



**EXPANDING
SOCIAL
PROTECTION**

Income Security for All Ugandans in Old Age

INTRODUCTION

In many countries, basic income security is recognised as a right to which all citizens are entitled. Indeed, the rights to social security and an adequate standard of living – as well as security in old age – were encapsulated within the Universal Declaration of Human Rights in 1948. In those countries committed to basic income security, the provision of Direct Income Support is established as a core government service, in the same way that health and education are considered essential public services.

Governments across the world also recognize that ensuring basic income security is a very visible means for governments to directly reach their vulnerable citizens, delivering tangible benefits and demonstrating government commitment to upholding the rights and dignity of their population. For this reason, almost all middle and high-income countries – as well as an increasing number of low-income countries – have well established systems to provide income security to sections of their population, including for older people.

All societies place a high value on caring for their older people and ensuring that they live out their lives in dignity. In traditional societies, informal mechanisms exist whereby children and other kin take care of their elders. However, as societies modernise and urbanise, informal care systems tend to break down. In response, in many nations the state steps in to establish formal systems of old age pension to guarantee all people a minimum income in old age. The first country to provide this guarantee was Denmark in the late 1800s and, since then, many countries have followed suit, including a large number of developing countries.

Uganda has a rich tradition of care and respect for the elderly. But, as in all societies, this informal system of support – while still functioning for some – is, for many others, beginning to weaken as a result of poverty, migration, urbanisation and the impact of HIV and AIDs. In response, the government of Uganda – with support from the United Kingdom, Ireland and UNICEF – has taken the first steps in building a pension system for every citizen, with the aim of ensuring that no older person has to live in abject poverty. A pilot scheme – known as the Senior Citizens' Grant (SCG) – is currently being established in 14 Districts to assess the feasibility of providing every older person with a regular and secure cash income. If successful, the government is considering expanding the scheme across Uganda.

As Box 1 indicates, the establishment of a basic pension for all citizens is consistent with commitments in the national Constitution – which states that all citizens have the right to pension benefits – as well as a range of other commitments that Uganda has made on the provision of direct income support and support for the elderly.

Box 1 Commitments by Uganda to older people

Article XIV of The Constitution of Uganda (1995) states that: *The state shall endeavour to fulfill the fundamental rights of all Ugandans to social justice and economic development and shall in particular, ensure that.....All Ugandans enjoy rights and opportunities and access to education, health services... decent shelter, adequate clothing, food security and pension and retirement benefits.* The National Objectives and Directive Principles of State Policy of the Constitution states that “**The State shall make reasonable provision for the welfare and maintenance of the Aged.**”

Social Pensions are one of the main forms of Direct Income Support. Uganda’s National Development Plan (2010-2015) identifies Direct Income Support – referred to as social protection – as a key strategy to bring about social transformation in the country. One of its objectives is to “expand social protection measures to reduce vulnerability and enhance the productivity of the human resource of the country.” Uganda’s National Policy for Older Persons, 2009, includes a **commitment to establish an older persons’ grants scheme.**

Uganda has also expressed its resolve to scaling up Direct Income Support through its endorsement of the Livingstone Call to Action (2006) which asks countries in Africa to put in place costed plans for the implementation of Direct Income Support Schemes, such as a guaranteed pension for all citizens. Uganda is also a signatory to the African Union Social Policy Framework (2008) which calls on member governments to recognize that Direct Income Support is a state obligation and should be provided for in national legislation.

