
4. Guide questions:
  - Map the different stages in the life of a male/female worker in your country.
  - What are the difficulties faced by workers in the different stages of their life?
  - How would you compare what the workers experience in reality and what you imagined as a dignified worker? How do you feel about this?
5. Write and draw the group's discussions on flipchart paper.
6. The groups report back to everyone.

### **Facilitators' notes, observations, and further questions:**

- Point out the differences between the difficulties faced by men and women. Do women and men have different difficulties at different stages of their lives? What are they? Why is it so? Link with biological reasons, gender roles, or unequal power (biological reasons as well as gender roles, unequal power at home and in society)
- Highlight the trends and observations that can be gleaned from the participants' responses.



These may include the following:

- The unequal distribution of wealth and power persists in the society, resulting in making the rich become richer and the poor more vulnerable.
- Poverty is transferred from one generation to the next. Intergenerational poverty continues due to a number of reasons. One of them is the government inadequate and unresponsive poverty reduction programmes to adequately address the poor’s difficulties and vulnerabilities.
- Lifecycle difficulties are not solely determined by the normal course of life of an individual from birth to death. They are also caused by pro-elite economic policies that contribute to the difficulties of the poor and marginalised (e.g., unemployment or underemployment due to labour flexibilisation policies or economic crisis, loss of land rights due to economic land concessions, etc.).
- Some of the difficulties faced by the people are because of the kind of work that they do. Workers are exposed to different occupational hazards that make them sick. Some even die because of work.
- Conclude this session by pointing out that given the context observe, the role of social protection is to transform the life of difficulty to a life of dignity.

Note: Facilitators can help to organise the difficulties cited by participants into broader categories and keep this list in a visible place throughout the discussions on social protection.

The following is an example of an output of this session:

Difficulties		
<u>Child labour</u> <ul style="list-style-type: none"> <li>• Dropped out of school</li> <li>• Trafficking</li> <li>• Children in domestic work</li> <li>• Separated from family</li> </ul>	<u>Poor working conditions</u> <ul style="list-style-type: none"> <li>• Exploitation by factories</li> <li>• Loss of wages</li> <li>• Low wages</li> <li>• No weekend</li> <li>• Factory health issue</li> <li>• Disability because of work</li> </ul>	<u>Lack of support system for older persons</u> <ul style="list-style-type: none"> <li>• Lack of pension</li> <li>• No caretaker, no retirement homes</li> </ul>
<u>Lack of decent standard of living</u> <ul style="list-style-type: none"> <li>• Living conditions</li> <li>• Lack of access to basic services</li> <li>• Food insecurity</li> </ul>	<u>Loss of mode of production</u> <ul style="list-style-type: none"> <li>• Loss of property</li> <li>• No farmland</li> </ul>	<u>Unemployment</u> <ul style="list-style-type: none"> <li>• Job loss</li> <li>• Lack of job opportunities</li> </ul>
<u>Gender-based discrimination</u> <ul style="list-style-type: none"> <li>• Family discriminates against girl child: less access to education, no freedom , more housework, security of a girl child</li> <li>• Limited opportunity and ability to migrate for job and education</li> <li>• Gender-based wage gap</li> <li>• Limited women’s leadership and representation in organisation</li> <li>• Lack of decision-making power at household level (no power over expenses)</li> <li>• Family burden, childcare burden</li> <li>• Domestic violence, gender-based violence</li> <li>• Divorce</li> </ul>		
<u>Lack of support to undertake education</u> <ul style="list-style-type: none"> <li>• No education</li> <li>• Lack of vocational training</li> </ul>	<u>Poor health</u> <ul style="list-style-type: none"> <li>• Chronic illness</li> <li>• Healthcare</li> <li>• Alcohol and drug use</li> <li>• Limited access to health services for maternity, birth, baby and mother</li> </ul>	<u>Poverty</u> <ul style="list-style-type: none"> <li>• Debt bondage</li> <li>• Inability to pay rent</li> <li>• Lack of savings</li> </ul>



### Session 3: What are the causes of the workers' difficulties?

This session leads participants into a discussion of the root causes of the workers' difficulties. Examining the root causes of the difficulties is important to set the stage for the later discussions on whether the social protection strategy and policies in their countries are effective in addressing the structural problems in the society.

**Objective:** To identify the root causes of the workers' difficulties.

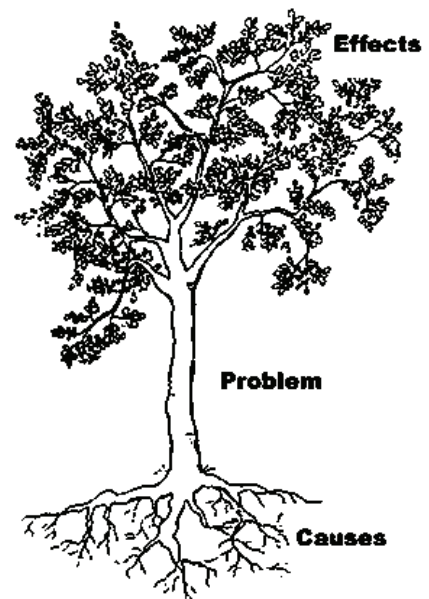
**Activity:** Problem Tree to identify the causes of workers difficulties

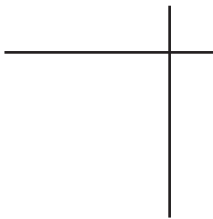
**Materials:** Flipchart paper, smaller pieces of paper, sticky tape, and markers

**Time:** 45 minutes

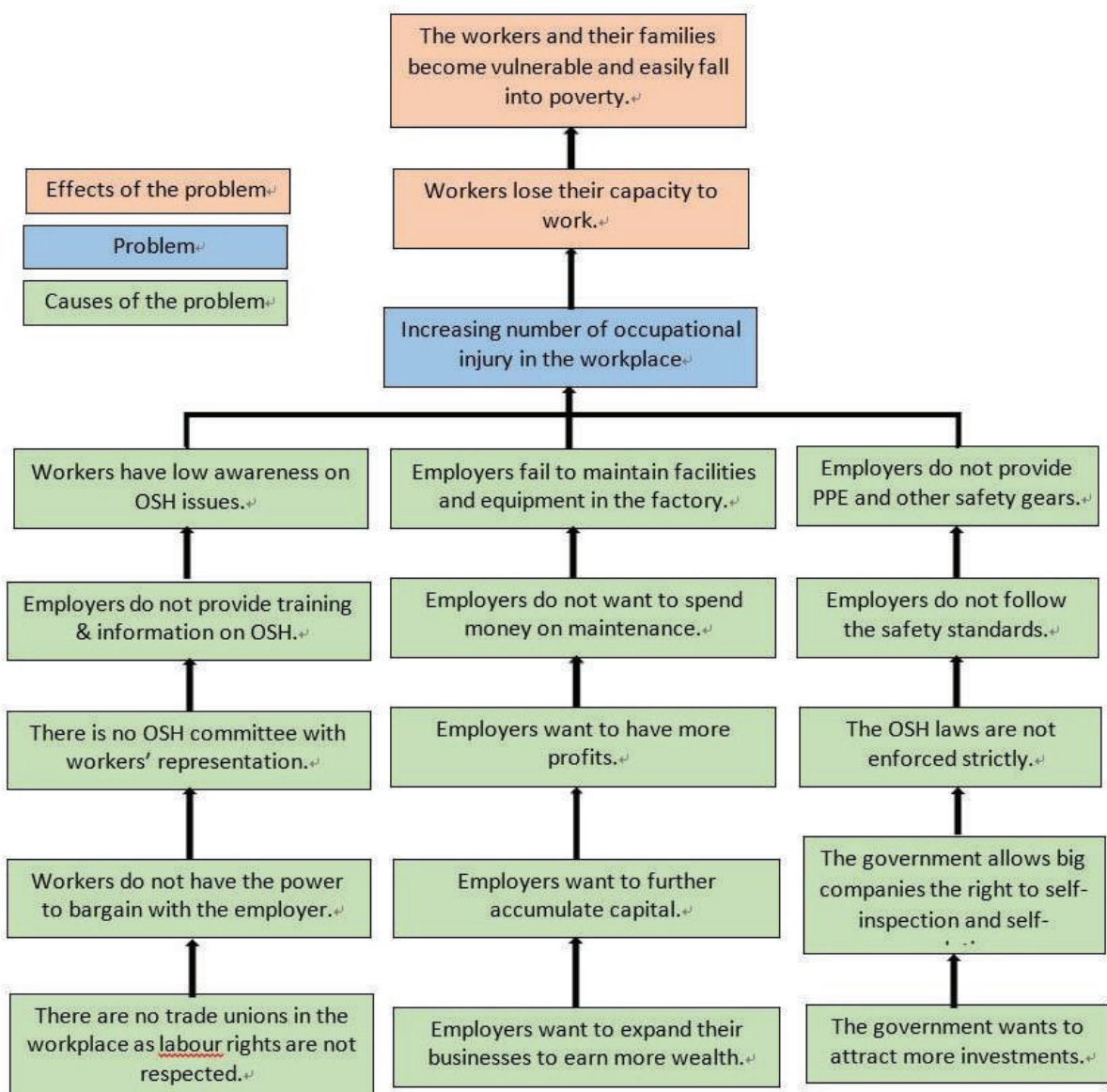
#### Method:

