

Evidence Review

Social protection in the Pacific and Timor-Leste

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Partnerships for Social Protection (P4SP) contributes to greater coverage of quality, sustainable social protection systems in Pacific Island Countries and Timor-Leste, that reduce poverty and exclusion, address vulnerabilities through the life-course, and stimulate economic growth.

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List of abbreviations

ADB	Asian Development Bank
AusAID	Australian Agency for International Development
DFAT	Australian Department of Foreign Affairs and Trade
GDP	gross domestic product
GEDSI	Gender equality, disability and social inclusion
GNI	gross national income
ILO	International Labour Organization
NGO	non-government organisation
PICs	Pacific Island countries
P4SP	Partnerships for Social Protection
SOGIESC	sexual orientation, gender identity, gender expression and sex characteristics
SPI	Social Protection Index/Indicator
UN	United Nations
UNDP	United Nations Development Programme
UN ESCAP	United Nations Economic and Social Commission for Asia and the Pacific
UNICEF	United Nations International Children's Emergency Fund
UN Women	United Nations Entity for Gender Equality and the Empowerment of Women

Executive summary

Social protection is a key mechanism that governments and other actors use to support the most vulnerable people and those experiencing life-cycle shocks. In its many forms, social protection not only provides for basic needs but also has larger-scale impacts in reducing poverty, addressing societal inequalities, protecting livelihoods, and building resilience to climate and other shocks.

Social protection is provided through both formal pathways (such as government-led schemes) and informal pathways (such as traditional networks of reciprocal familial and community support or support from faith-based institutions). While informal pathways have not always been described as 'social protection', these networks are vital in societies across the Pacific and Timor-Leste.

While the value of social protection is increasingly recognised in the Pacific and Timor-Leste, the body of evidence available on it appears to be limited compared to other regions. In response to this, the Partnerships for Social Protection (P4SP) program commissioned a review of the evidence on social protection in the Pacific and Timor-Leste.

This review provides an overview of the available evidence on social protection in the Pacific and Timor-Leste. It establishes a foundation for P4SP's overall research agenda and informs program activities, contributing to the social protection research agenda in the Pacific and Timor-Leste and informing social protection policy, programming and advocacy in the region.

We review evidence from a comprehensive search of published literature on social protection in the Pacific and Timor-Leste. We scanned the evidence across Google Scholar and 27 organisational and repository websites, using an iterative search process developed in consultation with the P4SP team. Relevant documents were identified, summarised and tagged according to geographic and thematic content. After screening 7,136 documents for relevance and duplication, we identified 242 as suitable to include.

The outputs of the evidence scan and summaries of the 242 relevant documents are detailed in the companion *Annotated Bibliography* document.

Key findings

Our key findings from the evidence review, outlined in this section, identify research gaps and recommend areas for future research.

Understandings of social protection in the Pacific and Timor-Leste

- **Definitions of social protection vary widely**, globally as well as within the Pacific and Timor-Leste. However, these definitions broadly agree that social protection includes programs that protect vulnerable population groups from negative impacts and pursue positive societal changes for the people in these groups.
- **Social protection is broadly agreed to include social assistance (non-contributory programs) and social insurance (contributory programs).**

- **Common differences in social protection definitions** relate to whether they include or exclude the following: labour market programs, informal and traditional support networks, non-state interventions (such as, non-government organisation assistance) and other social policies (such as, universal health coverage).
- **Definitions of social protection and the terminology used typically reflect the priorities or focus areas of the author or organisation.**

Synthesis of evidence

- **Formal social protection systems in the Pacific and Timor-Leste are relatively underdeveloped and highly variable across the region but spending is increasing.** Although social insurance is still the predominant social protection instrument, spending on social assistance programs is increasing at a faster rate.
- **Social protection across the Pacific and Timor-Leste has low coverage of those outside the formal workforce,** largely due to the predominance of social insurance (particularly, contributory pensions). Social assistance (non-contributory) programs generally offer greater coverage of intended beneficiaries¹ than social insurance programs but both forms of social protection are important in the region.
- **Social protection as an essential shock response mechanism is more evident** in the wake of the COVID-19 pandemic and the impacts of climate change. This may be the ‘tipping point’ for increased social protection in the Pacific and Timor-Leste.
- **Informal social protection systems continue to be a vital component of support structures across the Pacific and Timor-Leste.** Despite some evidence that these informal systems are weakening and overburdened, they continue to contribute to resilience to acute shocks. The need to understand the intersections between formal and informal social protection systems is becoming more evident.
- **Gender equality, disability and social inclusion (GEDSI) considerations are highly relevant to social protection.** While gender-responsive social protection is still limited, awareness of the gendered components of social protection is increasing. Disability and age-inclusive approaches to social protection are more prevalent but coverage needs to be improved. Evidence about the inclusion of people with diverse sexual orientation, gender identity and expression, and sex characteristics (SOGIESC) in social protection systems is limited but examples (Edge Effect, 2021; The Asia Foundation, 2020) suggest that often they cannot access formal social protection.
- **The evidence on the state of social protection in the Pacific and Timor-Leste broadly aligns with the global evidence.** We see similar trends in: the geographic variability of social protection expenditure; the focus on social protection following the COVID-19 pandemic; the predominance of social insurance; the need to understand how the formal and informal social protection systems intersect; and the recognition that GEDSI components need more consideration.

¹ Intended beneficiaries are defined as the share of the population that qualifies for benefits from a particular social protection category or program.

- **Perceptions of social protection raised in the global literature are acknowledged in the literature from the Pacific and Timor-Leste but the evidence is limited.** Meanwhile the evidence to refute or support these perceptions is also limited and patchy, varying between contexts, and cannot be considered representative. This is a key area for future research.

Key voices on social protection

- **‘External’ voices and perspectives dominate the literature on social protection in the Pacific and Timor-Leste**, particularly those of multilateral organisations (United Nations agencies, the Asian Development Bank and the World Bank).² A small proportion of publications that surfaced in our review were authored by Pacific governments, organisations or individuals.
- **Multilateral organisations tend to focus on formal social protection systems** and particularly on assessing their effectiveness, although with some acknowledgement of informal social protection systems.
- **Pacific organisations and authors are more likely to acknowledge and discuss informal social protection** and recognise its importance but not to the exclusion of formal social protection measures.
- **The Pacific and Timor-Leste’s exposure to natural hazards and climate change is a concern in all the literature.** Multilateral organisations are more likely to highlight the need for formal social protection measures to be climate-resilient whereas Pacific organisations and authors are more likely to emphasise the role of pre-existing informal social protection mechanisms in shock response.
- **Authors in all categories emphasise the issue of social inclusion in social protection**, with multilateral organisations stressing gender disparities and the need for gender-responsive social protection.

Research gaps for social protection in the Pacific and Timor-Leste

- **Geographic coverage in the published evidence is highly variable.** Pacific and Asia-Pacific regional-level analysis is common but sub-regional coverage is dominated by Melanesia, with less coverage of Polynesia and Micronesia. At the country level, Fiji, Vanuatu and Timor-Leste have the most coverage. Meanwhile, some Pacific Island countries and territories are hardly covered in the literature, particularly: American Samoa, French Polynesia, Guam, Northern Mariana Islands, New Caledonia, and Wallis and Futuna (this may reflect the exclusion of non-English publications in the case of the French-speaking Pacific). **These variations may reflect several factors**, including: the level of investment and programming on social protection in that country; the presence of overseas development assistance (ODA) programs; and the disaster risk level.
- **Social protection programs relating to the labour market receive the least attention in the evidence.** Social assistance receives by far the greatest attention in the literature, followed

² While Timor-Leste and Pacific countries are often members of these multilateral organisations, these publications still represent largely ‘external’ voices because the program and research agendas of these organisations are unlikely to be driven by Pacific or Timor-Leste perspectives and actors.

by social insurance. Informal social protection is also well represented in the literature, with coverage at the same level as social insurance.

- **The cross-cutting themes³ of climate-resilient social protection and humanitarian assistance has the least coverage in the evidence.**⁴ The literature focuses on shock-responsive social protection, gender and other social inclusion issues (such as, age, diverse ethnicities and diverse sexual orientation, gender identity and expression, and sex characteristics). This aligns with government and development partner policies that pay greater attention to these areas.
- **Discussions of cross-cutting themes tend to focus on challenges** or the need to expand or strengthen these kinds of social protection, rather than on sharing good practices or evidence on the effectiveness of existing policies. This area needs further research.

Implications and recommendations for future research

Through the review we identified various areas that need further attention and research. This resulted in the following set of nine (unranked) recommendations for future research regarding social protection in the Pacific and Timor-Leste:

1. Strongly support Pacific and Timor-Leste authors and organisations in contributing to evidence and discourse on social protection in the region.
2. Support research to understand the impacts and change pathways of social protection, to identify ways of improving coverage for people outside the formal workforce.
3. Support research to better understand informal systems of social protection and how they interact with formal social protection systems within the Pacific and Timor-Leste.
4. Build the evidence base on how social protection systems can affect intra-household dynamics and how to design programs that are gender-responsive, disability-inclusive and socially inclusive.
5. Investigate the economic return on investment in social protection systems to better understand their benefits in relation to their costs for governments in the Pacific and Timor-Leste.
6. Support research to understand the relationship between climate change and social protection in the Pacific and Timor-Leste.
7. Support research to establish how far common global perceptions about social protection apply in the Pacific and Timor-Leste and to unearth additional perceptions not yet identified in the literature.

³ Cross-cutting themes refers to issues and topics that are likely to be of interest to people in the social protection space and are commonly discussed in the literature (climate change, gender, disability and social inclusion).

⁴ In this report and in the *Annotated Bibliography*, humanitarian assistance is defined primarily in relation to support provided by non-state actors (such as, cash transfers from Save the Children in response to the COVID-19 pandemic and natural disasters) rather than by government programs.

8. Support research and evaluation of the social protection responses to the COVID-19 pandemic within the Pacific and Timor-Leste to draw out the lessons learned for longer-term social protection systems in the region.
9. Identify opportunities for learning between countries within the Pacific and Timor-Leste on how to enhance and support social protection systems, cognisant of the interaction between the formal and informal systems.

1 Introduction

This introduction provides the background to social protection in the Pacific and Timor-Leste and sets out the context of this study. We also outline the purpose and objectives of the study and explain the structure of this report.

1.1 Background

Social protection is a key mechanism that governments and other actors use to support the most vulnerable people and those experiencing life-cycle shocks. The many forms of social protection not only provide for basic needs but also have larger-scale impacts in reducing poverty, addressing societal inequalities, protecting livelihoods, and building resilience to climate change and other shocks (UN ESCAP, 2011, 2015, 2020). Social protection plays a core role in pursuing the Sustainable Development Goals and target 1.3 explicitly identifies the objective to ‘implement nationally appropriate social protection systems and measures for all, including floors, and by 2030 achieve substantial coverage of the poor and the vulnerable’ (ADB, 2018:12). This leads towards the goal of ending poverty. Social protection is provided through both formal pathways (such as government-led schemes) and informal pathways (such as traditional networks of reciprocal familial and community support or support from faith-based institutions). While these informal networks have not always been described as social protection, they are vital in societies across the Pacific and Timor-Leste.

The dual health and economic crises created by the COVID-19 pandemic highlighted the importance of both formal and informal social protection systems in insulating individuals and communities from the worst impacts of these crises, triggering unprecedented social protection programs being implemented across the region (ADB, 2022b; UN ESCAP, 2020). Although these were short-term programs, these temporary actions to strengthen social protection systems may lead to longer-term positive adjustments in shock-responsive social protection, even as the crisis response is scaled back (Save the Children Australia, 2023; UN ESCAP, 2020). Furthermore, the vulnerability of many Pacific countries and territories to the impacts of climate change is now recognised. This has brought their need for social protection measures and their capacity to respond to climate-related shocks and longer-term climate changes to the fore (Costella and Ivaschenko, 2015).

While the value of social protection is increasingly recognised in the Pacific and Timor-Leste, the body of evidence available on it appears to be limited compared to other regions. Given the growing interest and the purportedly underdeveloped state of social protection research in the Pacific region and Timor-Leste, we need to understand how social protection and related concepts are being understood, communicated and discussed. Against this backdrop, the Partnerships for Social Protection (P4SP) program engaged Sustineo to review the available evidence on social protection in the Pacific and Timor-Leste.

1.2 Purpose and objectives

This *Evidence Review* provides a comprehensive overview of the available evidence on social protection in the Pacific and Timor-Leste. It establishes a foundation for P4SP's overall research agenda and informs program activities, contributing to the social protection research agenda in the Pacific and Timor-Leste and informing social protection policy, programming and advocacy in the region.⁵

The objectives of this review are as follows:

1. To provide an overview of the variations in language, terminology and definitions used in relation to social protection;
2. To provide an overview of key organisational and individual voices in the Pacific and Timor-Leste;
3. To identify key debates, trends and challenges related to: policy and programming or operational aspects; social and economic impacts and implications; and gender equality, disability and social inclusion (GEDSI) issues;
4. To identify gaps in the research by topic, geography, program type and other relevant themes;
5. To highlight any significant contrasts to the global evidence base.

This *Evidence Review* serves as a companion document to the extensive *Annotated Bibliography* produced as part of this project. The two documents are complementary as the review analyses the literature that is collated and summarised in the bibliography.

1.3 Report structure

This report is structured to provide a comprehensive understanding of the evidence relating to social protection in the Pacific and Timor-Leste. It is organised into the following sections:

- **Section 1** introduces the **background** to the review.
- **Section 2** outlines the **approach and methodology** including data collection methods, sources and analytical processes.
- **Section 3** focuses on **understanding social protection in the Pacific and Timor-Leste**, describing how individuals and organisations write about it, and how they define and use the key terms.
- **Section 4** provides a **synthesis of evidence**, drawing together common themes, narratives and debates found in the evidence, including a discussion of cross-cutting themes relating to social protection.
- **Section 5** highlights the **key voices on social protection** in the region, both individuals and organisations, who have written extensively and/or prominently on social protection, describing their key arguments and noting points of difference.

⁵ Note that where *Evidence Review* is capitalised, it refers specifically to this report document. Where it is not capitalised we are referring to the overall process of reviewing the evidence which includes the literature scan and the annotated bibliography.

- **Section 6** indicates **research gaps** for social protection in the Pacific and Timor-Leste including by topic or theme, country or sub-region and program type.
- **Section 7** outlines the **implications and recommendations for future research**, considering why the gaps exist, how to address them and making broader recommendations for further research on social protection in the Pacific and Timor-Leste.

2 Approach and methodology

This section provides an overview of the approach and methodology we used for the *Evidence Review*. Details of the methodology for the literature search and screening process, as well as the development of the thematic and geographic tagging system we used for the bibliography are provided in Annex 1 of the *Annotated Bibliography*.

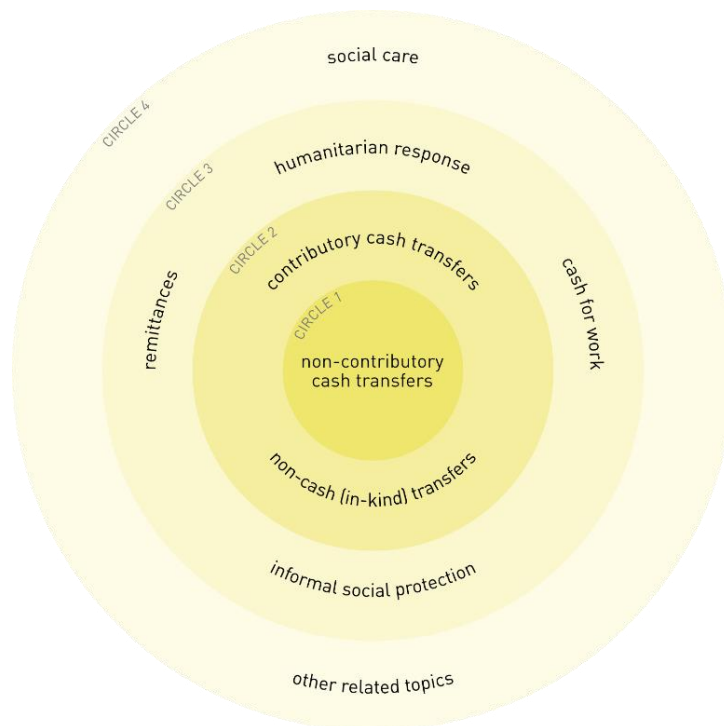
2.1 Design considerations

We designed the *Evidence Review* in close collaboration with the P4SP team to ensure comprehensive (rather than exhaustive) coverage of the available evidence on social protection in the Pacific and Timor-Leste, and aligning with the program’s geographical and thematic focus. We adopted a systematic, iterative approach to the literature search to ensure a balance between effort and reward, and to establish a feasible scope for the process.