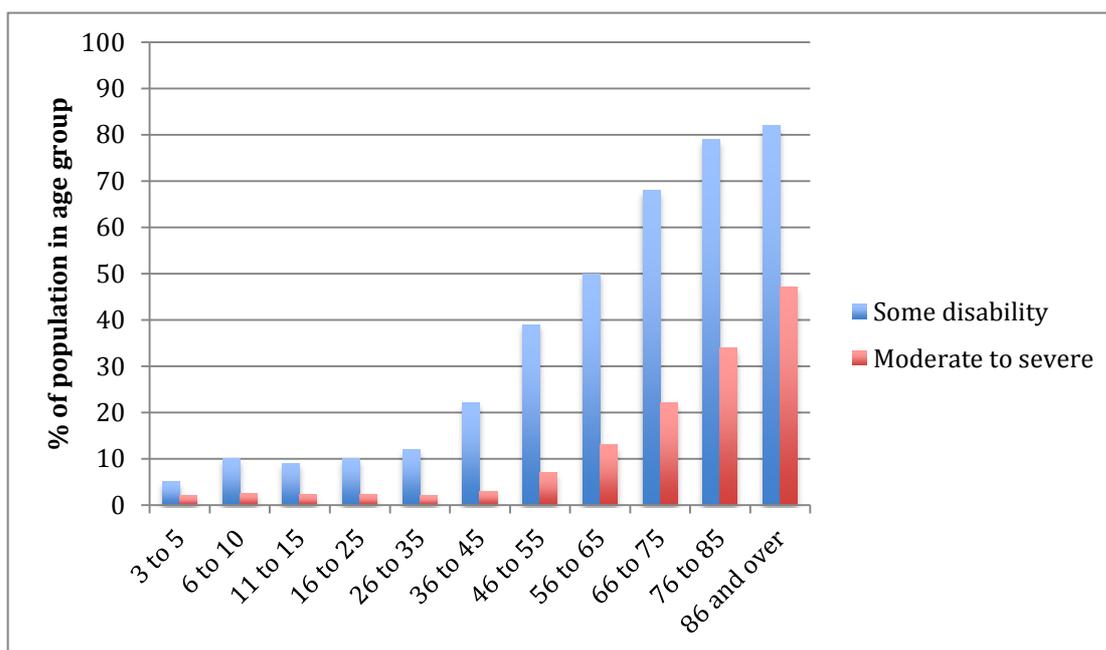
This paper will discuss the value of establishing a universal pension in Uganda. It will begin by considering the challenges currently facing the nation’s older citizens, before moving on to an overview of universal pensions in other developing countries. The paper will examine the evidence on the impacts of these pensions, before briefly describing the SCG and assessing its potential benefits and costs if it were to be expanded to all older citizens. Finally, the paper will argue that it is important to ensure that the pension is accessible to all older people and that its implementation would be a popular and welcome initiative.

CHALLENGES FACING OLDER CITIZENS IN UGANDA

Living a long life is a great achievement and the older people of Uganda have made immense contributions to building and developing the country since independence. This includes participating in various liberation struggles, working through their lives to support the economy, and caring for grandchildren, sons and daughters, especially orphans, many of whom have been affected by HIV and AIDS. Older people continue to guide and inculcate Ugandan cultural values in their children and grandchildren, as well as preserving Uganda’s rich and diverse cultures.

Grandmothers, in particular, play an important role in caring for their grandchildren which enables working age parents to produce food for their families or enter the labour market. Indeed, many older people themselves continue to be active net contributors to the household. Yet, as people age, they gradually become less able to provide for themselves and become increasingly dependent on others. Figure 1, for example, indicates how people in Uganda become susceptible to disability as they age.

Figure 1: Proportion of people in Uganda with a disability, by age group¹



However, it is becoming increasingly evident that traditional systems of support for older people are breaking down in Uganda. Poverty is a major reason, with families struggling to care for both their own children as well as their elderly parents, with younger people often migrating to look for work, leaving their parents behind. According to the 2009/10 household survey, the poverty rate of households with an older person is almost 29%. Yet, this masks the true extent of poverty in old age since household surveys provide only a snapshot in time. In reality, incomes are dynamic with many families moving in and out of poverty. For example, around 85% of active older persons are engaged in crop farming, which is characterised by fluctuations in produce prices, irregular income and low returns to labour. They are also vulnerable to ill health, which can impact severely on their ability to gain an income. So, the true number of older people who are poor or vulnerable to poverty is much higher than 29%.

