Citizenship or Charity: the two paradigms of social protection

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While there is a widespread assumption that social protection is a ‘good thing’ – given the extensive evidence on its positive impacts – this is not always the case. Anyone reading the demonization of so-called ‘welfare cheats’ in the UK’s press would appreciate that certain types of social protection programme are often very unpopular (or look at the recent film by Ken Loach: I, Daniel Blake). And, it is also well-known that particular types of social protection programme can cause harm: witness the negative impacts on beneficiaries of workfare in Ethiopia – the so-called Productive Safety Net Programme – the workhouse in 19th Century England (think Oliver Twist), the harm caused by punitive conditional cash transfer (CCT) programmes (see here and here) and the damage caused to persons with disabilities by the introduction of conditionalities and sanctions into disability benefits.

A helpful way of predicting the likely impact and political reception of schemes is to examine the two very different paradigms within which those building social protection systems operate. On the one hand is a CITIZENSHIP paradigm, which emanates from an understanding that social security is a right for all citizens; and, on the other is a CHARITY paradigm, which conceptualises social protection as handouts to ‘the poor.’ Indeed, the debates we often hear on, for example, levels of financing, targeting, the use of conditions or the value of workfare are, in reality, debates about the pros and cons of these two paradigms.

So, what is the difference between these paradigms?

The CITIZENSHIP paradigm is characterised by inclusive, lifecycle social protection systems. These systems are built – as Figure 1 indicates – mainly around conventional social security programmes such as old age, disability, child and unemployment transfer schemes, indeed the type of social protection system that we find in most high-income countries. Within the Citizenship paradigm, social protection schemes are accessible to all citizens – understood here as all those legally resident in a country or ‘rights-holders’ – and offer universal or, at the very least, high coverage. The level of investment in these systems and schemes tends to be high, as are the transfer values. Those operating within the Citizenship paradigm recognise the value of higher levels of taxation and understand that redistribution is a public good, resulting in more cohesive societies, a stronger social contract and more inclusive and sustainable economic growth. Most high-income countries follow the Citizenship paradigm, spending on average around 12 per cent of GDP in lifecycle social protection schemes, with most of this investment in inclusive programmes. The Citizenship paradigm also underpins the concept of the Social Protection Floor. A range of low- and middle-income countries are moving towards a Citizenship paradigm: for example, South Africa, Brazil, Namibia, Mongolia, Georgia and Nepal (among others) are gradually building a set of inclusive, lifecycle schemes although, in each, gaps still remain.
The CHARITY paradigm is very different. It is similar to the type of social protection system that characterised some European countries in the 18th and 19th Centuries. England’s Poor Laws are a classic example. Social protection was offered to the ‘extreme poor’ who came to be seen as either ‘deserving’ or ‘undeserving’ (the ‘deserving’ poor being those unable to work – and, therefore, poor through no fault of their own – while the ‘undeserving’ poor were those with labour capacity and, therefore, regarded as inherently lazy). So, while, in the early 19th Century, all the ‘poor’ were given unconditional benefits, as time passed, benefits for the ‘undeserving’ poor were made conditional on work so that they were not seen as handouts (such as England’s demeaning and harmful workhouse, described by Charles Dickens in his classic novel Oliver Twist).

Figure 1: A simple depiction of a lifecycle social protection system

Figure 2: A summary of the differences between the Citizenship and Charity paradigms

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The most prominent current manifestation of the Charity paradigm in low and middle-income countries is the many household-based poverty-targeted schemes that have arisen over the past 20 years as the basis of national social protection systems (for example: Malawi’s Social Cash Transfer; Nigeria’s conditional cash transfer; Mexico’s Prospera; Jamaica’s PATH; and the Philippines’ Pantawid, among others). While some Charity schemes – such as Pakistan’s Benazir Income Support Programme (BISP) – have been unconditional, others, such as many Conditional Cash Transfers (CCTs), use sanctions to control the behaviour of beneficiaries. Alternatively, following the model of England’s Poor Laws, some countries have introduced workfare programmes (such as in Ethiopia’s Productive Safety Net Programme, Rwanda’s VUP and Tanzania’s TASAF). The use of conditions with sanctions and workfare is, as in 19th Century Europe, embedded in the belief that the working age ‘poor’ are ‘undeserving’ and therefore must be obliged to do something to receive their benefit. Some workfare schemes – such as Ethiopia’s PSNP and Rwanda’s VUP – have parallel ‘direct support’ schemes that offer unconditional transfers to the so-called ‘deserving poor’ (in other words, those believed to be without the capacity to work), again following the 19th Century model.

