



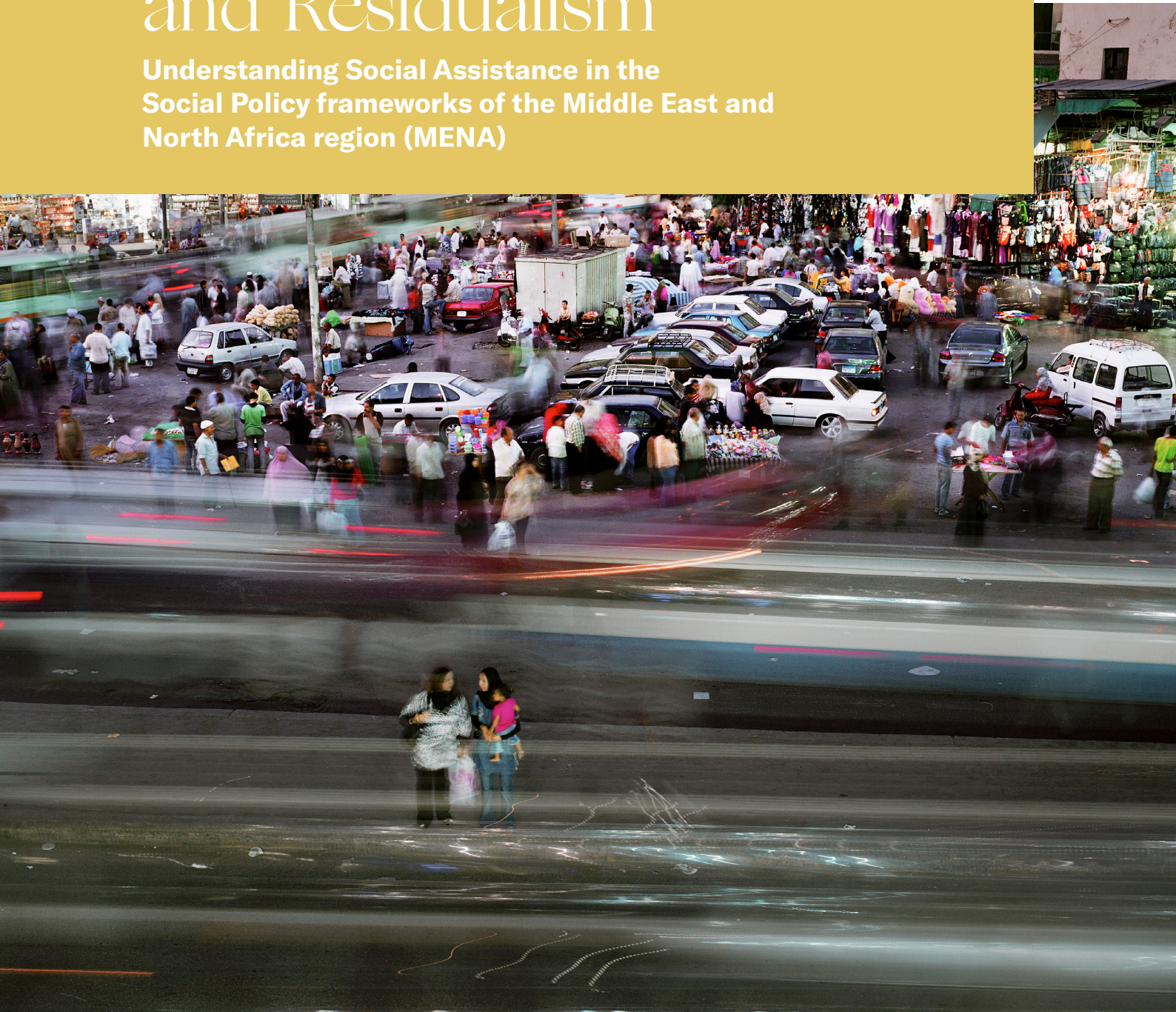
MENASP

middle east & north africa
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Policy Innovation Case Studies No. 3