Older people face other challenges and responsibilities. Around 15% of households have an older person as a member, and almost 72% of older people are heads of households, meaning that they are responsible for others, very often children. A large number of children live in households with elderly

¹ Source: 2009 / 2010 Uganda National Household Survey. Analysis undertaken by MGLSD.

members, yet the poverty rates of these households is much higher - 32% compared to the national poverty rate of 25%. This is not good for children, many of whom suffer from malnutrition and stunting – which harms their intellectual development – and are unable to access sufficient years of education. It is critical that households with both older people and children gain more secure incomes if the intergenerational transmission of poverty is to be tackled.

Poverty is also threatening the dignity of many older people. Older people do not want to be unilaterally dependent on others; they also want to offer something to their families and communities. Yet, many older people are forced to beg others for support and find themselves excluded from kinship and community networks.

Currently 93% of older people in Uganda are not in receipt of a pension or another form of income security. This is a challenge with significant gender dimensions since most older people – 55% – are women who are much less likely to access current pension schemes. Fortunately, experience in other developing countries shows that a solution is possible, one that guarantees everyone a secure income in old age.

INTERNATIONAL EXPERIENCE WITH NON-CONTRIBUTORY PENSIONS

A wide range of developed and developing countries have invested in non-contributory pension schemes, in other words pensions that are financed out of government revenues. They are often referred to as **social pensions**. And, many countries have made the decision to provide these pensions as a guarantee to **all** citizens, in recognition of the contributions that they have made to their families, communities and nations.

A number of developed countries ensure universal pension coverage, including Norway, Sweden, Denmark, the Netherlands, New Zealand and Canada, while the United Kingdom has recently decided to transform its state pension into a universal scheme. However, universal pensions are becoming increasingly common in developing countries, including Africa. Table 1 lists pension schemes that can be found in Africa. Most African countries have chosen to provide a pension guarantee to all citizens, including Botswana, Lesotho, Mauritius, Namibia, Seychelles and Swaziland, while the South African pension reaches nearly 70% of over-60s.²

² Universal pensions – or those guaranteeing universal coverage – can be found in many developing countries such as Bolivia, Botswana, Brazil, Cook Islands, East Timor, Kiribati, Kosovo, Lesotho, Maldives, Mauritius, Mexico, Namibia, Nauru, Niue, Nepal, Samoa, Seychelles, Swaziland, and Thailand.

Table 1: Old age non-contributory pension schemes in Africa

	Pension Amount (US\$ per month)	Pension Amount (% GDP per capita)	Age of Eligibility	Targeting	Number of Pensioners	Cost (% of GDP)
Botswana	\$32	6%	65	Universal	91,000	0.3%
Cape Verde	\$50	19%	60	Poverty	17,500	0.4%
Kenya	\$19	25%	65	Poverty	40,000	0.06%
Lesotho	\$37	43%	70	Universal	80,000	1.3%
Mauritius	\$95	16%	60	Universal	137,000	1.95%
Namibia	\$59	14%	60	Universal	132,000	1.36%
Seychelles	\$181	29%	63	Universal	6,000	1.3%
South Africa	\$144	28%	60	Affluence	2,490,000	1.29%
Swaziland	\$27	10%	60	Universal ³	60,000	0.6%

IMPACTS OF NON-CONTRIBUTORY PENSIONS IN INTERNATIONAL EXPERIENCE

Experiences from many developing countries indicate that social pensions can have a range of positive impacts. Direct impacts on poverty are clear: in South Africa, the poverty gap – a measure of the depth of poverty – in beneficiary households has been reduced by 54% while, in Brazil and Mauritius, pensions have almost eliminated old age poverty.⁴ As a result, older people's food security has improved: in Lesotho, the introduction of the pension led to an increase in the proportion of those never going hungry from 19% to 48%.⁵ It had also enabled half of older people to spend more on their own health.⁶