Search framework

A key element of our iterative approach was to adopt a search framework that allowed us to prioritise search topics and associated search terms (Figure 1). This framework informed our approach to the Google Scholar search, the primary search we undertook.

Figure 1: Framework for the literature search process



Source: Sustineo (2023)

The geographic scope covered the following set of countries, territories and sub-regions:

- American Samoa
- Cook Islands
- Federated States of Micronesia
- Fiji
- French Polynesia
- Guam
- Kiribati
- Melanesia
- Micronesia
- Nauru
- New Caledonia
- Niue
- Northern Mariana Islands
- Palau
- Papua New Guinea
- Polynesia
- Republic of Marshall Islands
- Samoa
- Solomon Islands
- Timor-Leste
- Tokelau
- Tonga
- Tuvalu
- Vanuatu
- Wallis and Futuna

Literature searches were conducted for all countries, territories and sub-regions for the topics and associated search terms in circles 1 to 3 of the search framework.⁶ We considered documents eligible for inclusion if they: (1) were published by a reputable or influential source; (2) had named authors (individuals or organisations); (3) were written in English; and (4) were published from 2010 onwards.

Cross-cutting themes

In addition to the program-based social protection categories shown in Figure 1, we included cross-cutting themes in the review process. These cover the following issues and topics that are relevant to social protection and commonly discussed in the literature:

- Gender
- Disability
- Other social inclusion (age, people with diverse ethnicities and people with diverse sexual orientation, gender identity and expression and sex characteristics)
- Climate-resilient social protection
- Shock-responsive social protection
- Humanitarian assistance.

⁶ The search process identified an unexpectedly large number of documents, leaving insufficient resources to undertake searches of the circle 4 topics.

2.2 Literature search and screening

We conducted the literature search on Google Scholar and 27 organisational and repository websites, selected in consultation with the P4SP team. The search and screening processes employed different methodologies as outlined in this section.

Google Scholar

Following the prioritised search framework in Figure 1 and filtering for documents issued from 2010 to 2023, we conducted individual searches for all search terms for all countries, territories and sub-regions. We used 55 search terms that aligned with the topics in circles 1 to 3 of the framework. We then screened the first 50 results, except for Fiji and Timor-Leste where we screened the first 60 results, reflecting the expected abundance of literature for these two countries. We screened the results for relevance, initially based on their titles and abstracts, and then based on a full-text review. At each stage, we recorded our inclusion or exclusion decisions based on a set of criteria. Duplicates were filtered out at several stages in the process. A total of 5,461 documents were retrieved and screened, leaving 190 documents at the end of this screening process.

Websites

After the Google Scholar search, we did the website searches, adapting our approach to the diverse nature of the websites and their varying search functionalities. This included employing a uniform general search term – ‘social protection’ – using search filters where available and tailoring our approach to the unique characteristics of each website. Abstracts were not easily accessible on some websites so we created a categorisation system to streamline the process of screening and prioritising results to ensure that the perspectives of Pacific organisations were represented. Given the importance of the socialprotection.org website, we treated it separately and reviewed all relevant materials identified through the website search. In total, we assessed 1,610 documents from the website searches and 124 remained at the end of the screening process.

Additional documents

P4SP, the Australian Department of Foreign Affairs and Trade (DFAT) and other development partners provided additional documents and 50 met the criteria for inclusion in the bibliography.

Results

After screening a total of 7,136 documents and identifying and removing duplicates from the Google Scholar and organisational website searches, we included 242 documents in the bibliography and formed the evidence base for this review.

2.3 Thematic and geographical tagging

We consulted with the P4SP team and expert advisors, and drew on key reference material to develop a systematic tagging system, aligning relevant topics, cross-cutting themes and geographic locations (countries or territories). We applied appropriate tags to each of the 242 documents summarised and presented in alphabetical order (by author) in the *Annotated Bibliography*. We added hyperlinks to all document titles and tags so we could categorise them by theme and geography to make navigating the bibliography more user-friendly.

This tagging system enabled the thematic and geographical analysis and synthesis presented in this *Evidence Review*. We were also able to identify patterns and gaps in coverage in the literature in the bibliography. The lead authors carried out the initial analysis and a panel of three expert advisors reviewed the analysis and made any subsequent revisions.

2.4 Limitations

Several methodological limitations need to be noted, as follows:

- The literature search methodology was comprehensive but not exhaustive due to the need to balance the scope of the search with available resourcing. While Annex 1 in the *Annotated Bibliography* provides sufficient detail to replicate the literature search and screening processes, a certain degree of subjectivity is inevitable in the screening decisions.⁷
- Since we considered only English language resources, gaps are likely in the coverage of the French-speaking Pacific (New Caledonia, French Polynesia, and Wallis and Futuna) and potentially other countries, including Timor-Leste.
- The literature search includes only documents or publications and therefore excludes evidence presented in other formats, such as online databases.⁸
- We originally planned to interview key informants as part of the review process to validate the findings and investigate how key stakeholders in the Pacific and Timor-Leste conceptualise and articulate social protection. However, this was not possible due to the unanticipated volume of documents found during the literature search and the resources required to complete the bibliography. Instead, a panel of three expert advisors peer reviewed and validated an early draft of the *Evidence Review*. At the beginning of the review process, we also discussed the scope and search methodology with Pacific social protection expert, Distinguished Professor Steven Ratuva, and found out more about his own research on social protection in the Pacific. We shared the list of resources in the bibliography with our development partners and invited them to provide additional documents that we may have missed. This resulted in a further 31 documents to be included in the bibliography.

⁷ In addition to following a set of screening criteria, the research team managed this by discussing 'borderline' cases, including with the P4SP team in some instances.

⁸ For example, the [World Bank ASPIRE database](#) was not captured in the literature search.

3 Understanding social protection in the Pacific and Timor-Leste

Section 3: Key findings
Definitions of social protection vary widely – globally as well as within the Pacific and Timor-Leste. At a broad level, these definitions agree that social protection includes programs to protect vulnerable population groups from negative impacts and to pursue positive societal changes for people in these groups.
Social protection is broadly agreed to include social assistance (non-contributory programs) and social insurance (contributory programs).
Common differences in how social protection is defined by different actors are whether they include or exclude: <ul style="list-style-type: none"> • labour market programs • informal and traditional support networks • non-state interventions (such as, non-government organisation assistance) • other social policies (such as, universal health coverage).
Definitions of social protection and the terminology used typically reflect the priorities or focus areas of the author or organisation.

This section describes how social protection is written about in the Pacific and Timor-Leste. We focus on how a range of actors and evidence sources define, use and understand social protection terminology and the associated concepts. In reviewing the evidence we found that the definitions of some terms vary significantly whereas others are applied more consistently. Our aim is not to endorse any specific definitions but rather to explore points of commonality and difference. Where relevant, we indicate the terminology and definition we are using in this report.

Variations in the definition of social protection are common and in some cases they indicate substantial differences in how the term is applied and understood. For example, the glossary on socialprotection.org (n.d. a) provides 18 different definitions of the term ‘social protection’, each from a different organisation.⁹ Across the evidence, some core elements of social protection are broadly accepted while some components commonly differ.

Almost universally recognised in the literature about the Pacific and Timor-Leste is that the core of social protection is about protecting people – particularly those most vulnerable – against negative

⁹ Note that this glossary largely draws from literature written at a global or non-specified scale, rather than sources directly written about the Pacific and Timor-Leste or even the Asia-Pacific region.

impacts in their lives (ADB, 2022b; AusAID, 2012b; ILO, 2021a; World Bank, 2018). Typically, these negative impacts are framed as ‘crises’, ‘shocks’, ‘risks’, ‘poverty’, ‘deprivation’ and ‘social exclusion’. Ratuva (2014) highlights the need to include non-economic risks (such as, gender inequality and domestic violence). In some cases, social protection is framed not only as a tool to protect against or prevent negative outcomes but also as a way to promote positive outcomes, such as ‘resilience’, ‘inclusive growth’, ‘social stability’, ‘social cohesion’ and ‘national welfare’ (Dale *et al.*, 2014; Dwyer, 2013; Fiji Government and WFP, 2017; UN ESCAP, 2015; World Bank, 2018).

The actors broadly agree that the main social protection mechanisms are: (1) non-contributory schemes, termed ‘social assistance’ or ‘social safety nets’; and (2) contributory schemes, termed ‘social insurance’. Both social assistance and social insurance operate as transfers, with social assistance including both cash and in-kind transfers. Some actors define social protection as being limited to these transfer-based mechanisms. For example, in the 2015 *Strategy for Australia’s aid investments in social protection*, DFAT provides the following definition of social protection:

‘Social protection refers to programs that address risk, vulnerability, inequality and poverty **through a system of transfers to people in cash or in-kind**. It has three core functions: 1) protection of the poor from the worst impacts of poverty, 2) prevention against income shocks and drops in wellbeing, 3) promotion of opportunities and livelihoods’ (DFAT, 2015:2, emphasis added).

Many authors include a third mechanism in their definition of social protection – labour market programs. Labour market programs can be active or passive. Passive labour market programs provide financial support (income replacement) to individuals during unemployment whereas active labour market programs help people secure productive employment, for example through training or job searches (this includes cash or food for work programs in most of the literature). In this vein, the Asian Development Bank defines social protection as:

... ‘the set of policies and programs designed to reduce poverty and vulnerability **by promoting efficient labour markets**, diminishing people’s exposure to risks, and enhancing their capacity to protect themselves against hazards and interruption/loss of income’ (ADB, 2013: 2, emphasis added).

A further point of variation is whether social protection describes state-based interventions only (AusAID, 2012b) or if it also covers informal or traditional social protection networks and/or non-governmental organisation (NGO) support (Jolly *et al.*, 2015; Oxfam, 2021). Jolly *et al.* (2015) critique what they view as ‘narrow’ definitions of social protection that focus on state-based interventions and are largely confined to the formal sector, citing the following definition and footnote:

‘[Social protection is] all initiatives, both formal and informal, that provide: social assistance to extremely poor individuals and households; social services to groups who need special care or would otherwise be denied access to basic services; social insurance to protect people against the risks and consequences of livelihood shocks; and social equity to protect people against social risks such as discrimination or abuse.’

Footnote: ‘We endorse this definition of social protection as more inclusive than other definitions that are primarily focused on interventions by the state and are too often confined to the formal sector (see, for instance, ADB, 2001: 1–2; ILO, 2001: 38–39; World Bank 2006: 1)’ (Jolly *et al.*, 2015: 2).

Another common difference in definitions is whether other social policies, such as universal health care, are considered as social protection.¹⁰ Actors, including the International Labour Organization (ILO,) discuss such social policies as social protection (for example: Axelson and Leopold, 2021; Mailfert and Plange, 2021; OHCHR and UNFPA, 2023). In a United Nations Entity for Gender Equality and the Empowerment of Women (UN Women) discussion paper, Sen *et al.* (2020:v) identify universal health care as a ‘key element of social protection’. However, in the socialprotection.org classification guidelines (n.d. b:4), health, education and agriculture policies addressed to the whole population are classed as being ‘not strictly social protection’. Furthermore, under the 2015 DFAT definition cited earlier, these policies would not be considered as social protection.

Outside of these clear differences in the definitions, there are subtle variations in how social protection is framed in the literature. Typically, this aligns with the focus of the author or organisation. For example, publications from the ILO largely tend to focus on labour market programs whereas those from UN Women emphasise social protection as a tool to address gender inequality. These differences do not necessarily represent disagreements about how social protection is understood. Rather, they reflect the reality that authors prioritise elements of social protection that are most relevant to their institutional mandates.¹¹

In this report, we present formal social protection as including three mechanisms: social assistance, social insurance and labour market programs. This is consistent with most of the evidence, particularly with publications by prominent multilateral organisations, such as the Asian Development Bank (ADB), the World Bank and various United Nations (UN) agencies. In this classification, ‘social assistance’ is used interchangeably with non-contributory social protection, ‘social insurance’ is used interchangeably with contributory social protection and ‘labour market programs’ refers to active programs. Meanwhile, passive labour market programs are considered as a form of social assistance in this report. We discuss informal and non-government social protection as a separate component of social protection. Other social policies and general subsidies are not discussed in any depth here as they are considered out of the scope of this report.

¹⁰ ‘General subsidies’ (broadly considered a component of social policy) are also sometimes classed as a distinct component of social protection, notably in the World Bank’s ASPIRE classification.

¹¹ These differences in how social protection is defined also influence how information is reported. Depending on what policies are included/excluded as social protection, for example, different organisations are likely to present different figures for total social protection expenditure.

4 Synthesis of evidence

Section 4: Key findings

Formal social protection systems in the Pacific and Timor-Leste are relatively underdeveloped and highly variable across the region although expenditure has been increasing. Although social insurance remains the predominant social protection instrument, spending on social assistance programs is increasing at a faster rate.

Social protection across the Pacific and Timor-Leste has overall low coverage of people outside the formal workforce, largely because social insurance predominates. Social assistance programs generally offer greater coverage of intended beneficiaries than social insurance programs but both forms of social protection are important in the region.

In the wake of the COVID-19 pandemic and increasing climate change impacts, the role of social protection in relation to these risks and shocks is increasingly recognised. It is possible that this is a 'tipping point' for increased social protection in the Pacific and Timor-Leste.

Informal social protection systems continue to be a vital component of support structures across the Pacific and Timor-Leste. Although there is some evidence that these systems are weakening and overburdened, informal social protection continues to contribute to resilience to acute shocks. The need to understand the intersections between formal and informal social protection systems is increasingly being recognised.

Gender equality, disability and social inclusion (GEDSI) considerations are highly relevant to social protection. Gender-responsive social protection is still limited but the gendered components of social protection are being recognised more. Disability and age-inclusive approaches to social protection are more prevalent but coverage still needs to be improved. Evidence is limited on the inclusion of people with diverse **sexual orientation, gender identity, gender expression and sex characteristics** in social protection systems but examples suggest that people in these groups are often excluded from accessing formal social protection.

The evidence on the state of social protection in the Pacific and Timor-Leste is broadly consistent with the global evidence. Similar trends are seen in: the geographic variability of social protection expenditure; the increased focus on social protection following the COVID-19 pandemic; the predominance of social insurance; the need to better understand the intersections between formal and informal social protection systems; and the recognition that GEDSI components need better consideration in social protection.

Perceptions of social protection raised in the global literature are partially covered in the literature from the Pacific and Timor-Leste. While some evidence to refute or support these perceptions exists, it varies between contexts and cannot be considered representative. This is an important area for future research.

In this section, we synthesise the evidence on social protection in the Pacific and Timor-Leste, exploring common themes and characterisations of social protection alongside relevant cross-cutting themes.

4.1 State of social protection

While the evidence shows the presence of social protection in the Pacific and Timor-Leste, formal social protection systems are underdeveloped compared to other regions. Edwards (2020: 2) observes:

‘The Pacific is well behind the rest of the world in supporting its citizens... Globally, over 180 countries have social protection systems in place. Of those that do not, almost all are in the Pacific.’