Between Benevolence and Residualism

**Understanding Social Assistance in the
Social Policy frameworks of the Middle East and
North Africa region (MENA)**





Summary

This PICS situates social assistance programmes in the MENA region historically and institutionally, as part of the twin efforts to deliver social protection to vulnerable groups (most typically orphans and poor female-headed households) and influence political allegiances of communities aligned around nationalist, sectarian, religious or tribal ties. The aim of the PICS is to explain the well-established policy rationale for social safety nets and social assistance in MENA countries in order to offer a more holistic interpretation of its pros and cons as a contemporary policy instrument. The PICS does this by taking into account the long history of non-state social welfare action in MENA countries and the overriding norms that favour family-based (largely male-breadwinner), tradition-oriented or religiously informed views

of social welfare. This helps to contextualise the current rise of interest in non-contributory social assistance better as part of the wider SDGs 2030 agenda. The key innovation highlighted in the PICS is that there is a well-established tradition of benevolence and non-state philanthropic activity in MENA countries which could be better harnessed to support the universalist aspirations of the SDG 2030 agenda. As key actors in the public sphere, civil society groups and philanthropic individuals may also exercise influence on state and corporate actors who hold the keys to political and economic development in MENA countries. The ability of such private actors to enjoy political legitimacy through for example, holding public office in MENA governments is an area of long-standing contention that deserves further research.

Introduction

The paper invites the reader to re-consider the history and rationale of social assistance provision in the MENA region as a form of social capital and an important resource that can promote redistribution and support the social and economic inclusion of vulnerable members of society. The paper makes the proposition that civil society and philanthropic activism in the MENA region can form the basis of social renewal in this politically volatile region especially in cases where social protection support is offered across religious, ethnic, political and geographic divisions. This can help foster a more inclusive approach to social protection as part of a future SDGs 2030 agenda.

Policy background

The arrival of the idea of social protection (more specifically, non-contributory social protection programmes) as a form of policy intervention in the MENA region after the events of the 2011-2012

Arab uprisings is welcome. The drivers of this were international donor agencies seeking to address the humanitarian challenges of the recent Syrian conflict as well as address the rising budget deficits of MENA states. This is not to say that MENA states did not have social protection systems in place, indeed there are long standing social insurance and social safety programmes in all MENA countries dating back to the independence and post-colonial era. Historically, the high cost of subsidies has resulted in MENA countries having the highest social expenditure on social assistance in the world. Through the new range of development initiatives that are spouting in the name of social protection, MENA countries have the opportunity to improve poor people's access to public services and to protect their most vulnerable populations against social risks. In this sense, MENA now joins the ranks of Latin Americas and Sub-Saharan African countries that have been expanding their state-funded social assistance provision since the

late 1990s. For example, Latin America saw the rise of child-focused conditional cash transfers in the 2000s and Sub-Saharan African countries have implemented social cash transfers targeting mostly those unable to work (e.g. elderly people, disabled persons, orphans and vulnerable children). The Latin American experience, in particular, has been hailed by some policy observers as signalling the rise of a new paradigm of social policy in developing countries that is sensitive to local and political realities. Some commentators also claim that the expansion of non-contributory social assistance (such as social cash transfers, child grants) represents a new form of 'social organisation' that can form the basis of more inclusive citizenship. This association between social protection and wider social policy formulation in developing countries is indeed new in international development but leads to bigger and more fundamental questions about social policy governance and institutional change in low and middle income countries : who is responsible for what/whom? What is to be redistributed in society and how? How do social factors relate to economic growth?

Key policy actors and institutions

Social assistance programmes involve a broad range of policy actors in the state and civil society sector. Often there are also influential families who establish philanthropic associations too and have strong political or economic interests as is the case of the city of Beirut in Lebanon for example, where historical families support major philanthropic organisations such as Dar Al Aytam. There are some long-standing non-contributory social assistance programmes in some countries, such as Morocco and the Palestinian territories, as well as a regime of food and fuel subsidies, which has recently gained attention as a potential reform target to ease budget deficits among Arab governments. Nuclear and extended families have also traditionally played a key role in social support, particularly in caring for dependents such as young children, elderly relatives or disabled family members. In the last decade, however, the family in the MENA region has become a less reliable source of social support due to the widespread incidence of poverty and also the breakdown of family bonds (through higher