Evidence from across the world shows that older people are not the only beneficiaries of old age pensions. Children also benefit since the elderly use their pensions to support their young kin. In Namibia, 72% of pension income is shared with others, with over half given to grandchildren.⁷ In South Africa, the pension translates into significant impacts on children: those children in households with pensioners are between 3-5 centimetres taller than others, indicating significant nutritional benefits;⁸ and, in Brazil and South Africa, pensions have led to an increase in school attendance.⁹ In Lesotho, grandparents are using their pension to buy uniforms, books and stationery and pay for school trips for their grandchildren.¹⁰ And, pensioners do not restrict their support to only their own households: they also help grandchildren living

³ In theory, the Swaziland pension is targeted at the poor; in practice, all older people receive it.

⁴ Samson (2006), Gaspirini et al. (2007) and Kaniki (2007).

⁵ Vincent and Cull (2009).

⁶ Croome (2006).

⁷ Devereux (2001).

⁸ Duflo (2000) and Case (2001).

⁹ Samson et al. (2004), Barrientos and Lloyd-Sherlock (2002) and de Carvalho Filho (2000).

¹⁰ Croome (2006).

elsewhere.¹¹ In fact, it appears that children in South Africa, Brazil and Zambia seek to live with pensioners.¹²

Box 2: Nepal's universal pension

Nepal is one of the poorest countries in Asia – with GDP per capita on a par with Uganda – but it has been providing a universal pension since 1997, despite the challenge of one of the world's most difficult terrains. It currently provides around US\$7 per month to everyone over 70 years without access to other income from the state, as well as to certain categories of people over 60 (single women, *Dalits*¹³ and residents in Karnali, the poorest area of the country). Around 1 million people receive the pension and it costs 0.48% of GDP.

The pension has had a significant impact on poverty. Among those aged over 70, the pension has reduced the poverty gap in households by 27%.¹⁴ A recent qualitative study has also indicated the value of the pension.¹⁵ Beneficiaries have prioritised the purchase of food, medical expenses and clothes. Not only are they consuming more food, but they are also accessing a wider variety of food, which may well be good for their health. Pension income is also used to help grandchildren and to invest in agriculture.

As a consequence of the pension, 31% of older people have experienced an improvement in the behaviour of their family towards them. Many also argue that a further positive benefit is that they have become less dependent on others, which is likely to help their self-esteem.

The old age pension in Nepal is very popular, and has the support of 96% of recipients.

As the African Union's Social Policy Framework argues, pensions can also benefit children by reducing fertility rates. Last century, they contributed to significant reductions in fertility in Europe and North America, and there are signs of similar impacts in southern Africa.¹⁶ These reductions are because when people are guaranteed a pension they no longer feel they have to invest in large families to increase their chances of receiving care in old age. The smaller families resulting from low fertility are good for children since resources do not have to be shared so widely.

A fear occasionally expressed about pensions is that they may lead to a reduction in informal family support for older people. Yet, there is no evidence for

¹¹ Cf. Devereux (2001) who indicates that 29% of pensions in Namibia is provided to relatives in other households.

¹² Barrientos and Lloyd-Sherlock (2002) and Kidd S.D. (2011).

¹³ *Dalits* are regarded as the lowest caste in Nepal, experiencing significant social exclusion.

¹⁴ Kidd and Wylde (2011).

¹⁵ NEPAN (2010).

¹⁶ Boldrin et al. (2005), Galaso et al. (2008) and Holmqvist (20**).

this. Instead, older people tend to be re-integrated into informal social care networks. In South Africa, the pension enables older people to share with their kin, thereby strengthening their social networks (Sagner and Mtuti 1999). As one Zambian pensioner has said: “If you have only dust in your hands, then friends are far; when they are full, they come closer.”¹⁷ Mauritius triples the value of its pension when older people reach 90 years (Willmore 2006). While this costs the state very little, as so few people reach 90 years, it is reported as acting as a significant incentive to encourage people to care for the elderly, to try and ensure that they receive the increase.