1. Participants divide themselves into groups of 4-5.
2. Each group will have an appointed facilitator, documenter, and reporter.
3. Each group will be assigned one subcategories of difficulties/problems based on the results of the previous exercise in Session 2. For example, one group may take up "lack of decent standard of living" and all the associated difficulties (poor living conditions, lack of access to basic services, etc) while another group may be assigned to discuss "poor health" and its associated difficulties (chronic illness, no healthcare, alcohol and drug use, limited access to health services for maternity, birth, baby and mother, etc). At least one group should be assigned a subcategory relating to "gender."
4. Ask the groups to draw a problem tree:
  - a. Draw the outline of a tree with the trunk, the branches, and the roots. Suggest to the participants to color code: blue markers for trunk, black for branches and red for roots.
  - b. On the trunk, place the problem. (Example: poor working conditions).
  - c. On the branches, place the effects of the problem (Examples: health problems, low income for family)
  - d. On the roots, place the reasons why the problem occurs (Examples of first-level causes: unorganised workers and lack of bargaining power).
  - e. For each first-level cause, ask the question, "Why does this occur?" and identify the reasons for that. Such reasons correspond to the second-level cause. In the example given, it could be the lack of respect for workers' rights despite recognition by law. Keep going until you are not able to find causes anymore.
5. Each group should present their problem tree back to the larger group.





An example of a problem tree:



**Notes to facilitators:**

- Based on the example given, explain that the prevailing ideology that perpetuates the problems and their causes is the pervasive neoliberal capitalism. We can say that it is the root of the problem.
- Ensure that the causes identified are at different levels. Avoid having participants jump from “poor working conditions” to “capitalism” as the root cause! Identify the root causes as progressively as possible.

## MODULE 2: DEFINING SOCIAL PROTECTION FOR GRASSROOTS WORKERS

### Session 4: *The national economy and labour force*

This session provides a background of the socio-economic conditions of the country and how the labour force fit in this context. Providing this background is important as it reminds participants to view their individual struggles from a broader perspective. This allows them to critically analyse the social protection strategies of their country. This session will take 2-2.5 hours.

#### Objectives:

- To build the participants' understanding on the current economic structure of their country
- To understand the national employment structure and labour conditions

#### Activity 1: Mapping exercise of the labour force

**Time:** 30 minutes

**Materials:** flipchart paper, markers

#### Method:

1. Participants will be divided into two groups. One group will identify the different kinds of workers in rural area of their country and the other group will identify the different kinds of workers in urban area of their country.
2. Each group assigns a reporter for the report back.
3. Guide questions:
  - a. What are the different kinds of workers in urban/rural areas of your country?
  - b. What industries/sectors do they work in? Which industries/sectors have the most number of workers?
  - c. In which sector(s) are the women workers concentrated?

#### Activity 2: Presentation on the macro picture of the economy and labour force of the country (plus Q&A) (Optional)

The resource person presents an overview of the country's economy and labour force distribution, in order to supplement and consolidate the information that was obtained in the previous activity. The information can also be introduced by the organisers of the training.

**Time:** 30 minutes

## **Session 5: *National social protection policies***

This session is intended to introduce participants to the social protection framework that exists in their country. The facilitator or a resource person would provide a brief background on the social protection system in the country.

### **Objectives:**

- To map out the existing social protection policies and programmes in the country
- To look deeply into the social protection policies and programmes in terms of their objectives, the beneficiaries they cover, how they are implemented, and how they are financed, among others.

**Time:** 30 minutes

**Materials:** Powerpoint presentation and/or handouts of the social protection matrix

**Method:** Presentation by facilitator or resource person

### **Guide questions for the resource person/facilitators:**

- What are the existing social protection policies and programmes in the country?
- What are the objectives of such policies and programmes?
- Who are the beneficiaries covered by the social protection programmes?
- What benefits are provided by the social protection programmes?
- How are they financed? Are they financed by workers' contributions, by taxes, by official development assistance (ODA), or by loans from international financial institutions? How are the funds used?
- Who administers the social protection programmes?

The resource person may also add other pertinent features of the programmes that may help the participants in getting a better knowledge and understanding about them.

## Session 6: Social protection policies: Do they protect the workers?

In this session, the participants will evaluate whether the social protection policies are adequate in addressing the lifecycle difficulties that they had identified in “Part 3: the life of a worker.” The activities in this session are intended to lead participants in identifying the gaps in the country’s social protection system and later, in articulating their demands for better social protection.

### Objective:

- To identify the problems and issues of the existing social protection programmes, based on the experiences of the workers
- To analyse the gaps between existing policies of social protection and the needs of workers

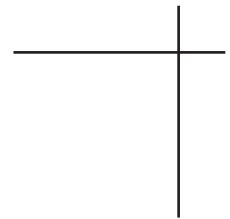
**Activity:** Gaps identification

**Time:** 30 minutes

**Materials needed:** Paper or notebooks

### Method:

1. Participants divide themselves into groups of 4-5.
2. The participants in each group will share and discuss their personal experiences relating to social protection. The following are some guide questions for discussion:
  - When you experienced difficulties in the past, did you try to access any social protection programme in your country?
  - If yes, how was your experience? Was the process easy or difficult? What kind of help did you receive?
  - If no, why not? How did you try to address your difficulty?
  - For women participants: When you had women-specific difficulties in the past (e.g., maternity, child care/education, etc.), have you tried to access any social protection programme? How was your experience?
  - After everyone shared their experience: What your thoughts after hearing what others shared?
3. The facilitator will then lead the discussion to the identification of gaps. Taking into account the inputs from the previous session, their experiences, and their observations, identify the gaps in the existing policies and group them in terms of the following:
  - **Coverage:** Who are being left out?
  - **Accessibility:** What are the barriers in accessing these schemes? Take into account a person’s gender, caste, social group, ethnicity, etc. Also take into account the requirements and process of accessing the programmes.
  - **Adequacy:** Are the benefits provided by the social protection scheme sufficient to address the difficulties and vulnerabilities that they are supposed to address?
  - **Gender responsiveness:** Do these schemes consider gender differences? Can women easily access these schemes?
4. The facilitator leads all the participants into a discussion on what each group has concluded through this exercise. The facilitator lists the gaps identified in the matrix used in the previous session.