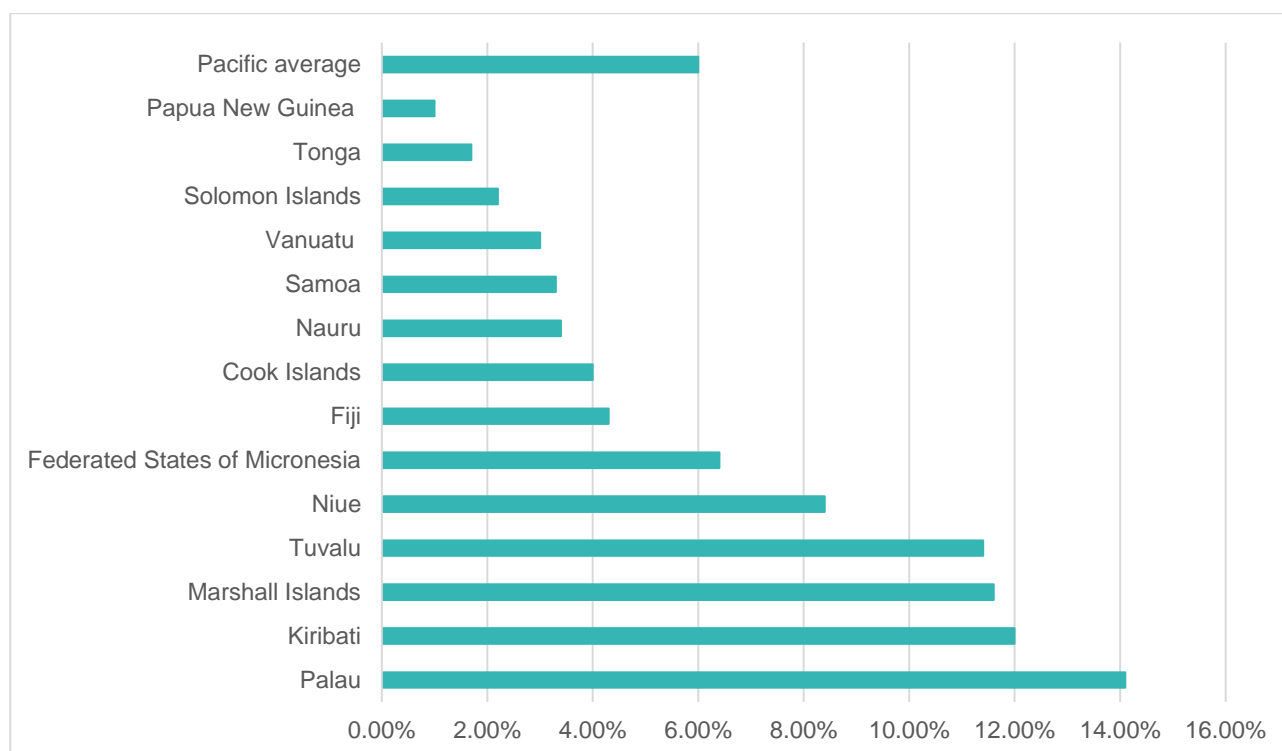
Across a variety of authors using different study methodologies, social protection spending in the Pacific is assessed as relatively low (ADB, 2016a, 2022b; Durán-Valverde *et al.*, 2020; UN ESCAP, 2018b; World Bank, 2018). A recent ILO study reports that total expenditure on social protection as a percentage of gross domestic product (GDP) was lowest in Oceania (1.9 per cent) compared to other regions, including South-Eastern Asia (2 per cent), Sub-Saharan Africa (2.2 per cent) and a ‘global’ figure covering all 134 developing countries (6.6 per cent) (Durán-Valverde *et al.*, 2020).¹²

While expenditure on social protection in the Pacific and Timor-Leste is relatively low when averaged at the regional level, this masks significant variations within the region. Social protection expenditure is relatively high in some Pacific countries and exceeds that of other low and middle income countries in Asia and the Pacific as a percentage of gross national income (GNI) (Knox-Vydmanov & Satriana, 2022). Furthermore, social protection spending in Timor-Leste is among the highest in the developing world and was at about 7 per cent of non-oil gross domestic product (GDP) in 2019 (World Bank, 2022). However, most of Timor-Leste’s social protection budget is allocated to a veterans’ pension, leading to concerns around fiscal sustainability, limited impact on poverty relative to the level of expenditure and fairness (Pruce *et al.*, 2023; P4SP, 2022; World Bank, 2022; Umpathi *et al.*, 2013).

Using data from an ADB (2022b) report, Figure 2 highlights the variations in social protection expenditure in the Pacific. The report details expenditure on social protection in 2018 as a portion of GDP per capita across 14 Pacific Island countries. Overall expenditure on social protection across these countries averaged 6 per cent of per capita GDP, ranging from 14.1 per cent in Palau to just 1.0 per cent in Papua New Guinea (ADB, 2022b). Of this group, smaller Pacific Island countries, such as Kiribati, Tuvalu, the Marshall Islands and Palau, had the highest social protection spending relative to GDP per capita (ADB, 2022b).

¹² Oceania consists of American Samoa, Australia, Cook Islands, Fiji, French Polynesia, Guam, Kiribati, Marshall Islands, Federated States of Micronesia, Nauru, New Caledonia, New Zealand, Niue, Norfolk Island, Northern Mariana Islands, Palau Islands, Papua New Guinea, Samoa, Solomon Islands, Tokelau, Tonga, Tuvalu, Vanuatu, Wallis and Futuna Islands.

Figure 2: Expenditure on social protection as a proportion of gross domestic product per capita in 2018



Source: Data from ADB (2022b). Note that this data is from before the COVID-19 pandemic.

As a point of comparison within the Asia-Pacific region, Japan had the highest social protection spending as a percentage of GDP at 11.7 per cent – similar to Kiribati’s social protection spending at 12 per cent of GDP (ADB, 2016a, 2022b). However, the per capita GDP in Japan that year was over USD46,500 compared to Kiribati’s USD1,760 so absolute expenditure per beneficiary is much lower in Kiribati (ADB, 2016a, 2022b). While social protection spending is proportional to available government resources, countries with lower GDP per capita are also likely to have a higher proportion of vulnerable citizens in need of social protection. In the Pacific, therefore, social protection expenditure generally constitutes a small proportion of a small per capita GDP figure.

4.2 Increasing focus on social protection

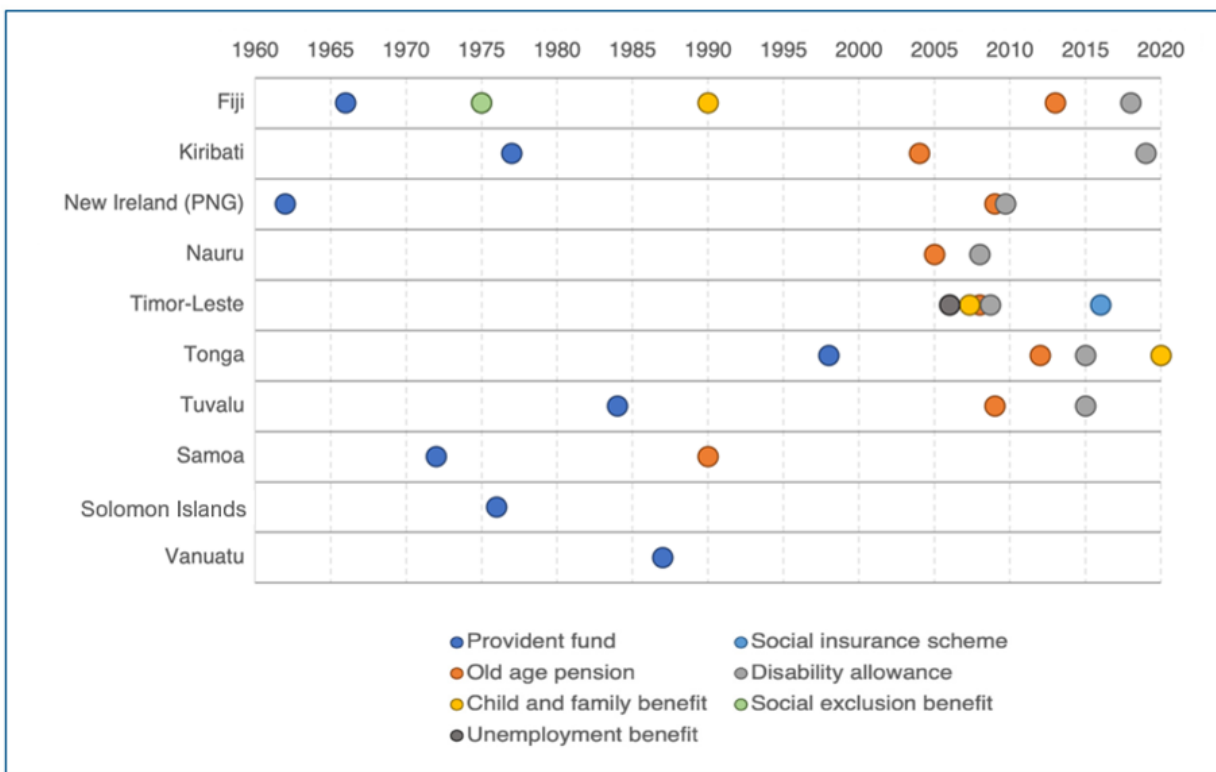
Social protection spending across the Pacific and Timor-Leste is showing consistent – albeit modest – increases. ADB (2022b) reports a steady increase in social protection spending (as a percentage of GDP per capita) across eight Pacific countries between 2009 and 2018, with the steepest increase in the latter part of that period.¹³ Although social insurance remains the predominant instrument, the expenditure mix is slowly shifting. In the same analysis ADB (2022b) found that social insurance spending increased from 2.4 per cent of per capita GDP in 2009 to 3.4 per cent in 2018, while social assistance spending rose from 0.6 per cent of GDP per capita to 1.2

¹³ Countries included in this analysis are Fiji, the Marshall Islands, Nauru, Palau, Papua New Guinea, Samoa, Solomon Islands and Vanuatu.

per cent (ADB, 2022b). Labour market programs remain limited, with spending increasing from just 0.1 per cent of per capita GDP in 2009 to 0.2 per cent of per capita GDP by 2018 (ADB, 2022b). Over this period, the proportion of total social protection expenditure dedicated to social insurance fell from over 75 per cent in 2009 to just over 70 per cent in 2018 (ADB, 2022b). This shift indicates that while social protection expenditure is increasing, the predominance of social insurance is gradually declining as social assistance (and labour market programs to a lesser extent) gain more attention.

The growth of social protection in the Pacific and Timor-Leste, as well as the increasing focus on social assistance, is also documented by Knox-Vydmanov *et al.* (2023) in a P4SP-commissioned study. The authors trace the historical development of social protection schemes in nine Pacific countries and Timor-Leste and find that while most countries introduced social insurance schemes shortly before or after independence, the advent of social assistance schemes is more recent, occurring only in the last 15 to 20 years, as seen in Figure 3 (Knox-Vydmanov *et al.*, 2023).¹⁴ A notable exception is Fiji that introduced the Family Assistance Programme (social assistance) in 1975.

Figure 3: Timeline of introduction of main social protection schemes in 10 countries



Source: Reproduced from Knox-Vydmanov *et al.* (2023)

Following the broad introduction of social assistance programs across the Pacific and Timor-Leste, social assistance expenditure has increased over time although trends vary between countries. For example, Timor-Leste increased spending rapidly by implementing the old age and disability pension and the *Bolsa da Mãe* program (to support poor and vulnerable households with children)

¹⁴ Countries included in this analysis are Fiji, Kiribati, Nauru, Papua New Guinea, Timor-Leste, Tonga, Tuvalu, Samoa, Solomon Islands and Vanuatu.

in 2008. This rapid rollout of social protection was an exceptional response to a period of civil unrest and political instability. Fiji illustrates the more common scenario of steady increases. Nevertheless, social protection expenditure tripled for Fiji between 2013 and 2022, despite relatively modest yearly increases, typically no more than 0.1 per cent of GDP (Knox-Vydmanov *et al.*, 2023). Similarly, in Kiribati, social protection expenditure doubled as a proportion of GDP from 2008 to 2019 because of the gradual expansion of the Senior Citizens' Grant (Knox-Vydmanov *et al.*, 2023).

Returning to the wider Pacific context, the increasing share of social assistance within the social protection expenditure mix reflects both increases in the number and coverage of social assistance programs, as well as increases in transfer values within programs.

4.3 Shock-responsive and climate-resilient social protection

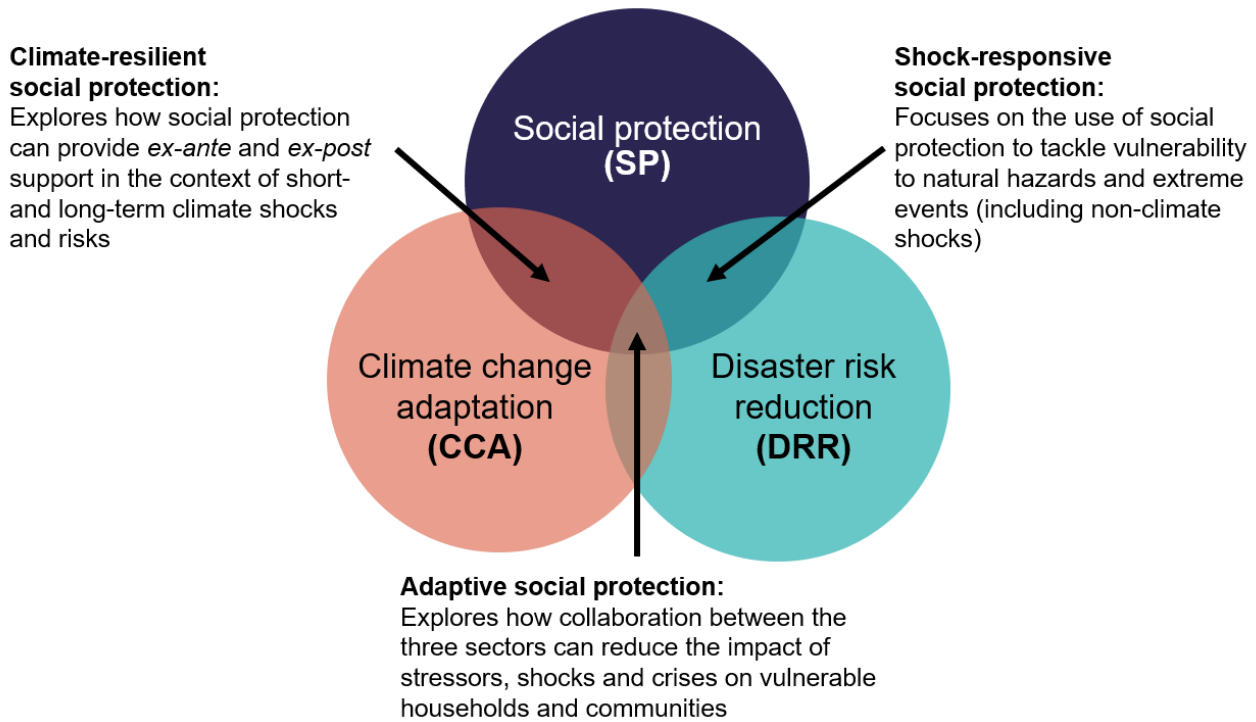
Pacific countries and Timor-Leste are highly vulnerable to the impacts of climate change and other shocks and the lack of appropriate formal social protection contributes to this vulnerability (Costella and Ivaschenko, 2015; Handino, 2018; Le De and Backson-Becerra, 2021). The role of social protection in responding to these impacts is increasingly recognised in the literature. Social protection has been used as a tool in recovering from cyclones (see for example, Doyle, 2018; Mansur *et al.*, 2017). The evidence suggests that countries that have social protection systems are better equipped to respond rapidly and effectively to acute shocks (Beazley *et al.*, 2021; Costella and Ivaschenko, 2015; Stein and Parsons, 2023).