Importantly, by being able to share with others and no longer having to beg, older people gain significantly in terms of their dignity and self-respect.¹⁸ In Zambia, for example, recipients of the pension invest their cash in building sturdy houses. This not only provides them with shelter, it also means that they no longer have to beg their relatives to repair their houses, which many find demeaning.¹⁹ Furthermore, older people in receipt of the pension are able to dress in better clothes than those living in nearby villages where the pension has not been implemented.

There are also indications that universal pensions viewed as entitlements are able to strengthen the social contract between government and its citizens (Hickey 2006). Indeed, it is likely that, in Nepal, the pension contributed to strengthening social cohesion during the recent civil war, as it was one of the few national programmes that continued to be delivered in territories held by the insurgents. And, universal pensions may well provide an economic stimulus to local markets, by increasing consumption among the elderly. In Namibia, most of the available cash in many villages is from the pension, thereby enabling shops to survive (Devereux 2001).

A SENIOR CITIZENS’ GRANT FOR ALL UGANDANS

In October 2011, the government – with the support of the United Kingdom, Ireland and UNICEF – began a pilot Senior Citizens Grant (SCG) to test the feasibility of a universal pension in Uganda. The pension is universal, meaning that it is available for all citizens aged 65 and above in the targeted districts, rather than only the poorest. This follows the model used successfully in many developed and middle-income countries. The SCG provides a monthly benefit of UGX23,000 to everyone over 65 years – or over-60s in Karamoja due to the lower life expectancy in the region – and current plans are for it to reach 47,500 recipients in 14 Districts by 2015.

On the day of the launch of the SCG, His Excellency President **Yoweri Museveni** stated:

¹⁷ Knox (2009).

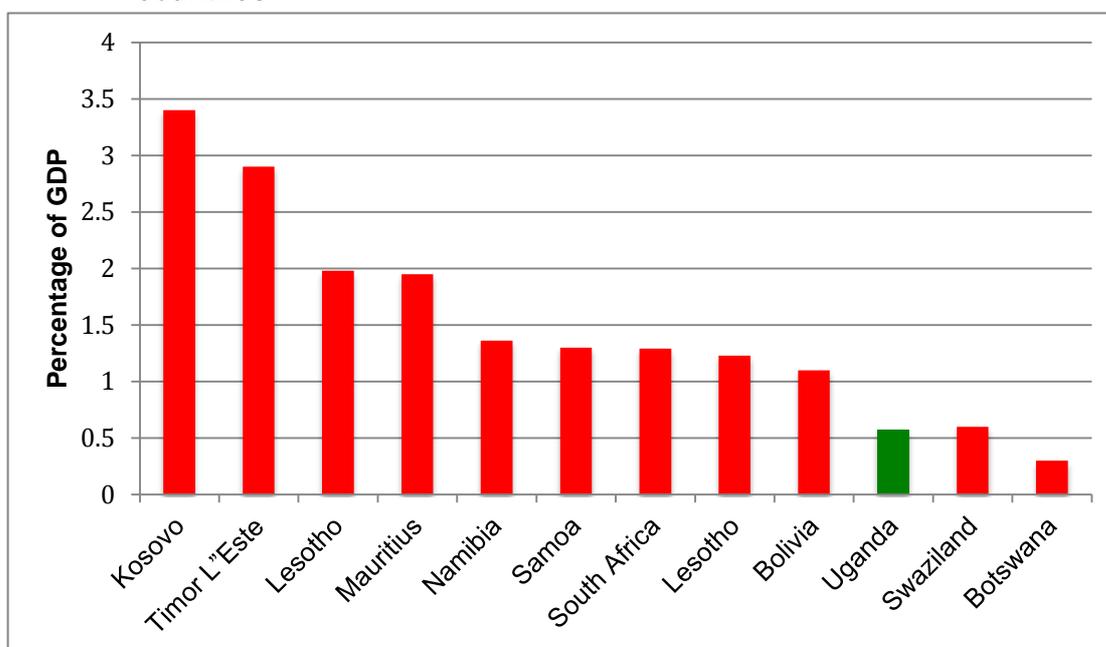
¹⁸ See Sagner and Mtuti (1999) for a description of how pensions enable older people to gain more self-respect in South Africa.

