39. Enabling universal access to the Philippines' social pension programme through better data use and analysis

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Reaching the poorest older people through social pension programmes needs an effective targeting system

In 2011, the Philippines introduced a means-tested social pension. The programme is restricted to older people who have disabilities, are frail or in poor health, who have no regular source of income, no pension and no regular support from family. This has left millions of older Filipinos barred from enrolling in the programme.

Four years after the social pension was launched, an assessment[1] of the programme by HelpAge global network member Coalition of Services of the Elderly (COSE), HelpAge International, and the Demographic Research and Development Foundation found that while the social pension had a meaningful impact on the income and expenditure of recipients, there were still major issues concerning eligibility.

Strict criteria meant that only a person aged 77 or over who was disabled or frail and who had no income or support from family was eligible. A flawed targeting system, which calculated wealth as accumulated household assets, measured whether a person qualified as poor or not. This meant that some of the poorest, oldest people were left out, as the method did not consider current income. And although the criteria were narrow, they were not specific enough to avoid high levels of subjectivity and politicisation, where individuals at the local level were identifying those who were eligible.

A study of additional existing data aims to assess and expand the reach of the Philippines' pension programme

In 2015, COSE and HelpAge International initiated a feasibility study[2] on expanding the current means-tested social pension programme into a universal social pension programme that would ensure no one was left behind. The study found that openly accessible data on older people were scarce. They were not well disaggregated, and often related to only a single age cohort of 60+ or 65+. The statistics were insufficient to effectively study income in later life.

The solution was to use existing datasets and mine them further. The Coalition of Services of the Elderly and HelpAge purchased national datasets from the Government of the Philippines, and local and international experts were commissioned to produce and analyse a more detailed dataset disaggregated at intersections of age, gender, disability and location.

The analysis revealed that:

- More than 70% of older people do not receive a contributory pension, and benefits are particularly low for women.
- The employment rate for older people falls sharply after the age of 60, primarily due to ill health and, for women, family responsibilities.
- Most older people cannot depend on their adult children as their main source of support; the adequacy and regularity of financial assistance from children is limited.

By making the pension programme universal, the Government of the Philippines could:

- Reduce the national poverty rate by up to 3 percentage points (a 9% reduction).
- Lift over 3 million Filipinos out of poverty.
- Have greater impact than that achieved through a means-tested scheme.
- Have an immediate impact on reducing levels of inequality.

HelpAge and COSE took these findings and designed a campaign on universal social pensions to inform and build public support using, for example, an infographic[3] and a video.[4] The Coalition of Services of the Elderly identified champions within the Congress of the Philippines who were committed to amending the current policy. It worked closely with these Congress members to draft a bill that supports all older people without contributory pensions. This was filed on 15 February 2017, and by February 2018 140 representatives signed up as co-authors and a technical working group was created to further develop the bill.

Existing datasets can be improved, analysed and used as a basis for better policy making

The research carried out by COSE and HelpAge shows that experiences of ageing are diverse and that there are inequalities within older populations. In promoting a more inclusive pension policy, the two organisations have argued that data must be granular - it should not be reported as a single age cohort of 60+, as circumstances differ hugely as people age. Data need to be disaggregated in five-year bands and at intersections of age, gender, disability, and location.

Experience so far shows that it is possible to make better use of existing datasets by analysing them further, ensuring open access to data, and having commitment and resources to undertake the research and publish it. Various stakeholders, such as national statistical offices, decision makers, media, civil society and older people, can and should work together to ensure evidence is used in policy and advocacy, and in empowering older people.

What next?

While the Philippines' bill on a universal pensions scheme is expected to be passed by the end of 2019, the advocacy, data and evidence shaping the policy change are having an impact now. In particular, they were instrumental in informing the design of the recently signed tax reform law, which includes pensioners as beneficiaries of the tax reform subsidy.[5]

Lobbying with Congress and the Department of Social Welfare and Development has led to 200 000 additional people being added to the social pension programme in 2018, bringing the total to 3 million. In addition, the proposed pension amount has doubled to 1 000 Philippine pesos (USD 19).

Notes

[1] http://www.helpage.org/download/56e195e41b33a.

[2] http://www.helpage.org/download/58a47ac164722.

[3] http://www.helpage.org/download/58c13ef520223.

[4] https://www.youtube.com/watch?v=pfSgShvyeF0&t=13s.

[5] https://www.rappler.com/nation/193668-philippines-poor-families-tax-reform-subsidy-january-2018.

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