The literature discusses in some depth the need for social protection that manages and responds to the impacts of not only acute but also slow-onset and medium or long term climate change (see for example, Burton *et al.*, 2015; Costella and Ivaschenko, 2015; Rafisura *et al.*, 2020). Social protection can fulfil a wide array of functions in relation to climate change and Costella and McCord (2023: 2) outline the following five:

1. Reducing underlying vulnerability to climate change;
2. Responding to climate shocks and disasters;
3. Offsetting the negative welfare impacts of climate transition policies;
4. Facilitating climate change adaptation options;
5. Contributing to reduced greenhouse gas emissions and carbon sequestration.

Concepts such as adaptive, shock-responsive and climate-resilient social protection all fall within these functions (see Figure 4), as do some social protection programs that do not focus on climate (Costella and McCord, 2023).

Figure 4: Intersections between adaptive, climate-resilient and shock-responsive social protection¹⁵



Source: Adapted from Cornelius (2018); Costella and McCord (2023)

Formal social protection systems use cash transfers to respond to acute events (Ivaschenko *et al.*, 2020). Cash transfers mean households can be flexible in how they allocate benefits and the transfers also inject money into local economies which can be vital in helping markets recover from shocks (Ivaschenko *et al.*, 2020; Pacific Regional Cash Working Group, 2022b). Insurance coverage for climate and disaster shocks is also becoming more prominent, for example through the Pacific Catastrophe Risk Assessment and Financing Initiative (Mahul *et al.*, 2016). Evidence of the role of social protection in relation to medium-term and long-term climate change impacts and risks has less coverage in the literature. Costella and McCord (2023) argue that this is the key gap to address:

‘The current conceptualisation of social protection – globally and in the [Asia-Pacific] region – needs to be reconsidered in response to the vast economic and social transformations that climate change will bring about in the coming decades’ (Costella & McCord, 2023: 3).

The role of social protection in relation to climate change is an emerging area in the evidence and an important area for ongoing research.

The COVID-19 pandemic also drew attention to social protection as an important shock response mechanism while exposing gaps in existing social protection systems (Plange, 2021; UN ESCAP, 2021b; UN ESCAP *et al.*, 2022; Van der Auwera *et al.*, 2021). An unprecedented number of social protection responses were rolled out both globally and in the Pacific region, with more than 83

¹⁵ There are some variations in how these terms are defined and applied within the literature (see for example Van der Auwera *et al.*, 2021).

social protection measures implemented across 13 Pacific countries (Beazley *et al.*, 2021). Most of these programs were based on social assistance (55 per cent), rather than social insurance or labour market programs and many were built on existing cash transfer mechanisms (Beazley *et al.*, 2021). Although these responses were typically short-term, Beazley *et al.* (2021) argue that the COVID-19 pandemic highlighted the importance of social protection in shock response and exposed current weaknesses in the systems. They suggest that the lessons learned may create a ‘tipping point’ for increased and more effective social protection in the Pacific and Timor-Leste (Beazley *et al.* 2021: 23).

Informal social protection plays a key role in insulating people from acute shocks. This was demonstrated in the wake of tsunami and flash flooding events in the Solomon Islands where support from these informal social support systems (known also as *wantok*) was key to recovery (Ha’apio, 2019). Formal social protection can complement this informal support, as happened in Vanuatu following tropical cyclone Harold and the COVID-19 pandemic (Stein *et al.*, 2022). However, in the case of covariate shocks (where communities or societies are impacted as a whole), the resources available for informal social protection may be compromised (Costella & McCord, 2023). This is a particular concern in relation to climate change. The role of informal social protection in responding to shocks is further discussed in section 4.5.

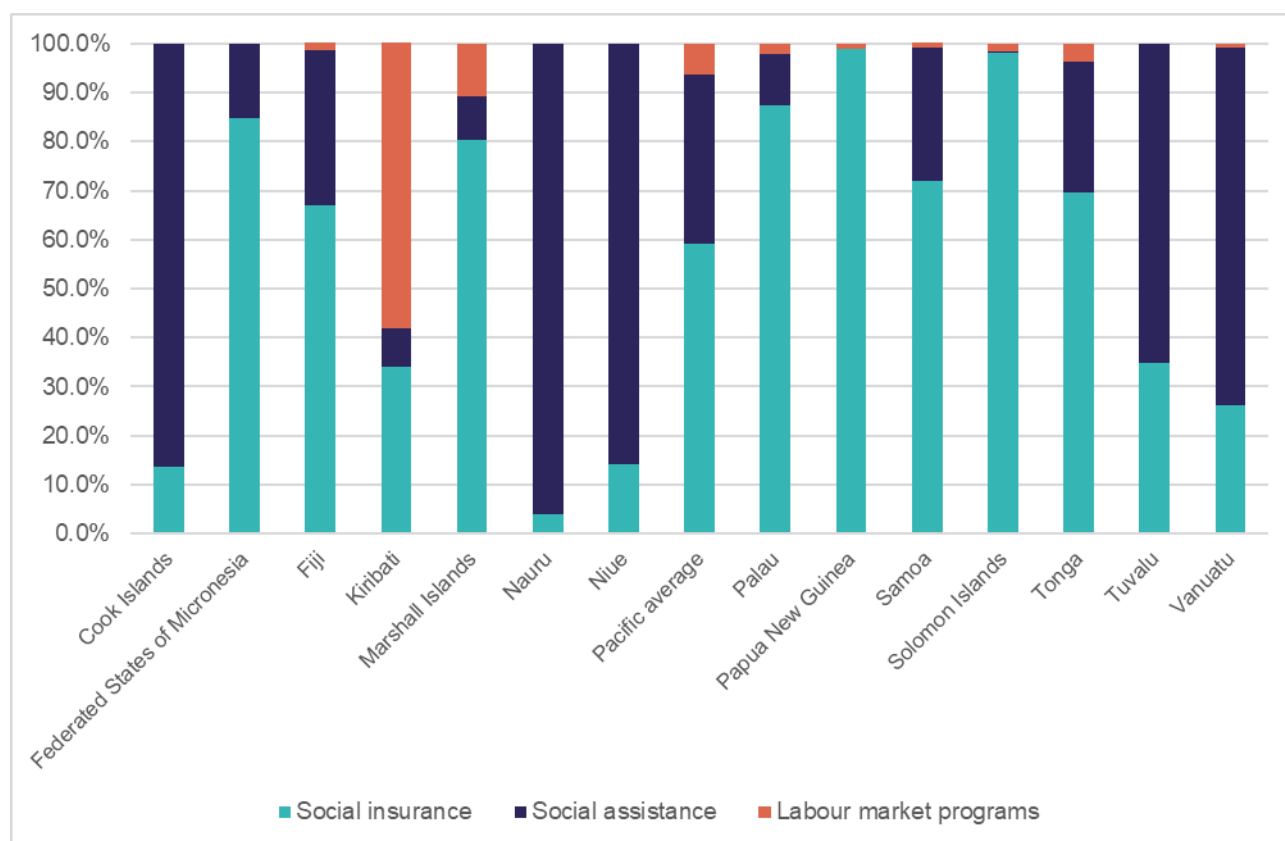
4.4 Protecting people outside the formal workforce

The effectiveness of social protection is influenced by many factors aside from total spending. The research shows that social protection system coverage is often limited for people outside the formal workforce in the Pacific and Timor-Leste, resulting in many vulnerable people being excluded (ADB, 2022b; Barca *et al.*, 2021; Campbell, 2020). This is largely due to social protection schemes, especially social insurance programs, focusing on public servants and formal sector workers. As discussed in section 4.2, social insurance has long been the predominant social protection instrument in the Pacific (ADB, 2016b, 2022b; Knox-Vydmanov *et al.*, 2023) (see Figure 5).

Contributory old-age or retirement pensions, commonly facilitated through national provident funds in the Pacific, are widespread forms of social insurance in the Pacific and Timor-Leste (ADB, 2022b). These contributory schemes typically cover people in formal employment and, in some cases, only public sector workers (ADB, 2022b). While they provide essential protection for formal workers, they generally do not reach those outside formal employment who may constitute a significant (and vulnerable) proportion of the population. For example, in Vanuatu, about 75 per cent of the labour force is not engaged in formal employment (Satriana *et al.*, 2014). This focus on the formal workforce contributes to the low social insurance coverage in the Pacific which on average provides benefits to only 9.9 per cent of intended beneficiaries or just 2.6 per cent when Palau’s high figure is removed (ADB, 2022b).¹⁶ For those who are not employed in the formal sector, any social protection benefits received are likely to be through social assistance programs or via informal social protection networks.

¹⁶ Palau has a social insurance coverage rate of 94.3 per cent of intended beneficiaries, as their superannuation scheme is supplemented by two health insurance schemes that benefit almost the entire population and many people receive benefits from multiple schemes (ADB, 2022b).

Figure 5: Expenditure for each type of social protection as a proportion of total social protection expenditure



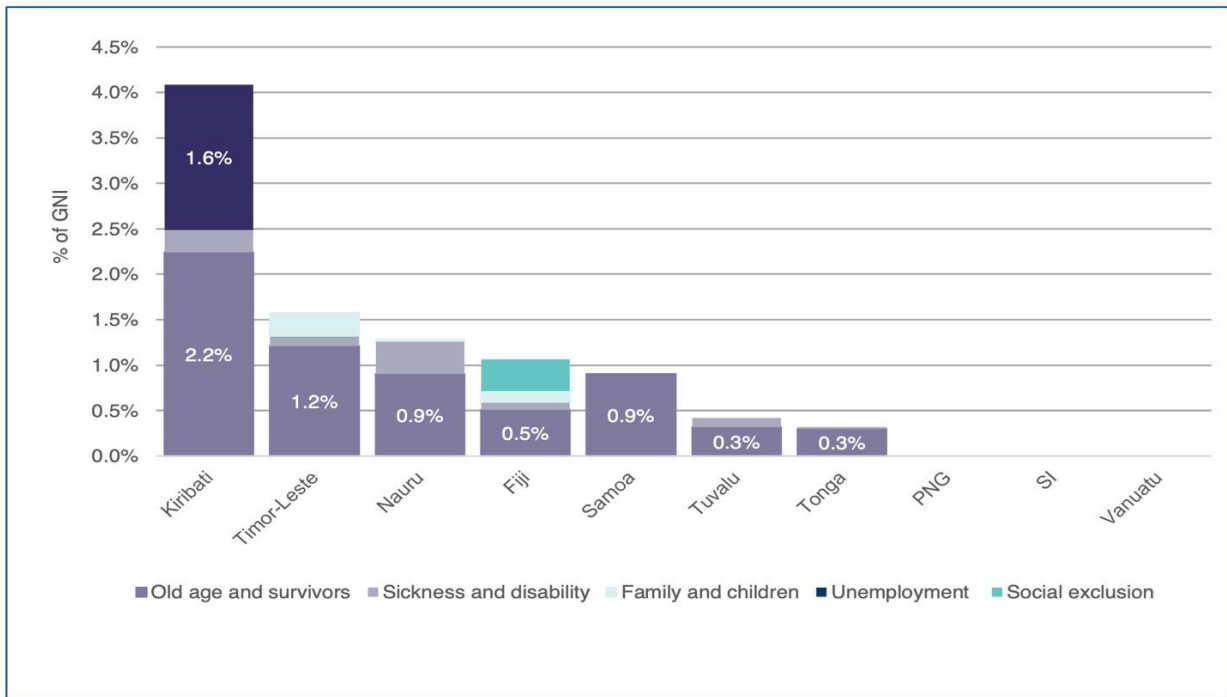
Note: Kiribati’s high proportion of expenditure on labour market programs may reflect that passive labour market programs were included in the social protection index.

Source: Data from ADB (2022b)

Social assistance programs receive less funding than social insurance across the Pacific and Timor-Leste but tend to achieve higher coverage of intended beneficiaries.¹⁷ ADB (2022b) reports that social assistance in the Pacific covers about 20 per cent of intended beneficiaries, exceeding social insurance or labour market program coverage. Social assistance is seen as a key mechanism to respond to shocks and support vulnerable groups across a variety of contexts (Kidd, 2012). As discussed in section 4.2, social assistance spending is on the rise compared to other kinds of social protection. The most common kinds of social assistance in the Pacific and Timor-Leste are universal (non-contributory) old age pensions and disability benefits, as shown in Figure 6 (Knox-Vydmanov *et al.*, 2023).

¹⁷ Comparisons of social assistance and social insurance expenditure are not like-for-like, noting that social assistance programs are typically tax-financed whereas many social insurance programs require employee and employer contributions (through private sector and/or government funding).

Figure 6: Social assistance benefits by function, as a percentage of gross national income across 10 Pacific countries



Source: Reproduced from Knox-Vydmanov *et al.* (2023)

A report by the United Nations Economic and Social Commission for Asia and the Pacific explores how countries achieve effective coverage of vulnerable populations (UN ESCAP, 2018b). They found that universal social assistance programs where benefits are extended to particular population groups (for example, all those over the age of 60) tend to be more effective in tackling poverty and inequality than poverty-targeted and conditional social assistance. Targeting the poor in social assistance programs results in high exclusion errors due to the processes used to identify the poor and the conditions applied (for example, children’s school attendance) tend to exclude those who most need the benefits (UN ESCAP, 2018b).

Costella and McCord (2023:68) also highlight that in the context of climate change, the scale of the social protection needed has expanded and requires a ‘rethink’ of poverty targeting and universalism in social protection. They argue that broader social protection coverage that includes those not traditionally targeted will be needed in the context of large covariate shocks brought about by climate change:

‘Moving away from current targeting practices based on poverty and individual characteristics towards geographical and universal approaches to efficient and needs-based provision may be appropriate’ (Costella & McCord, 2023: 63).

However, other authors recommend better targeting of the poor as a priority for improving the outcomes of social assistance programs (see for example, David *et al.*, 2011; Global Development Network, 2014).

In the Pacific and Timor-Leste, most social assistance programs are universal. However, ongoing research is needed on how best to design and implement social protection programs in the region (including both social assistance and social insurance) to maximise their positive outcomes, particularly in providing support for those outside the formal workforce.

4.5 The role of informal social protection

The evidence also discusses the significance of ‘informal’ or ‘traditional’ social protection networks and both these terms can be problematic. These networks are often highly structured and culturally institutionalised, making ‘informal’ a false description (Ratuva, 2010). Meanwhile, the term ‘traditional’ implies something from the past – outdated or no longer in use – which is also false. We use the term ‘informal social protection’ in this report, reflecting that these systems function outside formal market interactions. These extended kinship and clan-based networks (known by various names in different locations, including *wantok*, *kastom*, *kerekere* and *aiga potopoto*) as well as church-based networks can protect vulnerable people and insulate them against shocks (AusAID, 2012a). The literature does not present a consistent view of informal social protection since some authors focus on weaknesses while others point to strengths.

The literature widely argues that informal social protection systems are weakening because of interactions between complex factors, such as: modernisation; increased reliance on formal markets; the rise of overall poverty; commodification of land; and traditional social ties being loosened (see for example, Anderson *et al.*, 2017; Dwyer, 2013; Mohanty, 2011; Rooney, 2017). Some authors warn that informal systems are not sufficient to prevent poverty in the Pacific and caution against ‘over-dependence’ on these informal networks (Mohanty, 2011: 28; see also AusAID, 2012a; Kidd, 2012). These arguments are often used as evidence for the need to expand the formal social protection system.

This view is not universal. Ratuva (2014) criticises the tendency of many actors in the social protection sphere to focus almost exclusively on formal social protection. He argues that metrics, such as the Asian Development Bank’s Social Protection Indicator (SPI)¹⁸ (which only accounts for formal social protection), assume ‘the paramountcy of formal western governance and development systems and the subordinate status of informal, subsistence and non-capitalist norms and institutions’ and fail to recognise that:

‘...Pacific communities have over the years developed culture-based mechanisms, not captured in Western-based classificatory schemas, which provide them with resilience and adaptability in the face of neoliberalism and globalisation’ (Ratuva, 2014: 41).