Example:

<b>Social protection programme</b>	Maternity leaves and maternity benefits (Note: The example is based on the Philippines' case)
<b>Difficulties being addressed</b>	Income loss during pregnancy, childbirth, or miscarriage
<b>Administrator of the programme</b>	Social Security System
<b>Entitlements/benefits under the programme</b>	100 percent of the salary during the period that the woman worker was unable to work (60 days for normal delivery and 78 days for caesarian section delivery)
<b>Who benefits?</b>	Women workers who are members of the SSS
<b>Source of funding</b>	Workers' and employers' contributions for private sector employees & workers' contributions for voluntary and self-employed members.  For private sector employees, the employer will advance the payment of the maternity benefits and the SSS will reimburse the employer.
<b>Gaps/Analysis</b>	Coverage: Workers from the informal sector tend to be excluded as their membership is voluntary only. Workers who are members of the SSS but were not able to pay at least 3 months' contributions within 12 months immediately prior to childbirth or miscarriage are not entitled to benefits.  Accessibility: Notification to the employer and the SSS and various requirements have to be submitted before becoming eligible to the benefits.  Adequacy: Maternity leave period is too short. Only the first four childbirths and miscarriages are covered.  Gender responsiveness: Yes. Male workers are also entitled to 10 days of paternity leave.

### **Session 7: Demanding for better social protection**

**Objective:** To identify the social protection demands of the workers from the gaps that were identified.

**Activity:** Group discussions

**Time:** 30 minutes

**Method:**

1. Form groups of 4-5. Ideally, the groups from the previous activity stay the same.
2. Based on the mapping of the gaps from the previous session, the facilitator will explain the need to address the gaps and the workers' right to demand for better social protection.

## 3. Guide questions:

- a. Based on your personal experiences and the gaps identified in the previous session, what are your demands for better social protection?
- b. The social protection programmes in this country are not adequate to address all the difficulties in your lifecycle. What kind of social protection programmes should be adopted to address these difficulties?

4. Each group will list their demands on the flipchart or PowerPoint.

5. The overall facilitator will consolidate the demands of all the groups on the flipchart or PowerPoint.

<b>Social protection programme</b>	Maternity leaves and maternity benefits (Note: The example is based on the Philippines' case)
<b>Difficulties being addressed</b>	Income loss during pregnancy, childbirth, or miscarriage
<b>Administrator of the programme</b>	Social Security System
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<b>Demands</b>	Mandatory coverage of informal workers in the SSS, with the government paying the employer's counterpart  Extension of maternity leaves to 100 days

## MODULE 3: ORGANISING FOR SOCIAL PROTECTION

The aim of this module is to piece together all the parts of the training, draw conclusions, and encourage the participants to reflect how they themselves can fight for better social protection.

### Session 8: *Prioritisation of demands*

**Objective:** To prioritise the demands identified in the previous session

**Time:** 45 minutes

**Materials needed:** Consolidated list of demands, post-its, sticky dots, markers

**Method:** Plenary discussion

1. The facilitator will recap the demands identified by the participants.
2. Ask the participants to identify their top three demands.
3. Everyone will vote on which demands should be prioritised. Suggested voting procedure: a) provide each participant 3 sticky dots; b) each dot, one vote; c) participants stick dots to the list of demands; and d) participant cannot place more than 1 vote/dot per demand.
4. The facilitator will explain that the three demands with the highest votes may be considered as the organisation's focus in terms of social protection work.

**Note to facilitators:**

- The leaders and organisers of the organisation can consider this prioritisation exercise as a bottom-up approach of knowing the issues and demands that are most important to the workers. They can use these information to organise workers around the priority issues or to develop strategies and programmes that are more responsive to the needs of their members.

### Session 9: *Strategies in organising for social protection*

**Objective:** To learn from other's experiences and strategies in organising and advocating for social protection

**Time:** 1 hour

**Materials needed:** Printout of case studies, flipchart papers, markers

**Method:** World cafe

1. The participants will be divided into 3 groups, seated in three different tables.
2. Each group will be assigned a case study. The groups will read the case study assigned to them and have a short discussion for 15 minutes. After 15 minutes, each group will move to a



different table to discuss a different case study. Repeat the process until all groups were able to discuss all the three case studies.

3. Assign a documenter per table.

4. Guide questions:

a. Based on the case study, identify the main strategies used in organising and advocating for social protection.

b. Do you think the same strategy can be used or applied in your organisation?  
How?

c. Based on your experience in your organisation, what strategies have you developed to address similar issues?

5. A documenter will list the answers in the flipchart paper.

6. At the plenary, the facilitator may consolidate the discussion by asking select participants what they learned from the case studies and what they think they can do to push for the demands that they have previously identified.

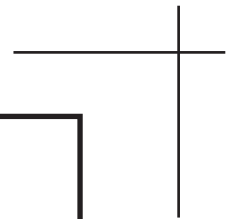
**Note to facilitators:**

- Sometimes, it is difficult for workers to imagine what can be done to address the issues and fight for their demands. Thus, the case studies are used as concrete examples that show how the workers can fight for the better social protection.
- Emphasize that the workers themselves are the agents of change. The strategies in the case studies might differ; some even have multiple strategies for one specific issue. Yet, the main similarities are that the workers themselves have identified their problems and demands and that they organise to take actions to change their situations.

Example:

**Example 1: Fighting for pensions in China through court cases**

The first generation of migrant workers in China, who started to work in urban areas in the 1980s, are approaching retirement age. However, due to various reasons such as discriminatory laws and gender-based discrimination at the workplace, women workers find it difficult to access their pensions as prescribed by the Social Insurance Law. To address this, labour organisations in China have formed workers' concern groups and initiated court cases against the government to claim social protection benefits. They also collectively initiated petitions, directly highlighted the issues and problems of existing policies, and proposed necessary recommendations. The approach is meaningful in the sense that it used social protection as a cross-cutting issue to organise workers, thereby providing an opportunity for workers to engage with controversial issues in society, such as gender inequality.



**Example 2: A community-based initiative to provide childcare and basic social services for women workers in Indonesia**

The Indonesian government has been progressively giving up its responsibility to provide public goods and services to the private sector. As a result, the quality of life of workers in Indonesia is decreasing sharply. As an alternative to state- and private sector-provided services, the Karya Utama Trade Union Federation (FSBKU) established a workers' centre, which is designed as a self-organised and non-statutory social protection initiative for the workers and their communities.

FSBKU recognises that women workers are disproportionately responsible for household activities and that this reality limits their participation in the activities of their organisations. The formation of the workers' centre aims to address this issue of female unionists by providing child care services and facilitating the delivery of basic living needs. The workers' centre is also used to organise and provide trainings to women workers and build their leadership capacity, and in the long run, address male domination both in the organisation and the household.

**Example 3: Domestic workers fighting for legal recognition and protections in India**

In the past decade, domestic workers in India have created a vigorous movement through grassroots organising, leading to the establishment of the National Domestic Workers Movement (NDWF) in 2013. The mobilisation and advocacy of domestic workers resulted in significant achievements in fighting for their legal and social protection. In particular, through the mobilisation of domestic workers in 10 states in India, domestic workers have gained legal recognition and protection. Also, some states in India have extended the coverage of the minimum wage and domestic violence laws to domestic workers. At present, domestic workers in India continue to push for the government's ratification of ILO Convention 189 on Domestic Work.

## MODULE 4: THE ROLE OF SOCIAL PROTECTION IN TRANSFORMING SOCIETY

The first three modules presented the role of social protection in addressing the difficulties experienced by the workers in their lifecycle. However, the role of social protection is not only to ensure a certain individual's wellbeing and dignity but also to transform an unequal society into a just society.

This final module is an attempt to encourage workers to look beyond their daily struggles and enhance their understanding of the broader society. It is aimed at giving the participants a broader understanding of the transformative role of social protection in the country. It stimulates the participants to think beyond the social protection policies and programmes, particularly in terms of their implementation and outcomes. It intends to generate a critical analysis of how the overall social protection strategy are related to economic policies and ideology of a country.

Developing a critical analysis of the structural issues of the society and the political-economic system in which they happen requires a long time as well as a vast knowledge and experience. Hence, this part of the training can be considered as a starting point of a continued and sustained political education among the workers.