Programmes within the Charity paradigm are best understood as traditional ‘poor relief,’ although advocates often refer to them as social assistance or social safety nets.

In contrast to the Citizenship paradigm, the budgets and transfer values of programmes within the Charity paradigm are low. Figure 3, for example, compares the budgets of the largest inclusive social pension schemes with the biggest poor relief schemes across low and middle-income countries. The pensions are significantly larger: there are many social pensions that demand investments of over one per cent of GDP while most poor relief schemes cost less than 0.4 per cent of GDP (around the size of the smallest inclusive pensions). Inclusive pensions also have much higher transfer values than poor relief schemes. Another good example of a Citizenship benefit is Mongolia’s inclusive Child Money scheme which is offered to every child up to 18 years of age at a cost of 1.4 per cent of GDP (more than three times the size of well-known poor relief schemes such as Brazil’s Bolsa Familia, Mexico’s Prospera and the Philippines’ Pantawid). The two largest poor relief schemes are anomalies: Ethiopia’s Productive Safety Net is not even funded by the Government of Ethiopia, but by donors (demonstrating minimal commitment by the Government of Ethiopia); and, Georgia’s Targeted Social Assistance programme is less than a quarter the size of the country’s pension and is gradually being transformed into a more inclusive Child Benefit.

Figure 3: Levels of investment in the ten highest spending tax-financed inclusive pensions and poor relief schemes

![Figure 3: Levels of investment in the ten highest spending tax-financed inclusive pensions and poor relief schemes](image)

2 While the BISP was initially unconditional, it is gradually, under the direction of the World Bank, introducing conditions and sanctions.

When national levels of expenditure are compared, an even greater discrepancy between the two paradigms appears. A range of middle income countries are already investing more than 3 per cent of GDP in social protection systems that are moving towards a Citizenship paradigm, including Brazil, South Africa, Mauritius, Georgia and Uzbekistan. In contrast, in countries where the Charity paradigm dominates, spending on poor relief schemes is, as indicated above, usually less than 0.5 per cent of GDP (e.g. Colombia, Peru, Pakistan, Philippines, Indonesia, Vietnam, Malawi, Nigeria and Tanzania among many others).

So, who are the supporters of the different paradigms?

It would be a mistake to think that the Citizenship/Charity dichotomy is embedded within a simple right/left ideological split. Many countries with right-wing governments strongly support national social protection systems that use a Citizenship paradigm as their basis: across high-income countries, there is little opposition from those on the right of the political spectrum to funding inclusive core social protection schemes (in particular, old age pensions, child benefits and disability benefits), while Poland’s right-wing government recently introduced a universal child benefit. Nonetheless, it is true that, when budget cuts need to be made, right-wing governments often attack social protection programmes for the ‘poor,’ in line with a neoliberal ideology (although, within high-income countries, such schemes comprise a small proportion of national investment in cash-based social protection). For example, as part of its austerity programme, the Conservative party in the United Kingdom has spent the last seven years in Government undermining ‘welfare’ benefits for the ‘poor,’ reducing their budgets, the value of transfers and expanding conditions and sanctions. However, at the same time, the party strengthened the UK’s inclusive old age pension system, increasing the value of this particular transfer and making it universal.