A prominent way of achieving the resilience and adaptability Ratuva (2014) mentions is through migration and subsequent remittances. Based on their study in Fiji and Tonga, Brown *et al.* (2013) found that these remittances can perform a similar function to formal social protection systems, contributing to development objectives, poverty alleviation and wealth creation. The remittances provided appear to be broadly countercyclical and payments often increase when the migrants’ dependents in their home countries face income shocks or financial hardships (Brown *et al.*, 2013). In the context of the COVID-19 pandemic, nearly 70 per cent of Pacific seasonal workers in New Zealand reported decreased earnings due to reduced working hours but 40 per cent of these workers either maintained or increased their remittances (CROP, 2021). Other forms of informal social protection are also important, including barter systems (Finau & Kant, 2021). Furthermore, these informal types of social protection can sometimes function in a crisis when formal markets

¹⁸ Formerly called the Social Protection Index

are interrupted or not well-established. They can also capture people who are not engaged in formal employment, filling a key gap already identified in social insurance programs.

Some authors that view informal social protection positively are also wary of increasing formal social protection systems in the Pacific and Timor-Leste, fearing this will undermine or degrade the existing informal networks (Anderson *et al.*, 2017; Barca *et al.*, 2021; Dwyer, 2013; Leweniqila, 2010; Mohanty, 2011). This is associated with an issue described in ADB (2010:6):

'In the Pacific region, one of the difficulties of including vulnerability or poverty issues in national policies has been the prevalent view that vulnerability somehow represents a failure of local cultures and their traditions of family support.'

However, evidence is lacking to either support or refute the idea that formal social protection systems undermine informal ones, even in the global literature (Barca *et al.*, 2021).

Some evidence suggests that informal and formal systems do not operate as a 'zero-sum game' (where one system's gain means the other system's loss). Calder and Tanhchareun (2014: 5) argue that informal and formal social protection exist together as both 'competing and reinforcing systems'. One situation where formal and informal systems were complementary was during the COVID-19 pandemic in Timor-Leste. An evaluation of the emergency COVID-19 cash transfer in Timor-Leste found that households with stronger informal social protection networks benefitted more from the payment (Barca *et al.*, 2021). This was because they could meet basic needs, such as food, through informal networks and were therefore able to spend the government payment on other expenses, such as education (Barca *et al.*, 2021).

Ratuva (2014) argues that informal social protection systems in the Pacific have proved they can adapt and are resilient in the face of emerging challenges. In cases of shocks and crises, informal social protection networks can also provide non-tangible benefits by uniting communities and maintaining overall wellbeing (Meo-Sewabu, 2021). However, increasing covariate shocks, including as a result of climate change, may deplete the resources available and reduce the capacity for informal social protection in these situations (Costella & McCord, 2023).

Where informal social protection systems may reinforce hierarchical social structures and leave some vulnerable people and families out, formal social protection may fill these gaps (Calder & Tanhchareun, 2014). Many authors therefore highlight the need to better understand the intersections between formal and informal social protection systems to achieve optimum complementarity (ADB, 2020; Calder & Tanhchareun, 2014; Feeney & McDonald, 2016; Ratuva, 2010).

4.6 Social protection and gender equality, disability and social inclusion

Social protection aims to benefit those who are vulnerable, marginalised or in positions of disadvantage within society so how it intersects with gender equality, disability and social inclusion (GEDSI) is highly relevant.

Gender and social protection

Women across the Pacific and Timor-Leste face considerable hardship, including high rates of gender-based violence. They are disproportionately impacted by crises such as the COVID-19 pandemic that resulted in higher rates of violence, more unpaid domestic work, reduced access to health services and economic hardships (Pacific Women Lead, 2021). In formal social protection systems in the Pacific and Timor-Leste, women consistently receive fewer benefits and less coverage (Handayani, 2014). This is exacerbated by women being less likely than men to have formal employment, making them ineligible for many social insurance schemes. The increasing numbers of Pacific women engaged in paid work are concentrated in lower-paid jobs with vulnerable work conditions and their domestic caring responsibilities continue to impact on their time and productivity (PSDI, 2022). Even within informal social protection systems, women may be disadvantaged. For example, women in Papua New Guinea reported that they are under pressure to share their financial resources, facing threats and violence from those who feel they are entitled to these resources (Parker *et al.*, 2017). Women from Solomon Islands expressed similar sentiments (Eves, 2017). Social protection programs could have an influence on gender-based violence but evidence is lacking on this issue.

Few social protection programs are designed to directly address gender inequality but some common social protection mechanisms can empower women, even if that was not their declared goal (Holmes & Slater, 2012). Common social protection mechanisms, such as maternity, paternity or parental leave and childcare support, can reduce the care burden for women. However, paid maternity health coverage is limited in the Pacific and only available to workers in the formal sector (except for Cook Islands) (Pacific Women Lead, 2017). Save the Children (2023) found that, overall, cash transfers improve gender relations in Solomon Islands and Vanuatu but stress that cash alone cannot address non-economic drivers of marginalisation; we need context-specific approaches to avoid negative outcomes. Furthermore, a review of cash transfer programs in Solomon Islands found that the husbands often receive and control the transfers, even when women are targeted as the primary recipients (Delforce & Woyengu, 2023a).

In a UN Women discussion paper about gender and social protection in the Pacific, Jolly *et al.* (2015:i) highlight the risk of women ‘falling through the net’ of social protection if systems are not designed in gender-responsive ways. While the concept of gender-responsive social protection is still emergent in the literature in the Pacific and Timor-Leste, the gendered impacts of programs are increasingly being considered. The gendered impacts of social protection, including its potential effect on gender-based violence in some contexts, are areas for future research.

Disability and social protection

Social protection for persons with disabilities has become more common in the Pacific and Timor-Leste over the past decade although countries are at different stages of implementing it (Sammon *et al.*, 2021). Both Nauru and Timor-Leste introduced tax-funded disability benefit schemes before 2010, with Tonga and Tuvalu following suit in 2015, and Fiji, Kiribati and Samoa’s tax-funded disability benefits coming later (Knox-Vydmann & Cote, 2023). Across the Pacific, many disability benefits are universal and sometimes included in the same program as old-age benefits. This is the case for Timor-Leste’s Pension for Older Persons and People with Disabilities (*Subsídio de Apoio a Idosos e Inválidos*) which was implemented in 2008 (for more information, see ILO, 2016). Cash transfers from such schemes are important in providing people with disabilities and their

families access to healthcare and education, as well as helping them recover from shocks (Sammon *et al.*, 2021).

However, the evidence shows that disability benefit coverage remains low relative to the total number of people with disabilities. In Nauru, for example, 33.5 per cent of people with disabilities were receiving government-funded disability benefits in 2018 (UN ESCAP, 2018a). A key barrier to expanding coverage of disability-inclusive social protection in the Pacific is the medically-driven model of disability assessment. Staff or skills shortages, geographic isolation and high costs make it difficult for many people to access medical personnel (Knox-Vydmanov & Cote, 2023). Fiji has shifted towards more accessible mechanisms that not only assess impairment but also the support that a person requires, usually without the need for a medical assessment (Knox-Vydmanov & Cote, 2023). This has resulted in a rapid expansion of coverage in Fiji's disability benefit programs, with the number of people registered for disability-targeted social protection programs increasing more than fourfold from 26,070 people in 2015 to 113,595 people in 2018 (ADB, 2022b).

A further issue in disability-inclusive social protection is that, in some cases, disability payments are incompatible with work, including in Timor-Leste, Cook Islands, Palau and Niue (ADB, 2022b; Knox-Vydmanov & Cote, 2023). This reflects the perception that disability benefits are simply to compensate for an assumed reduced or absent capacity for work. Knox-Vydmanov and Cote (2023) argue that with the right support and environment, most people with disabilities can engage in the labour market and so disability benefits should rather account for the significant extra costs people with disabilities face.

Social inclusion and social protection

Social inclusion and social protection overlap in many ways. Social protection aims to protect the most vulnerable members of society and should, in theory, promote social inclusion of those who are disadvantaged on the basis of their identity. Including women and people with a disability are core components of social inclusion, as discussed in the previous two sections.

The next issue most frequently discussed in the literature on social inclusion relates to older people. Many populations in the Pacific and Timor-Leste are ageing which can lead to greater economic inequality and poverty for older people, as well as concerns about providing suitable long-term care (ADB, 2022a; O'Keefe *et al.*, 2015; UN ESCAP, 2017). While old age benefits are common, their coverage and benefit levels remain low and many older people continue to work into their later years to earn necessary income (UN ESCAP, 2017). Old age benefits are often shared – in Samoa, Taua'a (2011) found that payments under the non-contributory old age pension were typically shared with the entire household (with grandparents, parents and children living together) rather than spent by the individual recipient. As rapid population ageing continues, social protection for older people needs to cover more people and ideally provide higher transfer sums. Increasing transfer values could reduce the number of older people who continue working and also ensure that benefits retain their real value in the context of inflation. This poses a key fiscal challenge to governments across the Pacific and Timor-Leste.

Another group that is marginalised in social protection systems is people with diverse sexual orientation, gender identity, gender expression and sex characteristics (sometimes referred to by the acronym SOGIESC). They face a variety of challenges that often result in barriers to formal employment and higher risks of poverty. This issue is not prominent in the literature but a report by Edge Effect (2021:9) that draws on case studies that include Fiji notes that 'we don't do a lot for

them specifically'. A study of the COVID-19 pandemic household cash transfer program in Timor-Leste found that people in this group commonly reported they relied on support from advocacy organisations or friends (informal systems) rather than on government payments (The Asia Foundation, 2020). In times of shocks and crises, people in this group can be excluded from both informal and formal social protection systems due to discrimination (Edge Effect, 2021).

The limited evidence on how children and young people are included in social protection has a narrow geographic focus and largely comes from one organisation. Save the Children's series of reports on social inclusion relate to their cash transfer programming in the Solomon Islands and Vanuatu (Delforce & Woyengu, 2023a; 2023b; Save the Children, 2023) but they focus on the gendered components of social inclusion, rather than on age groups. Save the Children's global review of evidence on social protection and childhood development outcomes draws mostly on evidence from Latin America and cautions against generalising the results to Pacific Island countries (Barrett *et al.*, 2023). Including young people in social protection is therefore an area for future research.

Social inclusion of other disadvantaged groups in social protection policies, such as people from diverse ethnic groups, remains an under-researched area that would benefit from future research.

4.7 Comparison with global evidence

The key findings from the Pacific and Timor-Leste do not differ significantly from wider global trends. Social protection approaches and coverage are highly variable within the region and across the world. While the COVID-19 pandemic saw a global increase in social protection investment, whether countries will sustain these levels of investment once they have recovered from the impacts of the pandemic is not clear. The COVID-19 crisis highlighted the uneven access to social protection, with a high proportion of women and informal workers missing out on support as they are not part of formal social security schemes. This led to advocacy for gender-responsive social protection as well as more investment in social assistance for people outside the formal sector.

The need for more evidence and research on the intersections between formal and informal social protection systems is globally recognised. The Pacific is adopting and steadily increasing universal elderly and disability benefit schemes and this positive action is the foundation for comprehensive social protection systems. However, research is needed on achieving complementarities between an expanded social protection system and existing informal structures.

Table 1 sets out the *Evidence Review's* key findings on the state of social protection in the Pacific and Timor-Leste compared to the global evidence base.

Table 1: Comparison of global evidence and evidence from the Pacific and Timor-Leste

Key findings for the Pacific and Timor-Leste	Comparison with the global evidence
<p>Formal social protection systems in the Pacific and Timor-Leste are highly variable and largely underdeveloped but improving. Although social insurance remains the predominant social protection instrument, spending on social assistance programs is increasing at a faster rate.</p>	<p>Expenditure on social protection in Oceania as a proportion of gross domestic product (GDP) is slightly below comparable developing-country regions but similar in per capita terms to low and middle income countries in the Asia-Pacific region (Durán-Valverde <i>et al.</i>, 2020; Knox-Vydmanov & Satriana, 2022).</p> <p>Global social protection coverage is highly variable with significant gaps. Many countries have made significant progress towards universal old-age pension coverage. While some countries have established universal non-contributory, tax-financed schemes, other countries are close to achieving universality through a combination of contributory and non-contributory schemes (ILO, 2021b).</p>
<p>In the wake of the COVID-19 pandemic and increasing climate change impacts, the importance of social protection as a shock response mechanism is increasingly recognised. This is a possible ‘tipping point’ for increased and improved social protection in the Pacific and Timor-Leste.</p>	<p>The COVID-19 pandemic exposed deep-seated inequalities and gaps in social protection coverage across all countries and saw an unprecedented social protection policy response (ILO, 2021b).</p> <p>In the wake of the pandemic, countries are at a ‘crossroads with regard to the trajectory of their social protection systems’, with many developing countries also facing significant fiscal constraints (ILO, 2021b: 18).</p> <p>It remains to be seen whether countries will leverage the ‘policy window’ opened by the pandemic to strengthen their social protection systems in the context of both shocks and life cycle risks (ILO, 2021b: 18).</p>

Key findings for the Pacific and Timor-Leste	Comparison with the global evidence
<p>Social protection across the Pacific and Timor-Leste has low coverage for people not formally employed, largely due to the predominance of social insurance (particularly contributory old-age pensions) which typically excludes those outside the formal labour market.</p>	<p>This trend is not dissimilar to other developing countries, where benefits from contributory schemes are greater than from non-contributory schemes (ADB, 2022b). Efforts to provide support for workers outside the formal workforce are being discussed in the global literature although evidence is varied and complex (see Guven <i>et al.</i>, 2022; UN ESCAP, 2022).</p>
<p>Informal social protection systems continue to be a vital component of support structures across the Pacific and Timor-Leste. While some evidence suggests these systems are weakening and overburdened, informal social protection continues to contribute to resilience to shocks. The need to understand intersections between formal and informal systems is increasingly recognised.</p>	<p>Global evidence on the interactions between formal and informal social protection is limited. One study suggests that although informal social protection measures provide resilience to shocks, their usefulness at the household level remains an under-researched area (Mumtaz & Whiteford, 2021).</p> <p>Even when informal social protection exists, it does not necessarily provide the level of coverage that households need. This suggests that formal social protection is still likely to be useful where informal social protection mechanisms are present and working (J-PAL-EPoD, 2023).</p> <p>The need for more evidence and research on the interactions between formal and informal social protection systems is globally recognised. This includes research on the risks of formal social protection crowding out informal social protection where the existing research findings are mixed (J-PAL-EpoD, 2023).</p>

Key findings for the Pacific and Timor-Leste	Comparison with the global evidence
<p>Considering GEDSI issues is highly relevant in social protection. Gender-responsive social protection is still limited but stakeholders are more aware of the gendered components of social protection. Social protection systems for elderly people and those with disabilities are more common but coverage needs to be improved. Limited evidence is available on social inclusion of people with diverse sexual orientation, gender identity, gender expression and sex characteristics but examples show that people in this group are often excluded from accessing formal social protection.</p>	<p>The COVID-19 crisis highlighted that global access to social protection is uneven, with a higher proportion of women and informal workers missing out on support, as they are not part of a formal social security scheme (ILO, 2021b).</p> <p>Despite this elevated advocacy for gender-responsive social protection and increased investment in social assistance that covers people outside the formal sector, more research is needed to understand what a gender-responsive social protection system would need to entail in practice (Cookson <i>et al.</i>, 2023).</p> <p>Global trends indicate a shift from deliberately integrating gender in social protection towards taking a human rights-based approach that includes people with diverse sexual orientation, gender identity, gender expression and sex characteristics (Social Protection and Human Rights, 2015).</p>

Perceptions of social protection

The global evidence acknowledges the range of perceptions that exist about social protection. Influential work by Handa *et al.* (2018) identified the following six perceptions relating to unconditional cash transfers:

1. They induce higher spending on ‘temptation goods’, such as alcohol and tobacco;
2. The transfers are fully consumed (rather than invested);
3. They create dependency (reduce participation in productive activities);
4. They increase fertility;
5. They lead to negative community-level economic impacts (including price distortion and inflation);
6. They are fiscally unsustainable.