¹⁹ Kidd, S.D. (2011)

“As our economy grows, I am convinced that the expansion of the current pilot scheme beyond the 14 districts will be within our means. It will be by such investments that this Government will achieve its objective of national social and economic transformation.”

Extending the SCG to every Ugandan Citizen over-65 would cost around 0.57% of GDP or 2.7% of the 2010/11 government budget. This compares to 10% of the budget spent on the health sector and 15% on education. While significant, it is a relatively small budget commitment when compared to other developing countries with similar pension schemes. Figure 2 indicates that the Uganda SCG would be one of the cheapest universal pensions in the world, when measured against the size of the economy.

Figure 2: Cost of SCG in Uganda, compared to universal pensions in developing countries



If the SCG were implemented nationally, it would have significant impacts on poverty. It is estimated that **the poverty gap among households with over-65s would reduce by 79%**, a significant achievement which would benefit around 15% of households nationally. Furthermore, **the national poverty gap would be reduced by 17%**. It is likely that the range of benefits experienced in other countries would also be seen in Uganda. This includes in particular, improved nutrition amongst all household members as well as increased use of health and education services, thus strengthening the impacts of existing government investments in service delivery. We would expect many of the most vulnerable children to be significant beneficiaries. Already, the SCG is improving the lives of the first beneficiaries, as indicated in Box 3.

Box 3: Experiences of beneficiaries of the SCG

Tereza is 70 years and a widow. She cares for two grandchildren and, although she has sons and relatives, they do not help her. She has been ill for a long time and suffers from chronic headaches as the result of a brain tumour. When she received the SCG, she first used it to hire people to dig a piece of her garden so that she could increase her food production. She also bought school materials for her grandchildren and paid for their lunches. She plans to use her future grants to access medical treatment and buy sugar and meat. She says: *“I am blessed to have been identified as a beneficiary.”*

Muwukya is 73 years and is married to Peruth who is 66. Muwukya used the first grant to buy banana suckers and the second to pay off a debt that he owed on his grandchildren’s school meals. He then fenced his garden and, was planning to buy a piglet for breeding with his next grant. Peruth used the first grant to dig a piece of land and plant beans and the next two grants to seek medical treatment. Nathan says: *“I thank the government for remembering us in our old age. We are a tired and sick generation with many dependents. The grant will enable us to increase productivity and be important citizens in society.”*

BUILDING AN ENTITLEMENT FOR ALL CITIZENS

The SCG has been carefully designed to ensure that all citizens can benefit, rather than targeting it only at the poor. This means that those who finance the pension – the main taxpayers – are not discriminated against, which is important for generating broad-based support for the scheme. In contrast, Direct Income Support schemes targeted at the poor often generate conflict and jealousies in communities, as some are chosen while others are excluded despite everyone feeling they are poor.²⁰

Indeed, one important reason for ensuring that everyone receives the pension is that, internationally, there is no evidence that it is possible to accurately target only the poor. In low-income countries that target pensions at the poor, errors are very high. In Bangladesh, for example, it is likely that as many as 90% of eligible elderly miss out on the pension.²¹ Even in countries with relatively strong administrative systems, poor people miss out. In Chile, 60% of pension beneficiaries do not belong to the poorest quintile of households, despite the scheme targeting the poorest 15%,²² while, in Costa Rica, 32% of older people in extreme poverty have no access to the state pension, although it is meant for them.²³ Even in South Africa, where administrative systems are strong, pension coverage is high and the government tries only to exclude the rich, 13% of eligible older people still miss out.²⁴ Indeed, a recent study has demonstrated that even the most sophisticated targeting mechanism used in developing

²⁰ Kidd and Wylde (2011) and Kidd et al. (2011).