divorce rates, for example). Younger women are also more likely to be employed, which has led to greater reliance on private child care or on domestic workers. By far the most significant non-state source of social protection for vulnerable populations, particularly for those employed in the informal sector, are religious welfare organisations. These organisations have been in operation for decades and have become entrenched in their societies. They are often linked to larger networks of schools and hospitals and though they may charge fees for some of their services, they provide both in-cash and in-kind services to extremely poor people. Religious groups tend to rely on religious fund-raising activities, such as during the month of Ramadan, or they might invoke religious teachings on paying zakat, helping orphans and supporting the family as the basic unit of society. In some countries such as Pakistan and Saudi Arabia, zakat is used to fund the main social assistance programmes for people in need such as orphans, the disabled, female-headed households and the poor. The principle of benevolence marks many of these activities and it is a noteworthy trait of Middle Eastern society in spite of the [political turmoil and economic hardship many populations there face.

What is innovative about the problem-solving

Social assistance programmes include a broad range of poverty-alleviation services whose main aim is to treat the symptoms of poverty. Often, they will have consumption smoothing effects or will be temporary and reactive in nature. A household that has lost its main (male) bread-winner, an elderly person or orphan who have no next of kin to look after them, an unemployed father who may need emergency assistance for healthcare. These forms of assistance can occur on a monthly basis, for example in the Tayssir programme where a monthly allowance is paid to households in need. The principle of supporting people in this way shows that in spite of the political turmoil many MENA countries face, there is a persistent capacity to help fellow citizens in need. The question is how can such benevolence be turned into more progressive, cohesive and welfare-enhancing programmes but without the short term and residual connotations of ad hoc reactive social assistance? In some countries, such as Saudi

Arabia and Sudan, Zakat is already collected by the state and helps to fund state provided social safety net programmes. But the role of progressive taxation is a vexed one with over-reliance on VAT hence hitting the poor most.

Can lessons be learnt for the context in question or other contexts?

Although the historical record globally promotes the idea that democracy and left-wing political parties have had the greatest influence on the development of egalitarian and redistributive social policy systems, these factors alone are not sufficient to guarantee universal social protection – their interaction with other drivers such as the role of the private sector in service delivery and the eligibility criteria for programmes also matter. Indeed, universal social protection might also include Skocpol's (1991) concept of "targeting within universalism" as a way of bringing provision of public services to poor populations more in line with the rest of the more affluent population groups, particularly the middle classes. What matters more in producing universal social policies is the "unification" of these policy drivers and the "interaction" of policy components which include "eligibility criteria, funding, benefits, provision and outside options" (Martinez Franzoni and Sanchez-Ancochea, 2016:56–7). A case in point is the island nation of Mauritius, which has a long tradition of tax-funded universal health care akin to the Scandinavian model. Yet, other countries like Uruguay, Costa Rica and South Korea have been able to establish similar systems of universalism based on

social insurance. These more nuanced understandings of what a universal social policy system might look like find earlier expression in the works of Korpi and Palme (1998) who explored various types of welfare systems in the OECD context to ascertain the impact on redistribution and inequality. What emerges as a key theme from these different country experiences is that a major advantage of including the middle classes in social protection programmes is the increased capacity to offset inequality of income (Korpi and Palme, 1998). The review of social assistance in MENA here shows that the middle classes are more likely to be the benevolent actors rather than accessing the same kinds of services as low-income or vulnerable groups in need. The huge demand on resources in deficit-ridden MENA countries means that social assistance can only remain at a minimal level and job creation is not occurring at a sufficient pace to absorb the surplus labour supply. Greater attention to social policy mechanisms in the MENA region can highlight and support the progressive role of non-state benevolent and philanthropic activity.

Brief methodology

The paper is based on qualitative research in various countries spanning several years of research that date back to the early 2000s. This research involved in-depth face-to-face interviews and participant observation in a range of social welfare organisations and government agencies in countries such as Lebanon, Turkey, Morocco, Iran and Oman

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More about the research

Rana Jawad has worked extensively on the social policies and welfare systems of the MENA region for over 15 years. She has particular specialism in Levant and North Africa countries as well as the role of non-state and civil society groups. The research upon which this PICS is based was funded by various sources, including the ESRC and the Carnegie Corporation.

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