Handa *et al.* (2018) assessed these perceptions in relation to a set of large-scale, government unconditional cash transfers in Sub-Saharan Africa. Based on this evidence, the authors conclude that these perceptions are ‘myths’ and they ‘present a distorted picture of the potential benefits of these programs’ (Handa *et al.*, 2018: 260). Some of these perceptions emerged in the context of the Pacific and Timor-Leste but evidence to support or refute them is limited.

Use of transfers

The first two perceptions relate to how transfers are used and the most commonly raised in the literature on the Pacific and Timor-Leste is the first perception that transfers lead to higher spending on 'temptation goods' (see for example, PRCWG, 2022a, 2022b). Authors respond by pointing to global evidence that cash transfers do not lead to increased spending on temptation goods and, in some cases, even lead to less spending on these items (see Ivaschenko *et al.*, 2020 which cites Harvey, 2007 and Evans & Popova, 2017). Evidence from the Pacific and Timor-Leste is limited and mostly restricted to transfers made in response to shocks.

Studies on the use of emergency cash transfers in Fiji in response to the Winston and Harold tropical cyclones and the COVID-19 pandemic all indicate that most transfers were spent on essentials, such as food, materials to repair dwellings, clothing, medicines and school supplies (Ivaschenko *et al.*, 2020; PRCWG, 2022a, 2022b). A brief about the COVID-19 pandemic household cash transfer in Timor-Leste also found that most of the money was spent on food for the family, followed by business investment, clothing, transport and household items (The Asia Foundation, 2020). A study of the impact of government solidarity pensions in Timor-Leste also shows that recipients spend the payments on essential items and not on any additional conspicuous consumption (Housen *et al.*, 2012).

While a body of evidence shows that cash transfers do not necessarily lead to spending on temptation goods in the Pacific and Timor-Leste, much of this evidence draws on emergency scenarios, concentrated in a few geographic locations (particularly Fiji). However, some conflicting evidence from a study in Samoa on the non-contributory old-age pension indicates that men may spend a substantial proportion of their pension on cigarettes (Taua'a, 2011).

The second perception – that transfers are fully consumed rather than invested – was not commonly referenced in the literature for the Pacific and Timor-Leste. As already outlined, the evidence shows transfers are typically used for daily needs rather than temptation goods. In relation to investment, a study on remittances in Tonga found that most recipients used the money to pay for utilities, church offerings, food and traditional celebrations, while few spent the money on repaying loans or mortgages (Manu *et al.* 2016). However, the evidence on this issue is limited.

Overall, more research is needed to better understand the spending behaviour of social protection beneficiaries, particularly in non-emergency situations and across a broader range of locations.

Dependency, fertility and economic impacts

Perceptions three, four and five from Handa *et al.* (2018) did not surface in our review of evidence for the Pacific and Timor-Leste. This does not mean that these perceptions are not present in the region nor does it indicate whether they are true or false. More research is needed to find out if these perceptions are present in the Pacific and Timor-Leste and whether the evidence supports or refutes them.

Fiscal sustainability

Perception six – that transfers are fiscally unsustainable – is raised in the literature relating to the Pacific and Timor-Leste. Fiscal constraints are a major concern for the sustainability of the social protection system in Timor-Leste since it relies on the Petroleum Fund for finance and with oil prices declining this funding source is under pressure (ADB, 2018). Likewise, fiscal constraints following the COVID-19 pandemic are identified as a risk to the sustainability of social protection in

several Pacific Island countries, including the Cook Islands, Kiribati, Tuvalu and the Federated States of Micronesia (Boumphrey *et al.*, 2022). Fiscal constraints also influence program design, for example, a policy brief on potentially introducing a non-contributory old-age pension in Papua New Guinea highlighted that the eligibility age would depend on the ‘fiscal space’ or budget available (World Bank, 2013).

Further research

Overall, more research is needed on these (and other emerging) perceptions relating to social protection in the Pacific and Timor-Leste. As Handa *et al.* (2018:260) assert:

‘To the extent that such perceptions are utilized—or inform underlying assumptions—in policy debates, they constrain governments’ policy decisions in the area of poverty reduction.’

As the limited evidence cited shows, the findings relating to these perceptions varies across time and locations. This suggests we need to establish context-specific evidence to address unfounded concerns or to adapt programs if these concerns are substantiated in the evidence.

5 Key voices on social protection

Section 5: Key findings

The literature on social protection in the Pacific and Timor-Leste is dominated by ‘external’ voices and perspectives, particularly those of multilateral organisations (UN agencies, the ADB and the World Bank). A small proportion of publications that surfaced in the evidence review were authored by Pacific governments, organisations or individuals.

Multilateral organisations have tended to focus on formal social protection systems, particularly assessing their effectiveness, although they acknowledge informal social protection in some studies.

Pacific organisations and authors are more likely to acknowledge and discuss the importance of informal social protection but not to the exclusion of formal social protection measures.

All authors focus on the Pacific and Timor-Leste’s exposure to natural hazards and climate change. Multilateral organisations are more likely to highlight the need for formal social protection measures and economic stimulus to be climate-resilient, whereas Pacific organisations and authors are more likely to emphasise the role of pre-existing informal social protection mechanisms in shock responses.

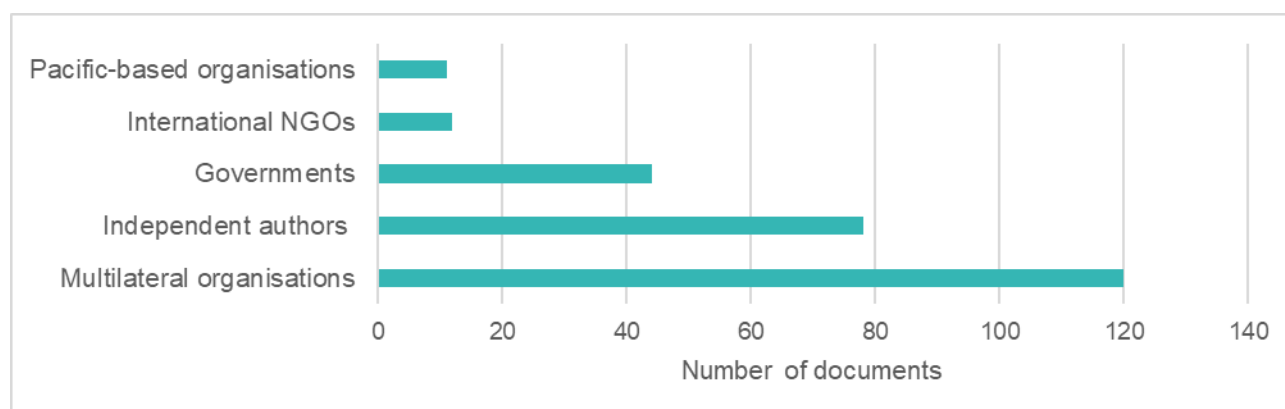
All categories of authors emphasise the importance of social inclusion in social protection, with multilateral organisations emphasising gender disparities and gender-responsive social protection.

In this section we examine the key voices on social protection in the Pacific and Timor-Leste and their findings. First, we analyse the authorship of the documents included in the *Annotated Bibliography*, demonstrating the prominence of multilateral organisations in the literature on social protection in the region. Second, we present the key points of contrast and convergence in the narratives of different categories of authors – multilateral organisations, governments, non-government organisations and Pacific organisations and authors – focusing on: formal and informal social protection; shock-responsive and climate-resilient social protection; and inclusive social protection.

5.1 Author coverage in the *Annotated Bibliography*

The *Annotated Bibliography* catalogues the organisations and independent authors who have contributed to the published literature on social protection in the Pacific and Timor-Leste since 2010. Figure 7 shows the number of publications by author or publisher category.¹⁹ Multilateral organisations dominate with 120 publications in total, followed by independent authors²⁰ (78 publications), governments (44 publications), international non-government organisations²¹ (12 publications) and Pacific-based organisations²² (11 publications).

Figure 7: Number of publications in the *Annotated Bibliography* by author or publisher category²³



Source: Sustineo (2023)

Figure 8 breaks down these figures by specific organisation, again showing that multilateral organisations dominate, particularly the Asian Development Bank (ADB) (43 publications), the World Bank (27 publications), United Nations Economic and Social Commission for Asia and the Pacific (UN ESCAP) (17 publications), other UN agencies (16 publications) and the International Labour Organization (ILO) (9 publications). We do not break down the independent author category by author ethnicity as this would be problematic, for example, because some Pacific academics write primarily from their disciplinary perspective rather than from a regional

¹⁹ The 'author/publisher' category reflects the source the publication is attributed to. In cases where individual authors are listed but the document was published by an organisation (common for World Bank, ADB and other multilateral organisations), the document was counted towards the organisations' publications.

²⁰ Independent authors are mostly academics who have published journal articles, academic books and book chapters. These include several Pacific scholars.

²¹ International non-government organisations are Save the Children (9) and Oxfam (3).

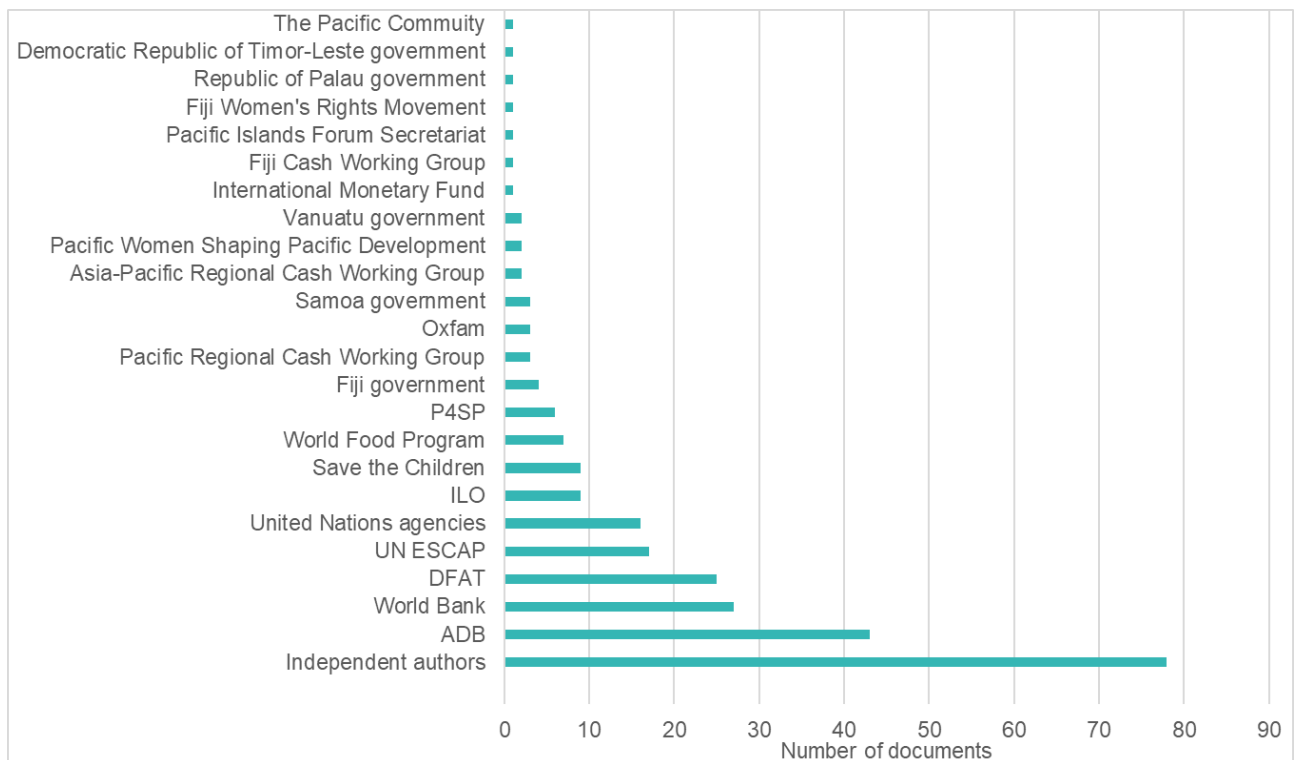
²² Pacific-based organisations are represented by the Pacific Regional Cash Working Group (3), Asia-Pacific Regional Cash Working Group (2), Fiji Cash Working Group (1), Pacific Islands Forum Secretariat (1), Fiji Women's Rights Movement (1), Pacific Women Shaping Pacific Development (2), The Pacific Community (1), Pacific Disability Forum (0), Pacific Islands Association of Non-government Organisations (0), Rainbow Pride Fiji (0).

²³ In the *Annotated Bibliography* co-authored publications have been attributed to each author separately. For example, if a document was co-authored by the World Bank and the Fiji government, then both authors have had one publication assigned to them.

perspective. For this reason, Pacific-based organisations could better represent Pacific voices and perspectives but we also discuss the perspectives of some prominent Pacific scholars.

Australian Department of Foreign Affairs and Trade (DFAT) is another prominent organisational author (33 publications), both through its own publications and through publications from the programs it funds.²⁴ The evidence scan process surfaced few publicly-available documents authored or funded by the Pacific and Timor-Leste governments – four by the Fiji government, three by the Samoa government, two by the Vanuatu government and one each by the Republic of Palau, Democratic Republic of Timor-Leste and the Papua New Guinea governments. Notably, Fiji, Samoa, Timor-Leste and Papua New Guinea are the only countries in the Pacific and Timor-Leste with publicly-available social protection strategies or policies (see Fiji Ministry of Women, Children and Poverty Alleviation, 2021; Samoa Ministry of Finance, 2023; Papua New Guinea Department for Community Development and Religion, 2015; Timor-Leste Ministry of Social Solidarity and Inclusion, 2021). Considering the volume of authored or funded publications highlights the predominance of ‘external’ voices in the current published literature on social protection in the Pacific and Timor-Leste.

Figure 8: Number of publications in the *Annotated Bibliography* by author or publisher



Source: Sustineo (2023)

Notwithstanding the Pacific academics included in the independent authors category, a handful of multilateral organisations collectively account for a significant proportion of the literature published on social protection in the Pacific and Timor-Leste, with a corresponding under-representation of

²⁴ The total includes publications by DFAT-funded partners such as P4SP and Pacific Women Shaping Pacific Development (now Pacific Women Lead).

Pacific organisations and individuals. This has implications for how the key narratives and debates in the literature are shaped and framed and we examine this in the next section.

5.2 Key points of contrast and convergence

In examining the literature from multilateral organisations, governments, non-government organisations, Pacific organisations and independent authors we noted some areas of distinction and convergence in the discourse surrounding social protection in the Pacific and Timor-Leste that we discuss in this section.

Formal and informal social protection

Multilateral organisations frame social protection primarily in terms of formal social protection mechanisms and, in particular, social insurance, social assistance and labour market programs. They focus on assessing the effectiveness of these systems so the Social Protection Index or Indicator (SPI) introduced by the ADB features prominently in these publications.

In contrast, Pacific organisations and authors concentrate on understanding the intersections and possible complementarities between formal and informal systems, as well as the value of these two approaches, as discussed in section 4.5. Ratuva (2010, 2014) critiques the external actors' emphasis on formal social protection – including the normative frameworks underpinning this perspective – and their concomitant failure to recognise the importance of informal systems of social protection grounded in Pacific cultures and traditional institutions. Ratuva (2014) highlights the socio-cultural context of Pacific nations and the essential role of informal social protection networks in underpinning resilience and adaptability.

