

**HelpAge  
International**

*age helps*



## **Advocating for social pensions**

### *Lessons learnt from the Philippines*

#### **Introduction**

HelpAge International's partner, the Coalition of Services for the Elderly (COSE) has been enabling older people to form community-led groups in the Philippines for over 20 years. These older people's organisation's (OPO) assist older people meet their health, social and other needs. However, COSE felt a number of factors were preventing the poorest older people from taking part in these OPOs and started exploring alternative ways to ensure that the poorest people also benefit.

Social pensions provide secure income for older people and are critical to reducing extreme poverty for older people. COSE started advocating for a social pension as a practical way of helping those in poverty. In 2010, after several years of advocacy, a social pension was approved, with COSE instrumental in lobbying the government.

While not all COSE's approaches will be suitable for all countries, it is hoped the key lessons outlined below can be used as a best practice guide for other organisations that are considering lobbying their national governments to introduce social pensions.

**Coalition of Services of the Elderly (COSE)**, founded in 1989, bases its mission on the tradition of respecting older people and supporting community-based programmes. COSE helps older people to continue living in their communities and contributing to the lives of others. COSE has organised 245 older people's associations nationwide and assisted them to establish their own community-based programmes for older people such as income generating projects, home care programme, community drugstore and social activities. COSE also provides capacity building activities to older people to develop their skills in lobbying policies to local and national government.

COSE is an active member of National Coordinating and Monitoring Board that ensures the full implementation of older people's law. Recent advocacy activities include mainstreaming older people's agenda in disaster risk reduction and seeking better healthcare.

# Lessons from the social pension advocacy process

## Ensure older people are included in developing the advocacy approach

In 2002, COSE learnt about the use of social pensions to tackle poverty and promote income security in old age at a HelpAge event. After sharing international experience on policies to address poverty in old age, COSE initiated its social pension advocacy process by mobilising support from older people (3,000 signatures collected). However, COSE wanted to speed the process along, and felt the approach was not right since, it was initiated by COSE and imposed on older people. COSE's actions had not been properly discussed with older people and older people did not really understand why social pensions were valuable. From COSE's experience, when older people do not clearly understand a project, it is difficult to mobilise them, even when they are not required to pay for their participation. COSE changed the approach by instead conducting research that included older people and gave them an opportunity to have their voices heard. Older people also played an important role in key events and decision making throughout the advocacy process.

## Build policy dialogue and get specific, relevant data that illustrates the issues

Meanwhile, COSE began advocating with the Department of Social Welfare and Development (DSWD), which is the Philippines government agency that has the mandate on ageing issues. As a result of this dialogue, COSE realised there was a need for country specific information on social pensions, not just international experience, to support its advocacy efforts.

COSE conducted research that gave older people the opportunity to analyse their own situation with support from academics. Income and health were identified as two key issues. COSE conducted further research on social pensions in 2005 which was supported financially by HelpAge International's East Asia and Pacific Regional Office after COSE expressed its interest in working on social pensions and deepening its understanding on social pensions. This research focused on analysing administrative data and national statistics which highlighted issues such as the fact that of 6 million people aged 60 and over in the Philippines, just 1.2 million had a pension.

## Build organisational capacity of state and non-state actors

Government representatives and COSE participated in a regional seminar held in January 2007 in Bangkok to discuss social pensions in the region. The seminar was hosted by HelpAge in collaboration with UNESCAP and the ILO, and attended by the UNDSA Secretary General. The seminar was mostly attended by government representatives with participation probably due to the fact the event was co-organised by key regional agencies and attended by the UNDSA Secretary General. Seminar participants produced a joint statement highlighting the importance of social pensions and called for initiative and implementation. COSE advocacy officer Ed Gerlock, who attended the seminar, was convinced that the universal social pension scheme was the best approach.

In July 2009, COSE's Advocacy Officer, one of the core staff working on social pensions, was supported by HelpAge to participate in the International Training on Social Transfers Programme in South Africa.

In October 2009, facilitated by HelpAge, COSE was invited to the Regional Social Protection Forum in the Philippines and in November 2009, COSE took part in social pension workshop in Chiang Mai organised by HelpAge.

### **Timeline of events: introducing a social pension in the Philippines**

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|-----------------------|--|
| <b>2002</b>           | COSE first learns of the role social pensions can play in tackling poverty and promoting income security   |
| <b>2002</b>           | COSE initiates social pension advocacy via a petition that gathers 3,000 signatures  |
| <b>2005</b>           | Conducts research with opportunities for older people to analyse their own situation with support from academics   |
| <b>2007</b>           | COSE develops a three year social advocacy workplan for 2007-2009  |
| <b>Jan – Jun 2007</b> | COSE drafts a social pension bill in consultation with stakeholders  |
| <b>Oct 2007</b>       | COSE identified and approached possible supporters of the bill in parliament   |
| <b>Oct 2007</b>       | Bill filed in October to take advantage of media coverage from International Day of Older People (1 <sup>st</sup> October)   |
| <b>Oct 2009</b>       | Floods caused by Typhoon Ketsana highlights the plight of the poor, including older people   |
| <b>2009</b>           | Provision on social pensions rejected by the House of Representatives<br>COSE expands advocacy efforts to the regional and local level<br>COSE provide information to, and lobby, the Senate<br>COSE generates media coverage and support for the campaign<br>High profile people speak out in support of the campaign |
| <b>Jan 2010</b>       | Senate approves draft bill, including provision for social pensions<br>Further media coverage and two rallies in front of the President's Palace   |
| <b>Feb 2010</b>       | The President of the Philippines approves the final bill, the expanded Senior Citizen Act of 2010  |
| <b>Apr 2013</b>       | Philippines Government doubles the 2014 budget for social pensions to \$75million USD  |