### **Session 10:** *Social protection: Does it transform the society?*

#### **Objective:**

- To critically analyse whether social protection transforms the society
- To understand how social protection policies and programmes are linked with a country's economic ideology

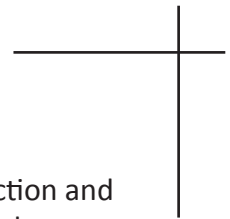
**Activity:** Case studies

**Materials:** Printouts of the case studies (Choose from the different case studies in Annex B)

**Time:** 60 minutes

#### **Method:**

1. The participants will be divided into groups of 4-5.
2. Each group will be assigned a case study to read. After reading the case studies, the groups will discuss for 20 minutes. Specific questions are provided at the end of the case study. Generally, the questions are aimed at getting the participants to:
  - a. give their observations about the case study;
  - b. share their opinions and feelings about their observations;
  - c. understand how the case is related to that particular country's economic ideology;
  - d. reflect about their own country's social protection strategy and its connection with the national economic ideology.
3. To the bigger group, each group will share what they have discussed. Each group should assign a reporter.



### Note to facilitators:

- It will be a challenge to trigger a discussion on the relationship between social protection and the national economic ideology. Hence the use of case studies from other countries to draw clear illustrations of this relationship.
- In this regard, the facilitators should understand the case studies and the main discussion points in each of them. The specific discussion points in each case study may differ but they all lead to a general discussion of the paradoxes of social protection. On the one hand, social protection programmes are supposed to protect the workers and other marginalised people. On the other hand, the way social protection programmes are designed and implemented actually makes people more vulnerable.
- Point out that transformative social protection should address not only the workers' problems but also the root causes of such problems. It also brings about societal change towards a fairer, just society.
- In enriching the discussion, the facilitators can relate the participants' observations, opinions, and reflections to the AROSP principles (see Annex).
- As the discussion might be difficult conceptually for some participants, be patient and take time to translate difficult concepts to concrete and relatable examples. Ask questions that can prompt them to make their own judgments based on what they observe and how their observations differ from their ideal situation or the ideal role of social protection.
- Do not forget to put a gender perspective in the discussion.

### Session 11: *Building a movement on social protection*

This session is the concluding session of the training. However, it marks the start of the real work of the organisers and the workers.

**Objective:** To educate the workers about the importance of movement building on the issue of social protection.

**Activity:** Plenary discussion

**Time:** 30 minutes

1. The facilitator will recap the process. She/he can make the recap participatory and interactive by asking the participants (i) what they learned and (ii) how they think they can apply what they learned in their daily struggles.
2. The facilitator can then relate the recap and discussion with the importance of movement building on the issue of social protection.



## Social protection as a long-term struggle

Attaining social transformation through social protection is through a long-term struggle. As we have learned, social protection should address not only individual vulnerabilities but also the illness of the society. It should not serve as an instrument for the huge corporations and the government to pursue their neoliberal agenda. This will take a long time as it requires changes in economic and political system, including the realignment of social protection with pro-people and redistributive economic policies.

Changing the social structure is not only demanding for or modifying a single policy. In fighting for transformative social protection, a hit-and-run approach will not work. Instead, a long-term and sustainable movement building is needed to pursue a structural change in the society.

The foundation of this long-term struggle and movement building should be a strong organised mass base. Marginalised workers might have limited power vis-a-vis the oppressive political and economic structure but coming together can help them build bargaining power. The stronger the organising, the greater the bargaining power.

We organise for various reasons. We organise to connect ourselves to the others. We organise to share our happiness and difficulties with other workers. We organise to solve collective problems together. We organise to make ourselves stronger and to have more bargaining power against employers. We organise to have better protection. Most importantly, we organise to change the unjust political and economic structure.

Once organised, one of the actions that can be taken is through advocacy for social protection. Organisations should be careful in strategising their advocacy. Advocacy entails various activities such as conducting research, identifying and linking with advocacy partners and targets, and getting popular support from the people outside the organised groups, among others. Yet, most critical is that the advocacy is developed in a bottom-up, participatory, and democratic approach to fully reflect what the workers at the ground need and want. Organising and advocacy should be a process of empowerment in which workers can tell their own stories, discuss their needs and difficulties, build their capacity to fight for their rights, and develop their own strategies and actions to change their situations. The workers themselves can define what is best for them. This is the fundamental principle on which this manual was developed.

# ANNEXES

## Annex A: Overview of the Asian Roundtable on Social Protection (AROSP)

The Asian Roundtable on Social Protection (AROSP) is a network of grassroots workers' organisations, trade unions, NGOs, and scholars in Asia that work on the issues of formal and informal workers. AROSP serves as a platform to provide mutual help, facilitate information sharing, and help organisations build their understanding on social protection. As a regional network, it aims to support and consolidate the regional struggle for social protection for the poor across various sectors in Asia.

### Historical development of the AROSP Network

Established in 2009, the Asian Roundtable on Social Security (AROSS) served as a platform for exchange of information on social security issues in Asia.

In its first meeting, AROSS identified the basic principles of a comprehensive social security. It also demanded the Asian governments (1) to recognise the social security rights for all through national legislation and to ensure its effective implementation and 2) to commit a considerable percentage of the GDP (at least six per cent) to social security by 2015.

In the second AROSS meeting in 2010, the network deliberated on how to 1) to ensure the social security rights of workers in the region; 2) to guarantee workers, including migrant workers, a fair share of economic progress; 3) to better match human resources and the regional economy; and 4) to strengthen Asian solidarity on social security issues. The core working group of AROSS proposed a unified Asian social security minima for providing a basic but unified living protection to all Asians. The proposal laid out a comprehensive framework and benchmarks of social security system that carry the principles and demands of AROSS.

The theme for the third AROSS meeting in 2011, "Asian Minima in Practice," focused on the issues of social assistance and minimum wage. The meeting specifically aimed to review the progress in the legislation and implementation of the minimum social security for the people -- minimum wage and social assistance. It was highlighted in the meeting that to build Asian solidarity and to secure fair share of economic progress in the region, Asian governments have the responsibility and obligation to adopt a unified standard for Asian minima.

The fourth AROSS meeting in 2013 under the theme "Sharpening the Labour's Role in Advancing Social Protection for All in Asia" reflects the labour movement's increasing involvement in the discussion of social protection. In the past, the AROSS network had been predominantly composed of scholars, representatives from non-government organisations, and activists.

However, in 2013, the network made a conscious decision to widen its network and reach out to grassroots organisations of workers in both the formal and informal economy. It also committed to 1) aggressively in building information through research and awareness-raising on social protection through intensified advocacy and campaigns and 2) work together and embrace new forms of organising towards a cross-sectoral collaboration of working peoples' movements across Asia in the struggle for social protection reforms in our respective countries and collectively, in the Asian region.

It was also in 2013 that the network changed its name to Asian Roundtable on Social Protection (AROSP) as it recognises that amidst Asia's unequal and jobless growth and worsening poverty, the labour and social movements demand not merely for access to narrow and non-inclusive social security. Rather, they call for a transformative social protection that restores human dignity, especially of the vulnerable and marginalised.

## Principles of a transformative social protection: The AROSP perspective

Over the past years, AROSP consolidated the demands of the grassroots and marginalised workers on social protection. Specific demands vary yet the main principles that the provision and implementation of social protection should have are similar.