²¹ Based on analysis of results presented by Barrientos and Holmes (2007).

²² Valdes-Prieto (2002: 45), in Willmore (2006).

²³ Duran (2002:210), in Willmore (2006)

²⁴ Samson et al. (2007).

countries – known as the proxy means test – excludes at least 50% of eligible beneficiaries when coverage is around 20% of the population or less.²⁵

In countries where administrative systems are relatively weak, it is important to implement Direct Income Support schemes that have simple designs. This reduces fiduciary risk, and means that governments are not beset by continuous bad news stories of corruption in the media. A universal pension is the simplest form of Direct Income Support scheme to design and deliver, which is why it is so common in many countries.

A further advantage of universal pensions is that they do not create perverse incentives by discouraging people from working. Older people are not punished if they work by having their benefits withdrawn, which is good for them and their families while benefitting the economy. In contrast, programmes targeted at the poor encourage people to remain poor since, once they are better-off, they may lose their benefit. Alternatively, people may lie about their incomes, which was one reason why Mauritius made its pension universal, in response to complaints from those who were honest.²⁶ A universal pension also does not punish people who are able and wise enough to save for old age, for example through a contributory pension scheme.

The World Bank (1994) – in its classic treatise on pensions *Averting the Old Age Crisis* – summarizes the arguments in favour of a universal pension:

Administratively, [a universal pension] is the simplest structure, with the lowest transaction costs, for the public pillar - an important advantage in developing countries with limited institutional capacities and incomplete record-keeping systems. It avoids the disincentive to work and save inherent in means-tested plans. Its universal coverage helps ensure that the poverty reduction objectives are met, [and] provides a basic income for all old people.

CONCLUSION

Extending the universal pension to every older person in Uganda is – as His Excellency President Museveni suggests – a viable option, in particular if the economy continues to grow. It would also be a popular option, as indicated by the success of similar pensions in other countries, bringing political rewards to the politicians who introduce them. For example the introduction of the universal pension in Lesotho has contributed to the government winning two elections, while the promise of a universal pension was a key factor explaining President Humala's 2011 election in Peru, with his proposal having the support of 73% of voters.²⁷ In Mauritius, an attempt by the government to remove the universality of the pension contributed to it losing the election in 2005.²⁸

²⁵ Kidd and Wylde (2011).

²⁶ Willmore (2006).

²⁷ Sources: RHVP (2008) and <http://www.helpage.org/newsroom/latest-news/peruvians-elect-new-president-on-pension-promise/>

²⁸ Willmore (2006).

Universal pensions are also popular in communities since almost everyone has a relative as a beneficiary, while aspiring to the pension themselves when they reach the age of eligibility. In the Katete pilot pension scheme in Zambia, it is evident that all ages support the pension: if it is not paid on time, it is young people who demand payment for their elder relatives from the local administration.²⁹

By establishing comprehensive pension systems providing income security to all older people, poor countries signal their intent to move to middle-income status. As the Ministry of Finance of New Zealand stated in 2003: “the ability to retire in a degree of personal comfort, without worry and with dignity, is the least that citizens can expect in a modern developed economy.”³⁰ However, he went on to say that this is also the most that the state can do. With a similar intention, the SCG is intended to be a minimum guarantee for all of Uganda’s citizens. It does not replace but complements other means by which people can provide for themselves in old age. Its expansion to all citizens would be a strong signal that the state has assumed its role of supporting the most vulnerable, in line with Uganda’s commitments to other universal entitlements such as primary education.

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²⁹ Kidd, S.D. (2011).

³⁰ Willmore (2006).

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