## **Plan ahead and identify allies**

COSE developed a three year social pension advocacy work plan for 2007-2009. The plan specified COSE's direction and strategies to intensify advocacy on social pensions, building on the momentum from the regional seminar, which government officials such as the Secretary Assistant of the DSWD had attended.

The plan encompassed the Confederation of Older People's Associations in the Philippines (COPAP), engagement with key relevant agencies and parliamentarians, working with media, further building the capacity of the team, as well as enhancing COSE's relationship with donors who are supportive of using social pensions as a tool to address poverty among older people.

## **Identify policy asks**

Between January and June 2007 COSE, in consultation with COPAP and other individuals who supported social pensions (including the former director of the DSWD and DSWD staff), drafted a social pension bill. Although COSE was convinced the universal scheme was a better approach, the bill proposed a means-tested scheme because feedback from supporters – parliamentarians and the country's financial situation indicated it would be more realistic way to start.

## **Raise awareness of the issue**

COSE was successful in advocating for the DSWD to agree to initiate a pilot social pension scheme in three of the poorest provinces. Although the pilot scheme was never realised due to lack of political will and budget constraints, it made the idea about having social pensions for the poorest seem more credible and possible.

## **Work with politician and understand political processes**

In October 2007, COSE identified possible supporters of the bill in the House of Representative (the Lower House of Parliament) and the Senate. COSE approached these people to support the bill.

Knowing that the bill would be reviewed by the Population and Family Relations Committee in the House of Representatives, COSE worked closely with COPAP and lobbied individual committee members, liaised with the committee staff, mobilised older people to the committee hearing so they could ask questions and express their views, and matched older persons with their local congress members so they could communicate directly with them.

COSE agreed with the proposal to package the bill with other pending bills on ageing issue because a single/independent bill could be more difficult to get approved. This package is known as The Expanded Senior Citizen Act of 2010 (a modification of the Expanded Senior Citizen Act of 2003).

### **Confederation of Older People's Associations in the Philippines (COPAP)**

COPAP is an umbrella organisation of Older People's Associations in the Philippines. This federation was established in 2007 and is accredited by the Department of Social Welfare and Development.

COPAP and COSE work closely to respond to the needs of older people. They have been closely coordinating with various groups, private and government agencies, and local government units at the barangay and city level. Both organisations have also developed fruitful partnerships with the Department of Social Welfare and Development and other national agencies.



### **Use special occasions to highlight issues**

The decision to file the bill in October 2007 was due to the fact that the International Day of Older Persons (IDOP) falls on 1 October. COSE and its supporters used the IDOP to draw the government, media and public's attention to the bill. COSE mobilised 1,500 older people to fill up the gallery of the House of Representatives when the introduction of the bill was read and filed by Representative Eduardo Zialcita.

COSE also linked with HelpAge Global Campaign Age Demands Action (ADA), which uses the IDOP as an opportunity to promote older people's issues and their rights. Since 2008, the ADA campaign in the Philippines has focused on social pensions.

### **Use communication materials to raise awareness**

Producing information, education and communications materials was also useful. This includes posters, leaflets, T-shirts and paper fans with social pension message printed on them.

### **Stay positive and adapt to a shifting landscape**

In 2009, the bill was discussed in the lower house and received strong opposition from some lawmakers arguing that the government could not afford to finance the social pension. Subsequently the provision on social pension was dropped by the House of Representatives. With no provision on social pensions in the Lower House draft, COSE had to lobby the Senate urgently (when a bill is filed, it is normally reviewed by both Houses). In the Senate, the Committee on Peace and Social Justice was assigned to review bills concerned with ageing. COSE and COPAP worked closely with the head of this committee Senator Pia Cayetano.

The Senate requested information on social pensions and COSE drew on its own research and information provided by HelpAge, for example the January 2007 seminar report Social Cash Transfer for Asia: Ensuring social protection/social pensions in old age in the context of rapid ageing.

## **Know what's happening in other countries**

COSE worked closely with the Office of Senator Pia Cayetano to organise forums to discuss the contents of the bill and draw public opinions and support for the bill. COSE and Older people became resource persons at the forum and COSE shared social pension practice from other countries including case studies and documents produced by HelpAge International. For example, poorer countries such as Bangladesh and Nepal already had social pensions in place. These case studies became one of the major arguments to convince the lawmakers. The experience of HelpAge shows that there is a need for a mix of international and national evidence.