- **Rights-based and non-discriminatory.** Social protection is not a privilege of a select segment of population that can afford it. Instead, social protection is a basic human right that encompasses all individuals without discrimination -- without distinction on the basis of gender, age, ethnicity, race, citizenship, religious belief, caste, political affiliation, and employment status, among others.
- **Universal and inclusive.** As a fundamental right of every person, social protection should be available for all without strict and bureaucratic requirements of eligibility. At present, social protection can only be accessed by a few. Most social protection programmes are limitedly available for formal sector workers. Those who are the more vulnerable – the workers in the informal sector – are either excluded in the coverage or having difficulty in accessing social protection because of their informal status. Some programmes, particularly social assistance programmes, select beneficiaries based on a targeting system that excludes poor and vulnerable people.
- **Grassroots-oriented.** Social protection programmes are usually designed in a top-down manner, without a clear understanding of the daily plight of the workers. They should rather take into account the kind of social protection that the grassroots want.
- **State's responsibility not private sector-led.** Most of the social protection programmes are marketised, instead of provided by the state. They heavily involve the private sector that operate for profit at the expense of the people's difficulties. For instance, public hospitals and basic services are being privatised while the insurance industry is dominated by big insurance companies. While most governments recognise the need to provide social protection for its citizens, the extent of social protection provision depend only on what the budget can afford. Most social protection programmes are given measly budget by the government; thus, they are usually contributory and require huge out-of-pocket expenses.
- **Democratic, participatory, and civil society-driven.** The processes in social protection -- starting from the design, development until the implementation and monitoring and evaluation, should be consultative, transparent, representative, and participatory. social protection should be an empowering process/programme that actively involve the people, especially the poor, by treating them as partners in and agents of change, rather than mere beneficiaries of charity or clients of a for-profit company.
- **Comprehensive.** Most social protection programmes are limited to pension, social insurance, health insurance, etc., characterised by high contribution yet limited benefits. Social protection must be comprehensive, addressing the people's vulnerabilities from different stages of their life cycle. Further, it should be recognised that in the current globalised economic regime, the people's vulnerabilities are not only limited to those that they suffer as a result of the changes in the different stages of their individual lives.

Life's uncertainties can arise from economic and environmental insecurities as well. Thus, social protection should free the people from uncertainties caused by economic crisis, environmental disasters, and dispossession resulting from anti-people development policies.

- **Reform-grounded, transformative, anchored in a pro-people development policy.** Social protection programmes that merely scratch the surface of the society's problems cannot lead to social transformation. They should be able to address the root causes of poverty. Thus, for social protection to work towards reclaiming people's dignity, it must be coupled with substantial reforms

– economic, environment, social, and labour reforms -- that challenge the prevailing neoliberal development policy.

## AROSP's approaches in analysing social protection

- **From 'floor' to ceiling.** Social protection should not be a narrow form of assistance with minimal state intervention that tries to address basic needs for survival. Its main objective is not to ensure poor's survival and subsistence but to guarantee them a life of dignity.
- **Life-cycle approach.** Social protection should take into account the difficulties faced by the people in all stages of the life cycle. However, this approach should be expanded to also take into account the contexts in which the changes within the life cycle happen, including economic, social, political, and environmental.
- **Root-cause approach.** Social protection has to look at the root causes of vulnerabilities or the structural causes of poverty. It should tackle the problems within the oppressive economic and political structure. Some examples of these structural causes are deep-rooted discrimination against certain segments of the society, land grabbing, restructuring of the economy, dispossession from so-called development projects, capital accumulation, and expansion of TNCs.
- **Beyond formalisation.** With the adoption of the ILO Recommendation 204, the idea of formalising the informal workers has slowly been mainstreamed. However, AROSP argues that instead of focusing on formalisation, the initiatives should rather promote the universalization of rights. Even in the formal economy, informalisation happens. It should be recognised that the main problem is not the informality itself but the reasons behind it.
- **Claiming a say in budgeting.** Asian governments do not prioritise social protection. Most actually prioritise defense over health, education, and other social services. It is reflected in how they allocate their budget. Even the relatively more developed countries in Asia have very low spending in public social protection. Thus, in line with the principle of participation, the civil society should claim and be given a say in how governments allocate their budget, considering that the resources are mostly from the people's taxes.
- **Right-based financing and rights-based social protection funds management.** It has been a normal practice that social insurance contributions are invested in high-risk instruments and private entities to support a volatile market. Some of these instruments are tied with corporations that destroy the environment and livelihood of the people and do not respect labour rights. This financialisation has been happening for a long time, but the people are not aware that their contributions are being co-opted by the market and used for further capital accumulation. Financing and management of social protection funds should not be an extension of neo-liberalism.
- **Bottom-up approach.** In advocating for transformative social protection, the bottom-up approach should be adopted. As mentioned earlier, social protection should primarily be defined by the grassroots and should serve the grassroots; thus, the grassroots should be the foundation of the social protection advocacy. Sustainable marginalised workers' organisations should be built and strengthened, with a leadership that comes from their ranks.

In particular, women's participation and leadership should also be promoted so that they can represent their issues. Aside from organising, AROSP recognises that social protection is an issue that encompasses different sectors. Hence, building a cross-sectoral alliance for advocating social protection at the national and regional levels is critical. However, it should be repeatedly noted that national and regional advocacies should be built from grassroots demands and struggles.



## Annex B: The role of social protection in the development of the society: Case analysis of the Hong Kong, China, Philippines and Indonesia

Facilitators may print each individual case study along with the guide questions and distribute them to small groups to stimulate group discussions.



### Case study 1: Retirement policy in Hong Kong



Hong Kong has a highly developed economy that is primarily based on financial services. The median individual income in Hong Kong is around USD 1,800 per month. It has some of the richest people in world, yet it also has one of the highest income inequality ratios in the world. Around 300,000 elderly in Hong Kong fall below the poverty line and this amounts to one-third of the elderly population in Hong Kong. There is no universal pension scheme for persons over the age of 65. There are several

schemes that provide various levels of support during old age:

**Old age allowance - 'Fruit money':** All Hong Kong residents aged 70 or above receive a cash allowance of HKD 1,235, around USD 150 per month.

**Old age living allowance:** For those aged 65 or above and are having an income and assets not exceeding the prescribed limits receive HKD 2,398 around USD 300 per month.

**Comprehensive Social Security Assistance Scheme:** It serves as a safety net for the elderly living in poverty. Elderly who are entitled to the assistance will receive HKD 3,200, about USD 400 per month.

**The Mandatory Provident Fund (MPF) Scheme:** Employers and employees both contribute into a fund, and the accrued benefits remain in the MPF until the employee reaches the age of retirement. According to local legislation, every employer must ensure that all of their employees participate in the scheme. The civil society has identified the problems of the MPF scheme, in a report released in 2013.

1. The funds are collected by private companies, who charge high management fees from the contributions.

2. The retirement funds are invested into the stock market which can be risky and volatile. Currently the total amount of assets from the funds collected in the MPF is around HKD 600 billion, about USD 75 billion. 60% of the assets is invested in stocks. (The market value of Hong Kong's stock market around HKD 25 trillion, about 3 trillion USD.)

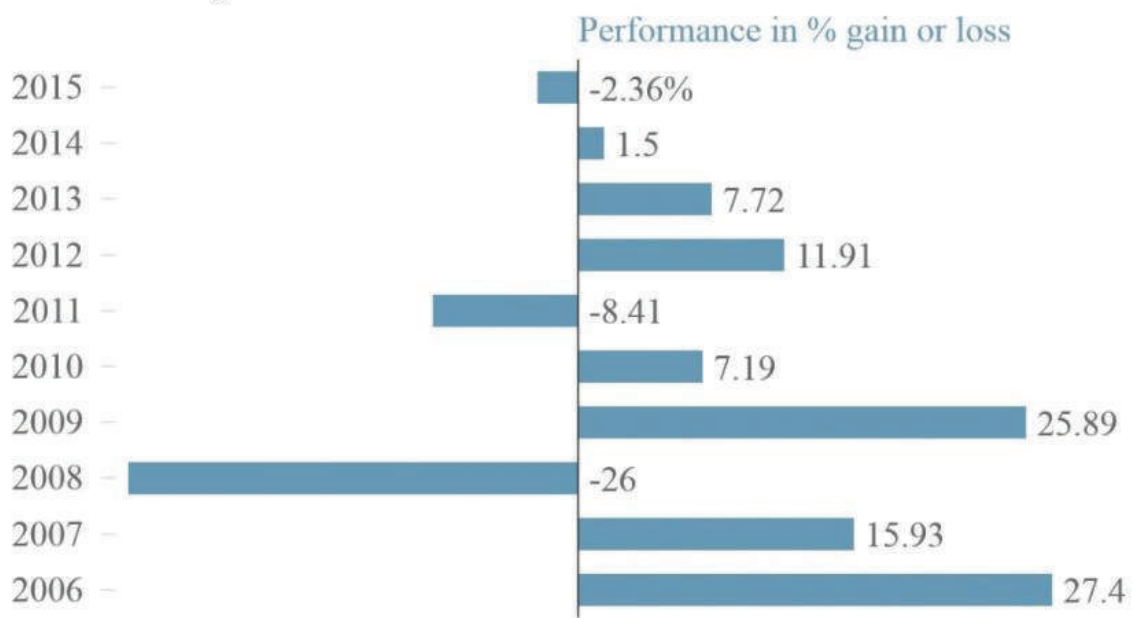
3. The fund lacks protection on low income people and people who are not active in workforce, including housewives or househusbands.