While studies by organisations from outside the region focus on formal mechanisms, some multilateral organisations also examine informal social protection structures. United Nations Children's Fund (formerly United Nations International Children's Emergency Fund, UNICEF) and UN ESCAP contribute significantly here (see Anderson *et al.*, 2017 and UN ESCAP, 2021a). However, they primarily frame informal systems in terms of their inadequacy or their conflict with formal systems and stress the need to enhance formal social protection mechanisms.

One ADB (2017) report on Vanuatu recognises the value of both social assistance and informal social protection mechanisms and their respective roles in safeguarding vulnerable populations. DFAT is another example of an organisation that has published several reports on the importance of designing and implementing formal social protection systems in ways that support and complement existing informal systems (AusAID, 2012a; Calder & Tanhchareun, 2014; Ismail *et al.*, 2011; Kidd, 2012; The Asia Foundation, 2020). These studies suggest that by first understanding the strengths and weaknesses of the informal systems, formal social protection can be designed to enhance and strengthen these systems. These studies advocate for approaches that recognise the value of both formal and informal mechanisms.

Some publications by Pacific organisations also engage with formal social protection measures, for example, through the Asia-Pacific Regional Cash Working Group (APRCWG), the Pacific Regional Cash Working Group (PRCWG) and the Fiji Cash Working Group. These groups are particularly concerned with social assistance in the form of cash and voucher assistance (CVA) programs (see APRCWG, 2019; PRCWG, 2022a; Walton-Ellery & Low, 2022). These publications explore the

efficacy and potential of cash and voucher assistance programs in the region, their feasibility, the role of blockchain technology and electronic voucher systems and their links with national social protection systems. They commonly highlight the need for early action in response to climate-related disasters and crises.

Shock-responsive and climate-resilient social protection

All categories of authors recognise the particular vulnerability of the Pacific region to natural hazards and climate change impacts but multilateral organisations tend to emphasise the formal social protection measures that Pacific countries implement in response to external shocks, including the COVID-19 pandemic (see for example, Aelbers *et al.*, 2020; Costella & Ivaschenko, 2015; UNDP, 2014; World Bank, 2023). These measures include wage subsidies, unemployment support, targeted assistance, cash-for-work programs and food security funding although UN ESCAP (2014) acknowledges the role of remittances as a form of informal social protection that is important for recovery. Recent studies of the COVID-19 pandemic and social inclusion highlight the impacts of response measures on people in poverty and marginalised groups, including women, people with disabilities and ethnic minorities (ADB, 2022b; UN ESCAP *et al.*, 2022).

Multilateral organisations emphasise the need to integrate shock-responsive social protection into the wider social protection framework (Burton *et al.*, 2015; UN ESCAP and the Ministry of Natural Resources and Environment of Samoa, 2020). The relatively few Pacific government publications echo this call to make social protection mechanisms more responsive to both climate-related and other types of shocks. They also highlight the need to integrate disaster risk factors into social protection program design (see for example, Government of Fiji and World Food Programme, 2017; Handino, 2018; Rafisura *et al.*, 2020). The cash working groups mentioned in the previous section emphasise the role of cash and voucher assistance in disaster and shock response, a focus that characterises international non-government organisation publications (see for example, Holt & Hart, 2019; Save the Children, 2019). However, a DFAT paper by Costella and McCord (2023) calls for a broader approach to social protection and climate change, conceptualising a wider variety of risks and timelines compared to the more standard focus on climate extremes, shocks and disasters.

In contrast, several Pacific authors emphasise the value of pre-existing informal structures while recognising that formal social protection mechanisms are important in the context of shocks and disasters (see for example, Finau & Kant 2021; Gounder 2022; Ratuva 2010, 2014). They highlight the unique contribution that informal systems make to community support during challenging times, informed by the flexibility and adaptability of traditional practices within Pacific communities.

Inclusive social protection

Authors in all groups stress the need for socially-inclusive social protection. A core narrative for multilateral organisations is the need for inclusive and equitable social protection considering that women, people with disabilities and other vulnerable groups face disproportionate challenges (see section 4.6 on social protection and GEDSI). Gender disparities within the Pacific's social protection systems and the need for gender-responsive approaches are consistently highlighted (ADB, 2019, 2022b; Aelbers *et al.*, 2019; UN ESCAP, 2014; UN Women, 2015). These themes of inclusion and equity are prominent in DFAT-commissioned publications (for example, see: Sibley *et al.*, 2014; The Asia Foundation, 2020), as well as those from the Fiji Women's Rights Movement

(2019) and the Pacific Women Shaping Pacific Development Program²⁵ (2017, 2021), indicating that these multilateral, regional and national organisations are all aligned on these issues. A DFAT-commissioned study on recognising the needs of people with diverse sexual orientation, gender identity, gender expression and sex characteristics is unique in its focus and covers three case study countries, including Fiji (Edge Effect, 2021). The Asia Foundation (2020) also analysed the accessibility of social protection for people in these groups in Timor-Leste but it was not the focus of the study. Publications from Save the Children are concerned with how children and younger people are included in social protection and whether formal social protection affects childhood development (see Barrett *et al.*, 2023; Save the Children, 2023).

Publications from DFAT and Pacific organisations and authors all stress the need for country-specific, context-driven and culturally-sensitive approaches. A prominent theme in a series that DFAT published in 2021 is the role of social transfers in achieving equitable health and education outcomes. The series carried out case studies in Kiribati, Samoa, Solomon Islands and Vanuatu using micro-simulation analysis (Amosa & Samson, 2012; Kidd, 2012; Samson & Miller, 2012). These studies highlight how the effectiveness and efficiency of social protection interventions vary in different contexts and provide insights into how to tailor social protection measures to specific country needs to best achieve equity and poverty reduction outcomes.

²⁵ Acknowledging the financial support of DFAT, the Pacific Women Shaping Pacific Development Program (now Pacific Women Lead) is regarded as a pertinent Pacific organisation.

6 Gaps in research on social protection in the Pacific and Timor-Leste

Section 6: Key findings

Geographic coverage of the literature is highly variable. Pacific and Asia-Pacific regional-level analysis is common but sub-regional coverage is dominated by Melanesia, with Polynesia and Micronesia receiving less attention. At the country level, Fiji, Vanuatu and Timor-Leste have the most coverage in the literature. Some Pacific Island countries and territories receive little attention, particularly American Samoa, French Polynesia, Guam, Northern Mariana Islands, New Caledonia, and Wallis and Futuna.

Variations in geographic coverage of the evidence may reflect several factors, including:

- the level of investment and programming on social protection in that country
 - the presence of overseas development assistance (ODA) programs
 - disaster risk levels.
- In terms of program type: labour market programs receive the least attention in the evidence, social assistance receives by far the most attention, followed by social insurance. Informal social protection was also well represented in the literature, with a coverage level equal to social insurance.

Coverage of cross-cutting themes in the evidence was weakest for climate-resilient social protection and humanitarian assistance. The literature focused on shock-responsive social protection, gender and other social inclusion issues, aligning with governments and development partners' growing policy attention in these areas.

Discussions of cross-cutting themes often focus on challenges or the need to expand or strengthen these kinds of social protection, rather than on sharing good practices or evidence about the effectiveness of existing policies.

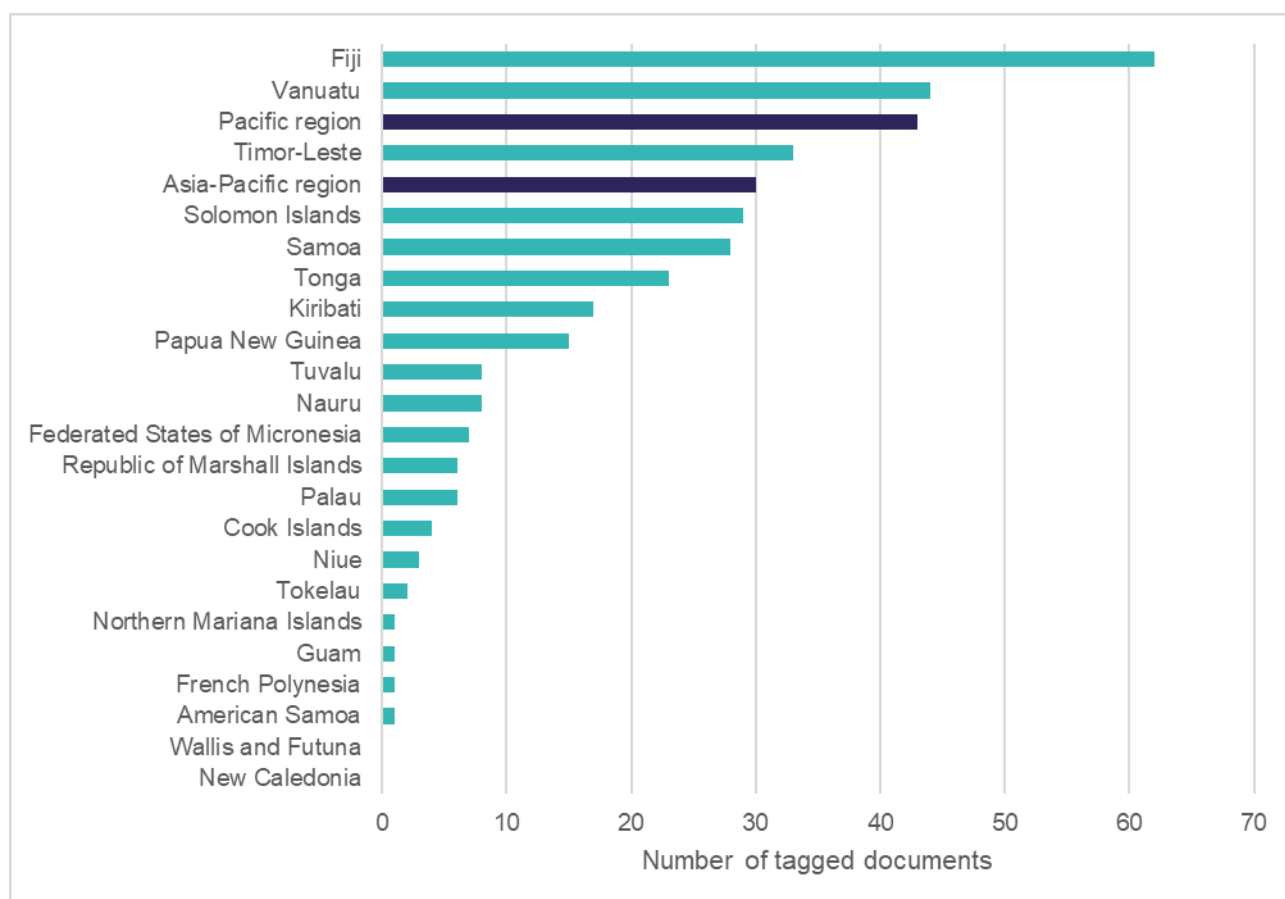
In this section we assess the research gaps in the literature that we reviewed and suggest reasons for these gaps.

6.1 Geographic coverage

Figure 9 shows regional and country coverage in the *Annotated Bibliography*. Fiji has the most coverage in the literature with 62 publications, followed by Vanuatu (44), Timor-Leste (33), Solomon Islands (29) and Samoa (28).²⁶

Some locations are not well covered in the evidence, with American Samoa, French Polynesia, Guam and the Northern Mariana Islands each having one tagged resource. Niue, Tokelau and Cook Islands are also under-represented with less than five resources each. No publications refer to New Caledonia and Wallis and Futuna but this may be because we excluded non-English language publications from the literature search criteria (this also applies to French Polynesia). However, coverage of the two regions in the list, Pacific and Asia-Pacific, is extensive and they rank third and fifth respectively in terms of the number of publications tagged to them.

Figure 9: Geographic coverage in the literature by regions and individual countries

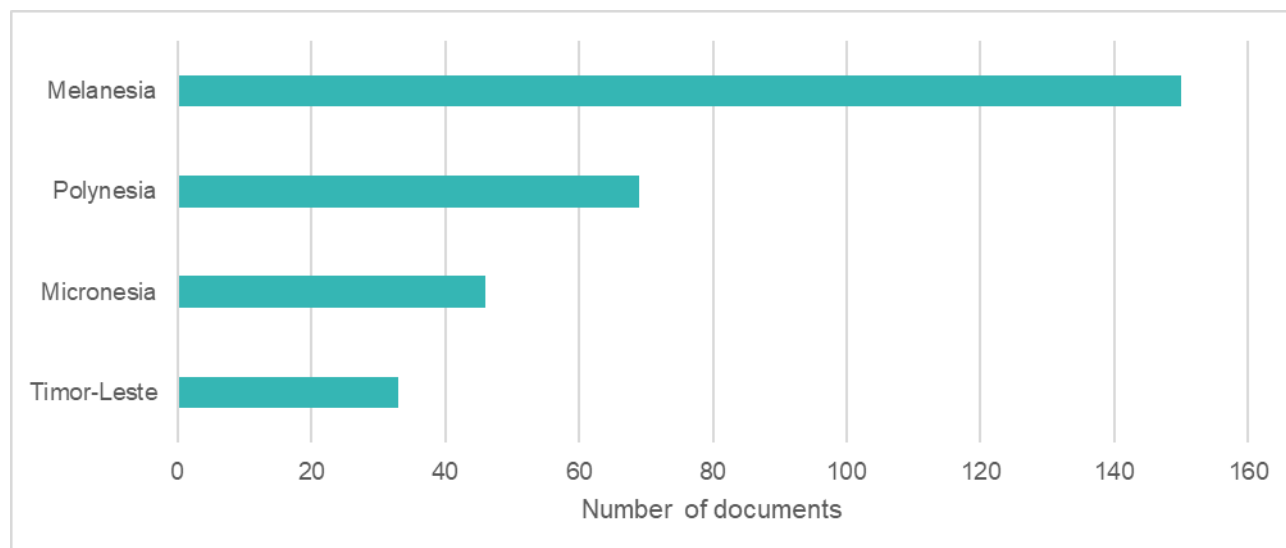


Source: Sustineo (2023)

²⁶ The ‘number of publications’ is based on the number of articles tagged with the relevant geographic, thematic or program type tag. Since one document may have multiple tags across each category (for example, it covers both Solomon Islands and Vanuatu), totals may be greater than the number of documents included in the *Annotated Bibliography*. This applies to the rest of section 6 in relation to the number of documents or publications.

Figure 10 shows the distribution of publications by sub-region (based on consolidating country-level tags rather than analysing the sub-regional scale). Melanesia stands out with the highest number of resources (150), followed by Polynesia (69) and Micronesia (46). This shows the greater concentration of research is on Melanesia, reflecting the extensive coverage of Fiji and Vanuatu in the literature.

Figure 10: Geographic coverage in the literature by sub-regions



Source: Sustineo (2023)

Understanding the coverage by country and region

The relatively extensive coverage of the Pacific and Asia-Pacific regions reflects the predominance of development partners, especially multilateral organisations, in the published literature, as discussed in section 5. These organisations tend to privilege regional studies. This may also partly relate to the in-country presence of United Nations agencies and multilateral development banks (ADB and World Bank) that has grown over the last few years.