## **Let older people speak**

The Committee on Peace and Social Justice also wanted to hear directly from older people themselves to verify the legitimacy of the demands and substantiate evidence for the change. In response to this request, COSE and COPAP organised a forum for older people to express their views. Representatives from COSE and COPAP were resource persons at the forum. To ensure effective presentation and communications, COSE coached the selected speaker prior to the event to equip them with information that was expected to be asked, and to further build their confidence. Ultimately, the social pension was included in the consolidated version of the bill.

## **Work at both the national and local level**

In March 2009, a national consultation on social pensions was organised. One key recommendation from this consultation – from the Department of Interior and Local Government (DILG) – was to expand advocacy efforts to the regional and local level so it would be seen as a national issue, not only a concern of the urban poor. As COSE's strongest area was in urban areas of Manila it was previously perceived as not presenting the voice of older people in rural areas. This led to a series of local consultations in different regions. HelpAge provide support to this process through an IFKO funded project from June 2009 to February 2011, including supporting the participation of older people in an awareness raising events in December 2009 and early 2010 that pushed for the approval of the social pension scheme and the implementation of the bill after its approval.

Feedback from the consultations was used to support national advocacy. In addition, some local governments started using the one per cent allocation of internal revenue that the law states must be used for providing welfare for older people, to provide social pensions to older people in their areas. Some local government units approved an ordinance to initiate the scheme. This change created interest and discussions on social pension issues at the local level.

## **Turn crises into opportunities**

In late September 2009, Typhoon Ketsana struck the Philippines. Although this affected millions of people, it had a positive impact on the campaign as it helped highlight the plight of the poor, including older people.

## **Work with the media and other networks**

The Network for Transformative Social Protection in Asia (NTSP) is a network of civil society organisations promoting social protection, based in Manila. During the campaign for the bill's approval in late 2009 and early 2010, NTSP actively supported COSE's use of the media to support the campaign. The forum liaised with and mobilised media through their connections, organised interviews with COSE and older people and wrote articles and news stories to support the advocacy, particularly at crucial times.

## **Maintain pressure**

During the Senate hearing process, COSE and COPAP continued to lobby and monitor the progress by attending the hearings and mobilising older people to attend. This was important because at the hearings, people who attend can ask questions and comment on the bills being discussed. Individual lobbying also took place. COSE/COPAP approached individual senators to gain their support, matching older people with senators. Befriending and liaising with the senate staff was also important as they can provide information regarding scheduling, access to detailed information on the Senate report, providing insider views and helping to provide access to the senators. Outsiders are not allowed to speak during Senate reading sessions; however, COSE liaised with the Senate lawyers to provide relevant information and feedback.

## **Identify opposition**

On 29 January 2010, the Senate approved the draft bill. But, to make it to law, the President had to sign it. COSE learnt from contacts that the President may oppose the bill because the Ministry of Finance objected to it due to financial concerns. Therefore, that week, COSE mobilised older people and worked with the media (with support from NTSP) to pressure for the President's approval of the bill. After two rallies in front of the President's Palace, the bill was approved on 16 February 2010.

## **Build support among the general public**

At the beginning, nobody thought the social pension would be possible. But the media made the new idea popular. The media work included organising interviews with older people, speaking on the radio, inviting the media to events/rallies, press releases, websites and inviting high profile people (church leaders, senators and MPs) to speak in support of the campaign. It was also useful getting foreigners to write and comment on the issue, to attract further public attention. Utilising support from allies with skills and contacts in the media, such as the NTSP, was valuable.

## **Ongoing cooperation**

After the expanded Senior Citizen Act of 2010 was passed, DSWD indicated that it needed support from COSE and HelpAge in the national consultation process required to implement the Act. COSE, with support from HelpAge, has been providing input specifically on the implementation of social pension section. COSE will continue to monitor how the law is being implemented and develop concrete proposals to improve its implementation.

## Conclusion

The social pension programme is implemented by the DSWD and provides a monthly stipend of P500 (\$12USD). According to DWSD, the priority beneficiaries of the social pension are senior citizens aged over 77 who are frail, unwell and disabled, without a regular source of income or support from their family, and not receiving other pension benefits from government and private agencies.

In April 2013, the Philippines Government decided to double the budget for social pensions in 2014 from 1.5 billion pesos (\$36.4million USD) to 3.1 billion pesos (\$75million USD). COSE welcomes this decision as it means the pension can be expanded to cover a greater number of people.

This experience in the Philippines suggests that the success of a campaign to introduce a social pension depends on a concrete and workable proposal which is in the interest of the people, especially older people. It should be achievable for the government, meaning it supports the development agenda of the country.

The process must be led by older people as the main actor so policy makers and other stakeholders can see that it is genuinely a community led campaign.

International support, especially from the HelpAge Network, added more impetus to the campaign. Government officials were invited to attend workshops, conferences and other regional gatherings. These occasions educated and convinced them of the importance of social pensions and they became active supporters themselves.



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