4. A number of elderly have not participated in the scheme or have only joined the scheme for a short time and hence the amount of benefit received upon retirement is not sufficient

to maintain their livelihood.

5. The fund can be used by employers to offset severance payment and long service payment. Trade unions and civil society in Hong Kong give special focus on how the elderly can live a decent life after they have retired. They have criticised the retirement system in Hong Kong as lagging behind international standards of social protection. They have been demanding for a universal pension system in the past decades, recognising that the older persons have contributed to the society as workers throughout their lifetime and that pensions should be a guaranteed to them as a basic right

### The Mandatory Provident Fund's Performance



Source: Thomson Reuters Lipper

SCMP

#### Guide questions for discussion:

1. What do you observe about the case study?
2. Does economic growth guarantee social protection?
3. Does the safety net policy eradicate poverty?
4. What do you think about the role of social protection in this case? In your opinion, does this kind of social protection transform the society?
5. Reflect about the social protection in your country.
  - a. Does it address the roots of the problems?
  - b. Does it redistribute wealth and resources fairly?
  - c. Does it transform the society?

#### Notes to facilitators:

1. The Hong Kong's economic system has been described as based on principles of free market, laissez-faire capitalism, and a neo-liberal big market, small government.
2. Recently, at the end of 2015, the government put forward its proposed reforms on the retirement policy in Hong Kong for public consultation. The government favoured an 'economic need based' scheme with a means test. It has claimed that the universal pension schemes proposed by the researchers and civil society is not sustainable and will lead to the bankruptcy of the retirement funds. Labelling the universal pension option as a 'regardless of rich or poor' option, the government also alleged that the burden to finance this option will be put on the shoulders of the teenagers of Hong Kong.





## Case study 2: Pensions in China

The retirement protection in China for grassroots workers is mainly based on endowment insurance which is a significant part under the overall social insurance in China. The endowment insurance is a mandatory scheme under the policy of the state. The relevant law and regulations on the endowment insurance require employees and employers to contribute into the scheme. The current premium rate of the endowment rate for the employer and for the employee are 20% and 8% of the previous year's total wage, respectively. The contribution is divided into two parts: a pooling fund and a personal account.



After the workers retire, those who participated in the endowment insurance are entitled to receive a monthly benefit. The benefit comprises of two parts: the basic benefit and the benefit from the personal account – respectively calculated based on the number of years that the worker had participated in the scheme, and the amount in the personal account of the worker. The threshold to access to the basic benefit is that the worker has contributed in the scheme for 15 years. The amount of benefits increases with the number of years of participation in the insurance. Currently, the retirement ages prescribed by law are 60 for men and 55 for women.

Over the past decade, different problems emerged in the endowment insurance which drew the concern of government officials, workers, civil society and academics. The issues include the unsatisfactory participation rate of migrant workers, portability of the contribution due to the mobility of migrant workers, empty personal accounts because of the appropriation of funds in the accounts by the state to cover the deficits in the pooling fund, administrative hurdles hindering workers to access the endowment insurance, the investment of pension fund into stock market etc.

In 2016, the Chinese government is going to start the implementation of investing the pension fund into the domestic stock market. Recently, the accumulated amount of pension funds is more than CNY 4 trillion (USD 600 billion). The proportion which can be invested into the stock market is 30% of the net asset value. It has been estimated that around CNY 600 billion ( USD 90 billion), will be permitted to be invested, which is around 1.5% of the combined value of the Shenzhen and Shanghai stock markets of around CNY 40 trillion (USD 6 trillion).

The government said that investment will lead to the growth of the pension fund and is positive to the provision of benefit to the people. The government states that it has mechanisms to maintain the stability of the fund. However, the investment of pension fund in domestically-listed shares and other market instruments creates debates in Chinese society. On one hand, it is criticised as using public funds to boost the private market, especially in the context that the performance of Chinese stock markets is not good and the current value of the two markets has been reduced by half compared to its value in mid-2015.

And it reflected the pension fund has been used for the development of capitalist market by integrating the fund with the capitalist market. On the other hand, there is concern over whether the investment will affect the release of benefit that the amount will be reduced.

Globalization Monitor, an NGO based in Hong Kong, took the examples of the deficit in pension in Australia and the United States after the economic crisis happened in 2008 and commented that the investment is possibly another experiment of the Chinese government and if there are losses in the funds, the grassroots are going to bear the outcome.

In 2006, over CNY 10 billion of social insurance funds in Shanghai were embezzled by government officials. Meanwhile, a columnist pointed out that there is little transparency and legal protection in regards to the stock market and how the fund will be managed is a primary problem so that the funds are not eroded due to corruption and not invested into companies which damage the environment and violate workers' rights.

**Guide questions for discussion:**

1. What do you observe about the case study?
2. What is your opinion about investing the workers' money in the capitalist market?
3. Why are there concerns over the pension fund?
4. Reflect about the social protection in your country.
  - a. Is social protection in your country properly managed?
  - b. Is social protection in your country transformative?





### Case study 3: Financialisation of social security funds in the Philippines

The Social Security System (SSS) manages the social security programme in the Philippines, which addresses the members' loss of income during maternity, retirement, sickness, death, and disability. The social security programme is contribution-based where the employer contributes 7.37% while the worker contributes 3.63% of the monthly salary. Self-employed and informal workers can become voluntary members of the SSS. They pay the full amount of contribution based on the amount of their earnings.

The contributions collected are managed by the SSS. These are the same funds used to pay the benefits claims of its members. What happens to the surplus between the collected contributions and the benefit payments? The SSS is allowed to invest the surplus to different instruments, including the high-risk private equities.

A significant portion of SSS equity investments is ironically in the mining sector – known for hazardous work. The SSS directly owns 20.50 percent of the shares in Philex Mining Corp., the biggest mining corporation in the Philippines, through its board members. Philex was incorporated in the Philippines in 1955 to engage primarily in mining activities. The company runs the only copper-gold operation in the Philippines, the Padcal mine in Benguet province in northern Philippines. It also operates in Negros Occidental and Surigao del Sur.

In August 2012, Philex Mining Corp.'s Padcal mine tailings pond in Itogon, Benguet leaked due to days of torrential rain. An estimated 21 metric tons of tailings spilled into the Balog River and San Roque Dam, a crucial reservoir in Luzon. Following the incident, mine operations were suspended. SSS received some P694 million in cash dividends from Philex a year earlier, and so naturally must have incurred losses from the suspension. Not surprisingly, the agency had supported calls to resume the operations at Padcal despite lingering hazards posed to workers, communities, and the environment.

Following Philex's payment of some P1 billion in fines, the Mines and Geosciences Bureau allowed Padcal to resume operations in August 2014 despite strong opposition from various environmental groups who insist that the mine wastes had not been fully cleaned up. When the mine tailings spilled, the communities living nearby were negatively affected. A fishing ban was imposed because the rivers might be contaminated by lead, cadmium, mercury, and chromium. Farmers, on the other hand, reported that there was a decrease in their yield due to the tailings.