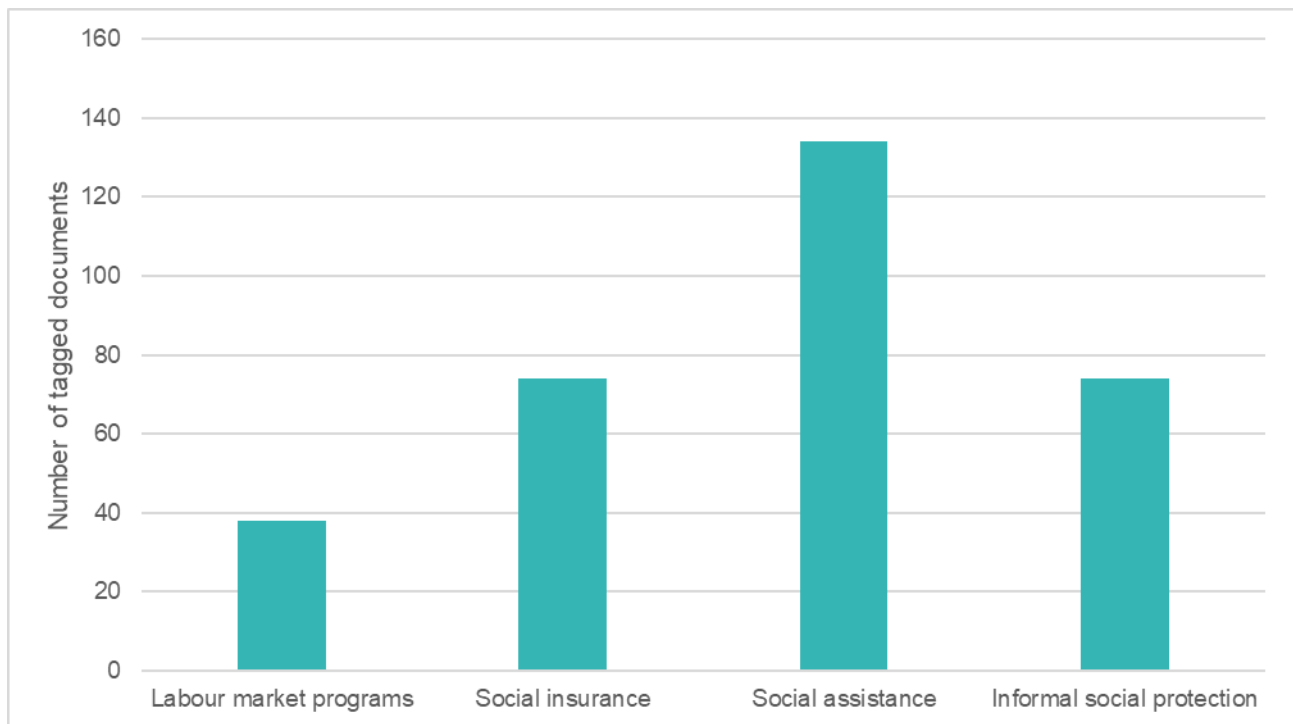
Coverage of particular countries and territories in the literature is influenced by a variety of interrelated factors. Countries actively investing in social protection, such as Fiji, Timor-Leste and Kiribati, seem to feature more. Coverage also correlates with the presence (though not necessarily volume) of overseas development assistance programs and, more broadly, with Australia's focus countries, as this contributes to social protection programs being researched and implemented in these locations. Disaster risk is another factor as humanitarian actors and responses, including cash and voucher assistance, are more likely to be present in countries at greater risk.

The extensive coverage given to Fiji could reflect: its position as the regional and international hub for the Pacific; its relatively well-developed social protection system (owing partially to strong engagement from multilateral organisations); and its relatively strong domestic research and policy capacity and environment. The reasons for the relatively high coverage given to Vanuatu are less obvious, considering its limited formal social protection system beyond its provident fund. However, in our review, Vanuatu was included in multi-country studies and studies on disaster risk. Despite their limited formal social protection systems, both Solomon Islands and Papua New Guinea are relatively well covered in the literature, typically in studies on the need to expand social protection systems and in multi-country and regional studies.

6.2 Program type and thematic coverage

We can categorise social protection into four main types: social insurance, social assistance, labour market programs (the three main categories of formal social protection) and informal social protection, as discussed under section 3. Figure 11 shows the overall coverage of these program types in the *Annotated Bibliography*.

Figure 11: Program type coverage in the *Annotated Bibliography* literature

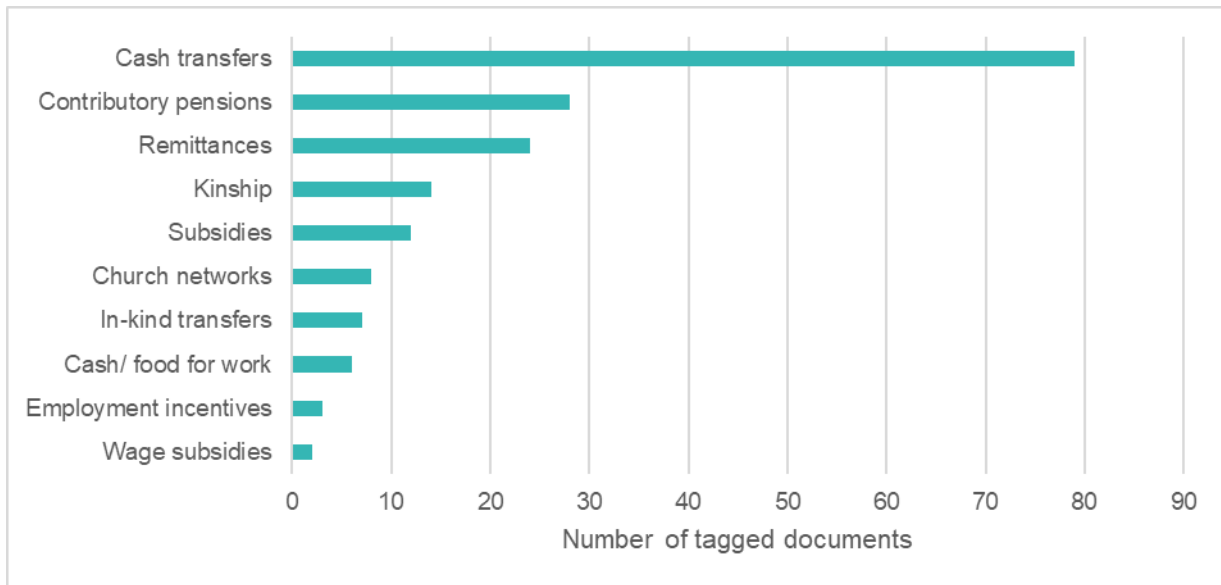


Source: Sustineo (2023)

Social assistance has the most coverage in the published literature with 134 publications, followed by informal social protection and social insurance (both with 74 tagged documents) and finally labour market schemes (38). The combined coverage of the three main forms of formal social protection (246 publications) far outweighs the coverage of informal social protection (74 publications).

Under the program types, we also tagged specific social protection mechanisms as sub-categories (Figure 12) and those most commonly discussed were: cash transfers (79 tagged documents); contributory pensions (28); and remittances (24). We also had a social protection overview category for publications that discuss the concept of social protection rather specific types or categories (57 tagged documents).

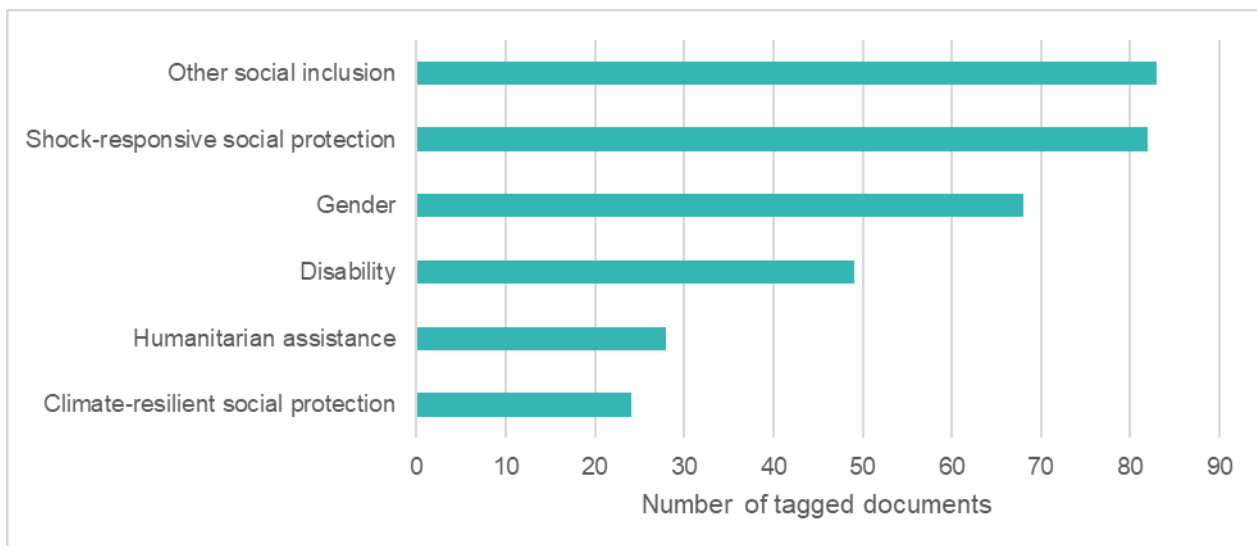
Figure 12: Coverage of specific social protection mechanisms in the *Annotated Bibliography*



Source: Sustineo (2023)

We also tagged documents according to their coverage of specific cross-cutting themes (Figure 13) and found the following dominant themes: other social inclusion (83); shock-responsive social protection (82); and gender (68). However, climate-resilient social protection (25) had the least coverage.

Figure 13: Coverage of cross-cutting themes in the *Annotated Bibliography*



Source: Sustineo (2023)

Understanding the coverage by theme and program type

The predominance of external actors in the published literature means that the focus is on formal, as opposed to informal, social protection. While external actors, especially multilateral

organisations, acknowledge informal social protection measures, they often highlight their inadequacy and stress the concomitant need for expanded formal systems (see section 3).

Social insurance also receives less coverage in the literature compared to social assistance although social insurance remains the most common form of social protection in the Pacific and Timor-Leste (as discussed in section 4). This is probably because overseas development assistance investment typically focuses on social assistance rather than social insurance and donor-funded research agendas are shaped accordingly.

The emerging themes of shock-responsive social protection, gender and other social inclusion issues that are receiving growing policy attention are well covered in the literature. However, the coverage tends to be on the challenges that marginalised groups face and the difficulties the stakeholders encounter in responding to climate shocks and disasters. The lower coverage of climate-resilient social protection suggests this concept is still nascent. Overall, more research on sharing good, evidence-based practices could help governments respond to these needs and challenges more effectively.

7 Implications for future research

In this section we examine the implications of the *Evidence Review* and recommend areas for future research on social protection in the Pacific and Timor-Leste. We developed the recommendations by considering the current research gaps (identified in section 6) and outlining ways to address these gaps in a future research agenda.

Bolster Pacific voices and perspectives

A key finding from the evidence review is the predominance of multilateral organisations and development partners in the existing published literature on social protection in the Pacific and Timor-Leste, and the corresponding under-representation of Pacific and Timorese voices and perspectives. This has several implications:

- Studies conducted by multilateral organisations often privilege the Pacific or Asia-Pacific regional scale at the expense of detailed country studies.
- These studies tend to focus on formal or government-led social protection and pay less attention to informal forms of social protection and the interaction between the two.
- The studies are also grounded in global norms and approaches, and take a broadly ‘Western’ world view. The relatively few publications from Pacific authors suggest that this may be at odds with Pacific understandings and conceptions of social protection.

Therefore the literature needs to be better balanced by supporting and promoting research by Pacific and Timor-Leste organisations and individuals.

Recommendation 1: Provide strong support for Pacific and Timor-Leste authors and organisations in contributing to evidence and discourse on social protection in the region.

Improve coverage for those outside the formal workforce

The literature demonstrates that social protection systems in the Pacific and Timor-Leste generally do not effectively cover those outside the formal workforce and thus disadvantage a large and often vulnerable proportion of the population. Further research is needed to better understand: how to protect people in this situation; what impacts and change pathways social protection can have; and which policy and programming levers will be most effective in the various Pacific and Timor-Leste contexts.

Recommendation 2: Support research to understand the impacts and change pathways of social protection, with a particular view to identifying ways to improve coverage for people outside the formal workforce.

Shift the focus to informal systems of social protection and how they interact with formal systems

The *Evidence Review* shows that informal forms of social protection are critical in the Pacific and Timor-Leste, especially in strengthening resilience to shocks. Also, formal social protection benefits may be shared within or between households via informal networks but these relationships are not well studied. We need to better understand the intersections and possible complementarities between formal and informal social protection systems but this remains a major gap in the literature in the Pacific and Timor-Leste, as well as globally. Key areas for further research are: how formal and informal systems interact; where these systems are complementary; and whether there are any potential conflicts.

Recommendation 3: Support research to better understand informal systems of social protection and their interactions with formal social protection systems in the Pacific and Timor-Leste.

Identify the intersections between social protection and gender equality, disability and social inclusion

Gender-responsive and disability-inclusive social protection are receiving increasing policy attention in the Pacific and Timor-Leste, and are also emerging themes in the literature. However, we need further research on how to design and implement effective gender-responsive and disability-inclusive social protection. This includes understanding how social protection may affect intra-household dynamics in different contexts, particularly in relation to gender-based violence. Another key area for further research is social inclusion of other groups (such as: children and young people; people with diverse sexual orientation, gender identity, gender expression and sex characteristics; and people with diverse ethnicities).

Recommendation 4: Build a base of evidence on how social protection systems can affect intra-household dynamics and how programs can be best designed to be gender-responsive, disability inclusive and socially inclusive.

Explore the wider economic benefits of social protection programs

Pacific countries and Timor-Leste are facing fiscal constraints that are particularly evident after the COVID-19 pandemic. This warrants further research to investigate and understand social protection as an economic investment as opposed to a cost for governments. Evidence is currently lacking but research questions could include: *What is the return on investment for social protection?* and *How does social protection contribute to economic growth?* Building an evidence base on the wider national economic benefits of social protection expenditure will encourage governments to expand and deepen their social protection commitments.

Recommendation 5: Investigate the economic return on investments in social protection systems to better understand their benefits relative to costs for governments in the Pacific and Timor-Leste.

Explore social protection in relation to climate change

The literature is increasingly focusing on the role of social protection in responding to shocks, particularly as the impacts of climate change are more evident. Given that the Pacific and Timor-Leste are highly vulnerable to the impacts of climate change, research in this area is vital. This includes understanding how social protection can play a role in the design and implementation of climate change financing initiatives. This is to ensure that climate adaptation or mitigation and disaster preparedness funding, as well as loss and damage compensation, reach the most vulnerable households and communities.

Recommendation 6: Support research to understand the relationship between climate change and social protection in the Pacific and Timor-Leste.

Further research on perceptions about social protection

Global perceptions about social protection may also be present in the Pacific and Timor-Leste, as discussed in section 4.7. Although some evidence is available to both support and refute some of these perceptions in the context of the Pacific and Timor-Leste, we need more robust investigation in relation to these perceptions to understand how they may affect decision making. We need to identify and investigate any other common perceptions in the region, especially those not listed under section 4.7.

Recommendation 7: Support research to build an evidence base on how far common global perceptions about social protection apply in the Pacific and Timor-Leste, and to unearth any additional perceptions not yet identified in the literature.

Explore opportunities to leverage the progress engendered by the COVID-19 pandemic

The COVID-19 pandemic led to an unprecedented focus and increased spending on social protection in the Pacific and Timor-Leste, as well as globally. Experts suggest that countries now face a ‘tipping point’ in terms of the future trajectories of their social protection policies (Beazley *et al.*, 2021) and research is needed on how to sustain this positive trend. The Pacific and Timor-Leste need to identify the lessons learned from the social protection schemes they introduced and/or expanded during the pandemic and decide how to take them forward to inform their long-term social protection systems.

Recommendation 8: Support research and evaluation of the social protection responses to the COVID-19 pandemic within the Pacific and Timor-Leste to draw out lessons for longer-term social protection systems in the region.

Share lessons from Pacific countries whose social protection programs are well developed

Our review highlighted the social protection systems that exist across the Pacific and Timor-Leste but also how they vary across the region. Many systems are underdeveloped and offer limited coverage. While lessons can be gleaned from more developed economies globally, there is potential to look at what social protection lessons can be learned within the region, particularly from those countries in the region with more developed systems.

Recommendation 9: Identify opportunities for learning between countries within the Pacific and Timor-Leste on how to enhance and support social protection systems, cognisant of the interactions between formal and informal systems.

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