Instead, the main driver distinguishing the different paradigms is democracy. European 18th and 19th Century poor relief began under authoritarian regimes but, as democracy strengthened, it was gradually replaced by inclusive lifecycle schemes, with the majority of citizens – including the main taxpayers – demanding social protection schemes from which they would also benefit. They opposed paying for poor relief from their taxes, since they were excluded from it. Politicians also began to understand that, by offering inclusive schemes based on citizenship, they could win elections and, over time – and, in particular, after the Second World War – across high-income countries the level of investment in social protection expanded significantly, bringing with it major economic, social and political benefits.

Over recent decades – and as happened in 18th and 19th Century Europe – the Charity paradigm has been introduced as the basis of national social protection systems within low and middle-income countries that are either authoritarian or have young or weak democracies. This was initially linked to the push for structural adjustment within the Washington Consensus and a desire to offer ‘social safety nets’ for those most affected by reforms and the same thinking has continued. For example, in Latin America and Asia, many Conditional Cash Transfers arose following the fall of authoritarian regimes, when democracy was still immature (for example, in Mexico, Ecuador, the Philippines and Pakistan) while China introduced its Minimum Living Standards Scheme for the ‘poor’ in the late 1990s. Nonetheless, as democracy has strengthened in low- and middle-income countries, many have begun to move towards a Citizenship paradigm: for example, Ecuador’s Bono de Desarrollo Humano poor relief programme is gradually being replaced by old age pensions and disability benefits (see Figure 4); Mexico has introduced an inclusive old age pension to complement the Prospera poor relief scheme; and, Zambia is gradually moving from household-based poor relief to a system of inclusive old age and disability benefits (although it still needs to take the final steps).
Kenya is an interesting example of a country currently undergoing the transition from a Charity to a Citizenship paradigm. Tax-financed social protection schemes were first introduced in Kenya in 2004 and have grown over time so that, by 2016, they reached around 1 million recipients. Although most of Kenya’s schemes were, to a certain extent, following a lifecycle approach, they were still essentially operating within a Charity paradigm, since households could only receive one benefit and all programmes were targeted at those living in extreme poverty. Yet, while social protection was expanding, democracy was also strengthening. As a result, prior to the first 2017 Presidential election, Kenya made its first significant step towards the Citizenship paradigm when the government announced a social pension for all citizens, which can be accessed on reaching 70 years of age (over 800,000 in total). In response, the opposition promised to reduce the age of eligibility to 65 years and increase the value of the transfer. As in high-income countries, key Kenyan policy-makers have realised that success in politics depends on a classic win-win: while they win elections and power, their citizens win by accessing and benefiting from inclusive social programmes.

Unfortunately, international agencies and donors often work against the democratic imperative and oppose moves towards a Citizenship paradigm. It is remarkable that, over the past two decades, almost all of the inclusive schemes introduced in low- and middle-income countries have been driven by governments acting alone, without the support of international agencies and donors (think, for example, of the inclusive pensions in Nepal, Lesotho, Bolivia and Georgia as well as Mongolia’s Child Money scheme). In contrast, most poor relief schemes have been either initiated or supported by international agencies and donors. For example, Nigeria’s recent introduction of a CCT has been backed by a World Bank loan while the United Kingdom and the World Bank finance Pakistan’s Benazir Income Support Programme, a classic poor relief scheme.

\[4\] Source: Administrative data
Indeed, when poor relief programmes are funded by donors, governments find that they are accountable to the donors rather than to their citizens. As a result, they can struggle to move towards a Citizenship model. Often, the advice they receive from international agencies and donors is problematic and not based on evidence, deliberately playing down the benefits of inclusive schemes while hiding the many disadvantages of poor relief. Witness the World Bank’s claim that the proxy means test rationing mechanism is able to ‘accurately and cost effectively target the chronic poor’ when, in reality, exclusion errors are usually at least 50 per cent; or, that Social Registries are ‘inclusion systems’ when their main effect is to exclude a high proportion of those living in extreme poverty from all social programmes.