On the one hand, the SSS funds are supposed to be addressing the workers' vulnerabilities. Yet, on the other hand, these funds are actually supporting a company that destroys the environment and causes more vulnerabilities to the communities where it operates.

#### Guide questions for discussion:

1. What do you observe about the case study?
2. What is your opinion about investing the workers' money in big corporations, especially extractive industries like mining?
3. What do you think about the role of social protection in this case? In your opinion, does this kind of social protection transform the society?
4. Reflect about the social protection in your country.
  - a. Does it address the roots of the problems?
  - b. Does it redistribute wealth and resources fairly?
  - c. Does it transform the society?





## **Case study 4: Demanding for social protection or demanding for pro-people economic policy? The case of Indonesia**

In the last quarter of 2015, Indonesia became covered with thick and hazardous haze arising from the burning of forest peatlands that were being developed for oil palm plantations. The haze was so extensive that it affected neighbouring countries such as Malaysia, Singapore, and even the southern part of the Philippines. While the haze was perhaps at its worst at that time, the haze and forest fires have been a problem in Indonesia for decades.

About half a million residents of Indonesia suffered from acute respiratory infections and other haze-related illnesses, such as eye and skin irritations. Most of the victims were children. More or less 20 deaths induced by the haze had also been reported. In response, the people demanded President Joko Widodo to immediately evacuate the affected communities and provide healthcare to the victims.

Yet, in this situation, even if the government provides social protection in the form of healthcare, the main cause of the problem remains. Large-scale, corporate, and export-oriented oil palm plantations covering around 12 million hectares of lands continue to operate. The palm oil industry promised job creation and industrial development. But in reality, the rapid expansion of oil palm plantations have resulted in various problems and haze is just one of them.

The palm oil industry in Indonesia has been associated with bigger problems, such as land grabbing, displacement of indigenous peoples from their ancestral lands, human rights violations, slave-like working conditions (e.g., poverty wages, unpaid family labour, child labour, long working hours, exposure to hazardous pesticides and chemicals). It takes away and destroys the common goods from the people such as land, natural resources (i.e., some rivers were reclaimed to transform them into plantations, resulting in the people's loss of potable water), and clean air. The government turns a blind eye on these issues because it protects the palm oil industry, which is the main industry in Indonesia.

Hence, aside from the immediate demand of providing healthcare, activists also call the government to stop oil palm plantations in the country. On April 2016, President Jokowi announced a moratorium of the issuance of new permits for oil palm plantations. However, the moratorium is only temporary.

### **Guide questions for discussion:**

1. What do you observe about the case study?
2. In the context of the haze problem in Indonesia, is healthcare for the victims the best social protection? What is the best social protection for the people in this case?
3. Reflect about the social protection and economic policies in your country.
  - a. How are they similar or different from the case of Indonesian palm oil industry?
  - b. Do the economic policies in your country prioritise the welfare of the marginalised workers?
  - c. Does the social protection in your country target the root of the problems? Does it transform the society?

### **Notes to facilitators:**

1. The main cause of the Indonesian people's suffering is the pro-capitalist economic policies of the government. These policies have actually dispossessed people of their lands and displaced them from their communities. While there are jobs created by the industry, Indonesia promotes cheap labour that disregards safety of the workers. In this case, we can observe that social protection

policies or programmes that address only the surface of the workers' problems (i.e., healthcare for victims of haze) are not enough to transform the society as long as the economic system prioritises the interests of the capitalists over the welfare of the marginalised communities. The problems will perpetuate until the root causes are addressed.

2. In some cases, social protection is just a band-aid solution to the long-term problems of the society, which are often caused by the neoliberal economic policies of the country.



## Annex C: Key statistics on social protection

Table 1: Overview of national social security systems

Country	Number of policy areas covered by at least one programme		Existence of programme(s) anchored in national legislation							
	Number of policy areas (branches) covered by at least one programme	Number of social security policy areas covered by at least one programme	Sickness (cash)	Maternity (cash) 1	Old age 2	Employment injury 3	Invalidity	Survivors	Family allowances	Unemployment 4
Bangladesh	4	Very limited scope of legal coverage 1 to 4	1	1	1	1	None	None	None	3
Cambodia	-	-	-	3	-	-	-	-	-	3
China	8	Comprehensive scope of legal coverage 8	1	1	1	1	1	1	1	1
Hong Kong, China	8	Comprehensive scope of legal coverage 8	1	1	1	1	1	1	1	1
India	7	Semi-comprehensive scope 7	1	1	1	1	1	1	None	1
Indonesia	4	Very limited scope of legal coverage 1 to 4	4	3	1	1	1	1	None	3
Japan	8	Comprehensive scope of legal coverage 8	1	1	1	1	1	1	1	1
Korea, Republic of	5	Limited scope of legal coverage 5 to 6	4	3	1	1	1	1	None	1
Lao People's Dem. Rep.	6	Limited scope of legal coverage 5 to 6	1	1	1	1	1	1	None	None
Malaysia	4	Very limited scope of legal coverage 1 to 4	4	3	1	1	1	1	None	3
Myanmar	3	Very limited scope of legal coverage 1 to 4	1	1	3	1	3	3	Not yet	Not yet
Nepal	4	Very limited scope of legal coverage 1 to 4	3	3	1	1	1	1	None	3
Pakistan	6	Limited scope of legal coverage   5 to 6	1	1	1	1	1	1	None	3
Philippines	6	Limited scope of legal coverage 5 to 6	1	1	1	1	1	1	None	3
Sri Lanka	5	Limited scope of legal coverage 5 to 6	4	3	1	1	1	1	1	3
Thailand	8	Comprehensive scope of legal coverage 8	1	1	1	1	1	1	1	1
Timor-Leste	-	-	-	3	1	-	-	-	None	None
Viet Nam	7	Semi-comprehensive scope 7	1	1	1	1	1	1	None	1

Source: World Social Protection Report 2014/15



Table 2: Public social protection expenditure, 1990 to latest available year (percentage of GDP)

	Total public social protection expenditure and health expenditure (% of GDP)			latest year for disaggregation		Public health care (% of GDP)	Public social protection (excluding health care) (% GDP)
	1990	2000	2010-2011			latest year	latest year
<b>Regional average (weighted by total population)</b>							
Asia and the Pacific	3.40	3.50	5.30				
Western Europe	20.90	23.30	26.70				
World	5.80	6.50	8.60				
<b>Selected Asian countries</b>							
Bangladesh	0.71	1.12	2.69	2.69	2011	1.11	1.58
Cambodia	1.97	1.05	1.79	2.23	2013	1.45	0.79
China	5.20	4.70	6.83	6.83	2010	1.27	5.56
Hong Kong, China	2.43	4.52	4.58	5.17	2012	2.92	2.25
India	1.73	1.61	2.64	2.39	2012	0.96	1.42
Indonesia	-	1.80	2.63	2.63	2010	2.63	1.03
Japan	11.11	16.28	23.56	23.56	2011	6.81	16.75
Korea, Republic of	2.82	4.82	9.14	9.14	2011	4.00	5.13
Lao People's Dem. Rep.	1.30	1.67	1.74	1.74	2010	1.22	0.52
Malaysia	2.70	2.40	2.89	2.99	2012	1.99	1.00
Myanmar	1.75	0.49	0.96	0.94	2010	0.24	0.70
Nepal	1.96	1.73	2.31	2.19	2013	1.53	0.66
Pakistan	1.50	0.27	1.68	1.68	2010	0.38	1.30
Philippines	1.06	1.09	1.75	1.55	2012	0.56	0.99
Sri Lanka	5.34	4.41	3.14	3.00	2012	1.31	1.69
Thailand	1.47	2.57	7.24	7.24	2011	2.27	4.98
Timor-Leste	-	-	3.49	4.24	2013	1.64	2.61
Viet Nam	2.50	4.06	6.28	6.28	2010	2.54	3.74

Source: World Social Protection Report 2014/15

## Annex D: Links for data and information on Social Protection

**Asia Monitor Resource Centre (AMRC):** <http://www.amrc.org.hk/>

**Social Protection and Human Rights:** <http://socialprotection-humanrights.org/>

**ILO Social Protection:** <http://www.social-protection.org/gimi/gess/ShowMainPage.action>

**Friedrich Ebert Stiftung:** <http://www.fes.de/GPol/en/>

**Global coalition for social protection floors:** <http://www.socialprotectionfloorscoalition.org/>

**SOLIDAR:** <http://www.solidar.org/Decent-Work-Social-Protection.html>

**Network for Transformative Social Protection in Asia (NTSP):**  
<http://www.lifeofdignity.org/index.html>

**Right to Social Protection in Asia: Achievements and Challenges (WSM):**  
<http://rightspasia.blogspot.hk/>

**HelpAge International:** <http://www.helpage.org/what-we-do/social-protection/>

**Women in Informal Employment: Globalizing and Organizing:**  
<http://wiego.org/wiego/core-programmes/social-protection>

**Social Security Administration USA - Social Security Programs Throughout the World:**  
<https://www.ssa.gov/policy/docs/progdesc/ssptw/index.html>

**International Monetary Fund - Data:** <http://www.imf.org/data>

**Central Intelligence Agency - The World Factbook:**  
<https://www.cia.gov/library/publications/the-world-factbook/>

**World Bank -**

**Social protection:** <http://www.worldbank.org/en/topics/socialprotectionlabor>

**Data:** <http://data.worldbank.org/>

# Annex E: Pre-training Needs Assessment Questionnaire

Participant name:

Age:  Sex:  Employer:

Industry:

Position in workplace:

Affiliated organisation:

Background of worker:

How many years have you participated in this organisation?

Are you holding any office in this organisation?

Knowledge on social protection:

Have you participated in social protection workshop before?  If yes, when and what

Do you know what social protection is?  What do you know about social protection?

Where did you learn about social protection?

Access to existing social protection programmes:

What social protection schemes are you participating?

Are you able to get the benefits of existing social protection schemes?  If no, why?

What are the other social protection schemes that currently exist?

**What are the other social protection schemes that currently exists?**

**What are your comments on these programmes?**

**Expectation on social protection:**

**What should be covered by social protection?**

**Who has the responsibility to provide social protection?**

**Who should be covered by social protection?**

**Who should be contributing to the fund of social protection?**

**What are the functions of social protection?**

**What are the functions of social protection?**

**How social protection is related to you, i.e. workers?**

**What do you want to know more about social protection?**

**How social protection is related to you, i.e. workers? Why?**

session 01	session 02	session 03	session 04	session 05	session 06	session 07	session 08	session 09	session 10	session 11
<p>flip chart and markers</p> <p>maximum time is 30 minutes</p> <p>divide into 2 groups</p> <p>group 1 pretends to be men</p> <p>group 2 pretends to be women</p> <p>assign a group reporter</p> <p>each group describe a happy worker with a dignified life in your country</p> <p>each group writes or draw their description</p> <p><b>TIP</b></p> <p>ask why men and women have different versions of dignified life</p> <p>ask why people have different ideas on dignified life</p> <p>end session by discussing fundamental elements of a dignified life</p>	<p>flip chart and markers</p> <p>maximum time is 45 minutes</p> <p>divide into groups w/ 4-5 members</p> <p>half of groups pretend to be men</p> <p>half of groups pretend to be women</p> <p>assign a group reporter</p> <p>each group writes or draw their discussion</p> <p><b>TIP</b></p> <p>share the life cycle approach</p> <p>point out the difference between the difficulties faced by men and women</p> <p>point out inequality, poverty, anti-poor economic policies, impact of the type of work</p> <p>display the chart created by participants</p>	<p>flipchart paper, smaller pieces of paper, sticky tape, and markers</p> <p>maximum time is 45 minutes</p> <p>divide into groups w/ 4-5 members</p> <p>assign a group facilitator, documenter, and reporter</p> <p>use problems identified in session 2</p> <p>problems as trunk of tree, branches as effect, roots as cause of problems</p> <p><b>TIP</b></p> <p>ask why does the cause occur, continue this process until the group cannot answer anymore</p> <p>explain why Neoliberalism is the main cause</p> <p>make sure to identify cause at each level, avoid jumping too far ahead</p>	<p>flip chart and markers</p> <p>maximum time is 30 minutes</p> <p>divide into 2 groups</p> <p>group 1 identifies workers from urban area</p> <p>group 2 identifies workers from rural area</p> <p>assign a group reporter</p> <p><b>TIP</b></p> <p>tell the groups to identify different kinds of workers from urban and rural area</p> <p>identify the sectors, identify the concentration of workers</p> <p>identify where women are concentrated</p> <p>activity 2 is optional but recommended</p>	<p>powerpoint presentation and/or handouts of the social protection matrix</p> <p>maximum time is 30 minutes</p> <p>presentation by facilitator/resource person</p> <p>assign a group reporter</p> <p><b>TIP</b></p> <p>identify existing social protection policies and programmes in the country</p> <p>identify objectives of such programmes</p> <p>identify beneficiaries covered by the social protection programmes</p> <p>identify benefits provided by the social protection programmes</p> <p>identify the source of funds for the programmes</p> <p>identify administrators of the programmes</p>	<p>papers/notebooks</p> <p>maximum time is 30 minutes</p> <p>divide into groups w/ 4-5 members</p> <p>assign a group reporter</p> <p><b>TIP</b></p> <p>use the matrix in session 5</p> <p>ask participants if they tried to access social protection programmes</p> <p>ask participants if it was easy or difficult</p> <p>ask participants if they receive help; if not, what did they do</p> <p>ask women participants their experience</p> <p>use the gap matrix</p> <p>discuss the double burden on women</p>	<p>flip chart and markers</p> <p>maximum time is 30 minutes</p> <p>divide into groups w/ 4-5 members</p> <p>assign a group reporter</p> <p><b>TIP</b></p> <p>keep the groupings from session 6</p> <p>discuss how to address the gaps identified in session 6; what kind of social protection programmes use the gap matrix; add demands to the matrix</p>	<p>consolidated list of demands, sticky dots, markers</p> <p>maximum time is 45 minutes</p> <p><b>TIP</b></p> <p>give 3 dots per participant</p> <p>each participant vote the top 3 demands; 1 dot per demand</p> <p>suggest that the top 3 demands can be the focus of work</p>	<p>3 tables, printout of case studies, flipchart papers, markers</p> <p>maximum time is 60 minutes</p> <p>15 minutes discussion time per table</p> <p>divide into 3 groups; 1 per table</p> <p><b>TIP</b></p> <p>assign 1 documenter per table</p> <p>identify the main strategies used in organising and advocating for social protection</p> <p>ask if they can be applied to their organizations</p> <p>ask what strategies their organizations use</p> <p>ask a few participants to share what they learned from the session</p>	<p>printout of case studies, flipchart papers, markers</p> <p>maximum time is 60 minutes</p> <p>divide into groups w/ 4-5 members</p> <p>20 minutes discussion time</p> <p>assign a group reporter</p> <p><b>TIP</b></p> <p>study beforehand the case studies to facilitate discussion</p> <p>relate the discussion to AROSP principles</p> <p>ensure gender perspective in discussion</p>	<p>plenary discussion</p> <p>maximum time is 30 minutes</p> <p><b>TIP</b></p> <p>make sure participants understand that social protection struggle is long term</p>

## Annex G: Documentation Template

Session Number:  Date of Session:

Number of Participants:  Group Number:

Name/  
Organization/  
Country of  
Participants:

Discussion Points:



ASIA  
MONITOR  
RESOURCE  
CENTRE