So, in many countries, we find that social protection systems have become battlefields between democratically elected governments implementing the Citizenship paradigm and international agencies and donors actively attempting to undermine inclusive schemes while promoting poor relief (in effect, an attack on democracy and the will of the people). There are many examples. In recent years, both Mongolia and Nepal have faced lobbying – and, indeed, threats – from international agencies seeking to dismantle their Citizenship-based social protection schemes and move to a Charity paradigm. So far, they have managed to resist. In Namibia, the World Bank has recently proposed that the country’s successful universal old age and disability benefits should be targeted at the ‘poor’ using, bizarrely, a proxy means test. And, in Mozambique, the World Bank is opposing the Government’s decision to move to an inclusive social protection system, again promoting targeting and the proxy means test as the alternative. Many democratically elected governments know that, if they were to listen to donors and move away from a Citizenship paradigm, they are likely to lose the next election, as happened in Mauritius in 2004, when the government followed external advice and means-tested its inclusive pension. One of the first acts of the winner of the 2005 election was to restore the universality of the pension.

So, which approach is the most effective?

This is an easy question to answer. The Citizenship paradigm, with its higher coverage and transfer values, easily outperforms the Charity paradigm across all aspects of social, economic and political impacts. The poor relief schemes of the Charity paradigm fulfil Sen’s (1995) argument that ‘benefits meant exclusively for the poor often end up being poor benefits.’ As shown elsewhere, in almost all cases, the majority of intended recipients of poor relief are excluded from the programmes, often through the use of poor quality and arbitrary rationing mechanisms such as the proxy means test or community based targeting. In contrast, the exclusion errors in many inclusive schemes are almost zero (in Georgia’s universal old age...
pension, for example, only 2 per cent of intended beneficiaries are excluded). Furthermore, poor relief schemes often generate stigma, increase conflict within communities and create perverse incentives (such as discouraging people from working), while inclusive schemes receive strong popular support, since they are accessible by all citizens once they qualify. For example, universal pensions are not just for the elderly, but for all citizens of a country, who access them once they reach the age of eligibility.

The combination of high levels of exclusion and lower transfer values within poor relief schemes mean that their impacts on the wellbeing of citizens, including those living in poverty, are less than those of inclusive schemes. It is no coincidence that 75 per cent of the impact of Georgia’s national social protection system on child poverty derives from its universal pension rather than its Targeted Social Assistance poor relief programme. Figure 5 compares the Philippines’ Pantawid poor relief scheme with the more inclusive social protection systems of South Africa and Georgia, examining the impacts on poverty across different age groups. The Pantawid scheme has minimal impact on the poverty rate while, across all age groups, significant reductions are achieved in Georgia and South Africa. The main explanation of the differences in impact is the level of investment: while the Philippines invests less than 0.4 per cent of GDP, investment is above three per cent of GDP in South Africa and around six per cent in Georgia.

Figure 5: Impacts on poverty across age groups comparing the Charity approach in the Philippines and a growing Citizenship approach in Georgia and South Africa

In these diagrams, the top line shows what the poverty rate would be for each age group without the schemes; the top of the grey area shows the poverty rate as a result of the schemes. Furthermore, the impacts of individual schemes are shown.
Of course, as indicated by Figure 5, the Citizenship paradigm is more expensive than the Charity paradigm. But, as any car dealer will tell you, you get what you pay for. So, as Figure 6 demonstrates, if countries want a high quality, Rolls-Royce social protection system that contributes to building a successful and sustainable economy while strengthening social cohesion, tackling inequality and offering dignity and income security to all citizens, they need to be willing to invest. If countries are only willing to pay for a second-hand Lada social protection system, then they should not complain if it is neither effective nor popular. Of course, building a Rolls-Royce system is unlikely to be achieved overnight but, over time, countries can aim to increase their investment and gradually improve the quality of their social protection systems. It is important to bear in mind that high-income countries took many decades to build their systems. Nonetheless, even with an investment of as little as one per cent of GDP, almost all countries can establish inclusive old age pensions, disability benefits and benefits for young children.

Figure 6: The choice facing countries: effective or ineffective social protection

But, is this such a simple dichotomy? As the discussion above suggests, the two paradigms are not a simple dichotomy. Rather, they should be envisaged as a continuum, with countries transitioning over time from the Charity to Citizenship paradigm, as their democracies strengthen. So, Pakistan and Nigeria, with their reliance on poor relief, continue to be firmly within the Charity paradigm; in contrast, countries like Nepal, Ecuador, Mauritius, South Africa and, now, Kenya – with their inclusive, lifecycle schemes – have one foot firmly within the Citizenship paradigm.

Just because countries have lifecycle schemes, it does not mean that they are within the Citizenship paradigm. India and Bangladesh, for example, have a range of lifecycle schemes but, rather than offering them to all citizens, they have designed them within the Charity paradigm, targeting them, unsuccessfully, at those living in extreme poverty. India’s use of Poverty Cards and Bangladesh’s recent adoption of the proxy means test – at the instigation of the World Bank – show that they still have a long way to go before they enter the Citizenship paradigm. Nonetheless, once their politicians realise that inclusive schemes will deliver electoral success, this will rapidly change.

As indicated earlier, the dichotomy is clearer when examining the approaches of social protection specialists. Some clearly sit within the Citizenship paradigm, recognising that social security is a basic human right for all. They objectively set out the evidence of different approaches while explaining to countries that if they want a successful and effective social protection system, they have to be willing to invest. Others, within the Charity paradigm, promote a neoliberal ideology of low taxes and low social spending and have created
a range of myths to justify their beliefs (such as the myths that *Bolsa Familia is Brazil’s largest and most effective scheme (see Box 2)*; ‘targeting the poor is good for the poor;’ ‘poverty targeting can be done accurately; ‘Graduation’ programmes are cost-effective; conditions and sanctions add value to social protection programmes; and poverty targeting is more effective in tackling inequality and poverty than universal schemes). However, there is a group of people working in international development who regard themselves as progressive but inadvertently follow the Charity paradigm by falling into the trap of believing the myth that targeting the ‘poor’ is good for the ‘poor’ or are convinced that ‘there is no fiscal space’ *(that oft-repeated phrase for which there is rarely any basis in fact)*.

**Box 2: The myth of Bolsa unFamiliar**

Advocates of the Charity approach have, in recent years, created a myth around Brazil’s Bolsa Familia poor relief scheme. They have created an image of Bolsa Familia as the largest and most effective social protection programmes in Brazil. In reality, it is a small programme costing only 0.4 per cent of GDP compared to Brazil’s overall investment of around 12 per cent of GDP in social protection (and it is not particularly popular with the main taxpayers). Indeed, the largest impacts on poverty and inequality in Brazil are from the other much bigger schemes (see this paper for more information). In reality, Brazil has moved a long way towards a Citizenship system and is very different to the image of a country committed to poor relief that is promoted by advocates of the Charity paradigm.

**So, what do we need to do?**

This is where we have to direct ourselves to the World Bank and the IMF – and any donors financing their social protection work – since they are the main proponents of poor relief (or, as they say, ‘social safety nets’):

‘Please think about what you’re doing. Your promotion of the Charity paradigm and your continuing opposition to countries choosing to follow a Citizenship model are harming national economies while damaging the lives of hundreds of millions of people. Can you please examine the evidence on social protection impartially and objectively and consider whether your promotion of rationing, sanctions, low investment and poor quality poor relief programmes is really the most effective means of helping countries achieve social, economic and political success? You are not meant to be advocacy institutions so please stop undertaking advocacy. We would all be much happier if you were to provide impartial, evidence-based and ideology-free advice while no longer publishing propaganda dressed up as research, such as this paper by Acosta, Leite and Rigolini. If you need further training to understand the pros and cons of the Citizenship and Charity paradigms we, the ILO, and many other progressive institutions are happy to help you out. You just need to ask…..’
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About The Author
Stephen Kidd
Stephen Kidd is a Senior Social Policy Specialist at Development Pathways. As a citizen of the UK, he trusts that the advocates of poor relief won’t take away his entitlement to the state pension before he retires. So, clearly, there’s a lot of self-interest in this paper.

For more information please feel free to get in touch, our contact details are below: