

Programme of activities and budget for 2020-2022

Report submitted to the Council
by the Bureau

Introduction

This document contains the programme and budget proposals for the triennium 2020-2022. It consists of four chapters:

- Chapter 1: An overview of the ISSA and its strategic framework
- Chapter 2: ISSA institutional development and outlook to 2020-2022
- Chapter 3: The proposals for the programme of activities for 2020-2022
- Chapter 4: The proposals for the budget necessary to finance the proposed programme of activities

This document also includes a number of annexes designed to provide additional and more in-depth information to Council members:

- Annex 1: Detailed estimated expenditures for each project and activity
- Annex 2: Detailed overview of estimated income
- Annex 3: A comparison of key budgetary data between the triennia 2011-2013, 2014-2016, 2017-2019 and the projections for the triennium 2020-2022
- Annex 4: Office space for the ISSA General Secretariat
- Annex 5: List of Technical Commissions proposed for 2020-2022

The proposals have been developed in line with the results-based programming and budgeting methodology adopted by the ISSA Bureau during the 2008-2010 triennium. The level of budgetary detail provided responds to the suggestions made by a working group of the Bureau during the same triennium.

The programme and budget proposals are transmitted to the ISSA Council by the ISSA Bureau based on its consultation of proposals presented by the ISSA Treasurer and the ISSA Secretary General at its 117th and 118th meetings in 2018 and 2019.

The ISSA Council is requested to adopt the Programme and Budget of the Association for the triennium 2020-2022 at its 38th Session on 18 October 2019 in Brussels, Belgium.

Chapter 1: The ISSA – the global community committed to excellence in social security

The International Social Security Association

Access to social security is a human right and social security is essential for individuals, societies and economic advancement. The United Nations Sustainable Development Goals for 2030 have reconfirmed this important role. Excellence in social security administration is a condition for the successful implementation of the right to social security and the achievement of global objectives. Social security coverage and protection cannot be reached without well-governed, performing and trusted social security administrations.

The International Social Security Association (ISSA) is the global organization bringing together social security institutions and government departments. It was founded in 1927 with the historic mandate “to co-operate in the promotion and development of social security, primarily through its technical and administrative improvement, in order to advance the social and economic conditions of the population on the basis of social justice” (*Article 2 of the ISSA Constitution*).

Pursuing its mandate, the ISSA is the recognized authoritative body to issue professional standards in social security administration and provides its member institutions with knowledge, services and access to networks that effectively support them in tackling, and identifying innovative solutions to, priority challenges. The ISSA promotes social security and the important role of social security administration at the international level, and makes a key contribution to the development of well-governed social security systems for all.

Co-operating in addressing priority challenges for social security

Important progress in social security development can be observed in recent years in many regions of the world and social security is now recognized globally as an important investment rather than a cost.

However, a large part of the world population is still not covered by social security protection and the ISSA has identified a number of global challenges facing social security systems.

Demographic changes, the emerging digital economy, labour market developments, increasing migration, technological innovations, unmet chronic and long-term care needs as well as increasing public expectations constitute some of these challenges that must be addressed.

In this context, and more than ever, strengthened political commitment and excellence in social security administration are indispensable conditions for extending, sustaining and developing social security.

To shape the future of social security in an environment of accelerating change, social security institutions are required to not only continuously improve but also to innovate and identify new solutions. Faced with administrative, organizational and technological challenges as well as resource constraints, working towards excellence requires continuous learning, improvement and a commitment to innovation.

In the absence of comparable institutions at the national level, looking abroad is an essential means for social security institutions to identify innovations, learn about good practices and exchange experiences. Social security institutions have therefore formed the ISSA as their global community to facilitate effective co-operation in meeting common challenges towards better social security protection.

The ISSA's strategic framework

The Association is guided by the strategic vision to:

“Promote dynamic social security through supporting excellence in social security administration”

Dynamic social security refers to social security systems that are accessible to all, innovative, sustainable, provide adequate benefits, invest in prevention and early intervention and make a positive contribution to social and economic development.

ISSA member institutions are committed to work towards excellence in social security administration and are supported by the ISSA through appropriate knowledge and services.

The expected outcome of the Association is therefore to achieve:

“Excellence in social security administration as a basis for social security systems that are accessible, innovative, sustainable, provide adequate benefits, invest in prevention and early intervention and make a positive contribution to social and economic development.”

The ISSA's strategic objectives

The ISSA is a knowledge-based service organization that aims to provide each of its member institutions with relevant and quality products and services that effectively support their commitment to excellence in social security administration. The ISSA therefore implements a triennial programme of activities that aims to pursue the following **four strategic objectives**:

1. *Provide relevant knowledge to member institutions, in particular through the establishment of professional standards in social security administration, and practical services that support and recognize the efficient application of this knowledge;*
2. *Offer relevant networks and international platforms for members to exchange;*
3. *Promote dynamic social security at the international level;*
4. *Ensure high levels of service to each member institution, efficient programme delivery and good governance of the Association.*

In pursuing the ISSA strategic objectives and in delivering quality services to ISSA member institutions, the ISSA General Secretariat is committed to the values of empathy, integrity, open-to-change and service quality. To ensure accountability, transparency and good governance, the ISSA General Secretariat ensures full compliance with the ISSA Constitution,

the Good Governance Charter, the Financial Regulations and standards and is committed to continue its existing ISO 9001 quality standards certification.

The ISSA provides services to social security administrations irrespective of the type of benefit or branch covered, and offers both general and specific services for contributory and non-contributory, pensions, health care, unemployment, family allowances, work injury, prevention and related schemes.

The ISSA works in partnership with other international organizations active in the field of social security. The Association is in particular committed to implementing the Memorandum of Understanding with the International Labour Organization (ILO) on collaboration in the area of social security signed in March 2012, and to seeking closer collaboration in further areas such as prevention, migration, the future of work, gender, employment and rehabilitation to the benefit of both ISSA members and ILO constituents. The ISSA supports the objectives of the ILO and is committed to promoting the body of ILO legal instruments, in particular in the field of social security.

Chapter 2: ISSA institutional development and outlook to 2020-2022

Based on the development of the ISSA Guidelines during the triennium 2011-2013, the implementation of the ISSA Centre for Excellence during the triennium 2014-2016 and efforts to facilitate access of all members to the ISSA resources during the triennium 2017-2019, the ISSA has made important steps towards a knowledge-based service organization. A number of member surveys have confirmed broad support for these developments.

In order to further strengthen its value for the global membership and respond effectively to evolving member priorities and needs in a rapidly changing world, the ISSA must embark on the next stage of its institutional development. To support this development, three priority areas have been defined for the triennium 2020-2022.

1. Strengthen responsiveness and impact of the ISSA

Delivering high value to members and ensuring the impact of the ISSA knowledge services is the basis for the successful development of the Association. Informed by member priorities expressed in the member survey as well as the results of activity evaluations, the focus of measures to strengthen responsiveness and impact will first be on better responding to the diversity of the global membership through more flexible approaches, provision of demand-driven services, and practical knowledge. A second objective will be to broaden the accessibility of the ISSA network and knowledge for the staff of member institutions.

Responding more effectively to the priorities of different member institutions requires increased efforts to better understand these needs as well as a product and service portfolio that allows for quick responses, increased tailoring of activities and focus on practical solutions. Key parts of this development will consist of the establishment of a series of new web-based events, the segmentation and diversification of ISSA's Technical Seminar format according to the priorities of different groups of members, the strengthening of demand-driven capacity-building and improved technical support based on expert networks and technical communities.

Broadening and facilitating the accessibility of ISSA knowledge, services and networks to reach more staff in the key business areas of member institutions is another important dimension of efforts to enhance the overall impact of the ISSA. Recognizing the limited capacity for physical meetings, the measures will consist of further investment into member-only services provided on the ISSA web site, the establishment of virtual communities of practice for professionals and specialists from the key business areas of social security administration as well as virtual exchanges and web-based events. Enhanced communication in collaboration with the internal communication staff of member institutions will also support this objective.

2. Sharpen the focus on key current priorities and future challenges

Based on the input of its global membership, the ISSA had in 2016 defined ten global challenges for social security. This approach was implemented throughout the triennium through four regional reports and a concluding global report published on the occasion of the World Social Security Forum 2019.

The work on the ten challenges and the evolving views of members that were expressed in the member survey 2018 demonstrated the importance of complementing ISSA's services offer on Guidelines and good practices with a strong focus on exchange opportunities, studies, expert input and knowledge as regards the responses of social security institutions to emerging and future challenges. Ensuring a strong focus on the future of social security administration and management and connecting social, labour market and demographic developments included in the ten global challenges, the ISSA will focus on four topical priorities.

These four topical priorities will constitute strategic input to the important work of Technical Commissions and regional structures. To further inspire activities and discussions, the ISSA will also strengthen its work with important academics and research bodies. The four topical priorities are:

- ***The future of social security administration and management***

In a context of rapid technological change and increasing public expectations, social security institutions are confronted with significant management transformations and challenges. As part of this priority, the ISSA will focus in particular on examining how various institutions can meet the challenge of managing people and technological innovation to respond to ever increasing expectations for quality service delivery. Key enablers will include a service-oriented, innovative and learning workforce, information and communication technologies that meet the business needs and the leadership and governance that guide the various areas of the organisation in the achievement of its mandate. A new focus will be given to the coordination of services over life's transitions.

- ***Meeting the evolving needs of an ageing population***

Demographic ageing is a global phenomenon and its impacts on social security are felt around the world. Complementing the question of financial sustainability and adequacy of cash benefits, this priority will address the rapidly evolving needs of ageing populations for health and long-term care services. These developments require social security institutions to develop responses including the better coordination among institutions, jurisdictions and service providers, a strengthened role of prevention and health promotion, rehabilitation, ageing in place strategies as well as the innovative use of technologies.

- ***Social security coverage in a changing world***

The extension of coverage is a global commitment and a key priority for social security institutions. Important progress has been achieved towards the goal of universal coverage by 2030 but further work is needed. In this regard, the focus will first be on how access to social security can be further facilitated and promoted, and second on how contributory and non-contributory approaches can be better coordinated and implemented. In a context of labour market transformation driven by digitalisation, increasing cross-border work and other trends, the protection of current levels of coverage as well as the identification of innovative solutions to covering the self-employed, migrant workers as well as people in new types of work will also be addressed.

- ***The role of social security in promoting inclusive growth and social cohesion***

Social security contributes significantly to social cohesion and inclusive growth, however, widening inequalities are challenging progress in this regard. Responses to this development include a reflection by social security institutions on how their programmes and practices can prevent or reduce existing and emerging inequalities. A particular focus will be on how social security can address gender inequalities. In addition, the digital divide, accessibility for persons with disabilities, and unequal life expectancies will be issues to be tackled.

3. Broadening the reach and financing base of the ISSA

A number of member surveys have demonstrated the value of ISSA's knowledge and services to ISSA members. However, as confirmed during recent years, the ISSA products and activities can also have a significant impact on other stakeholders that, while not being eligible for ISSA membership, contribute to the development of national social security systems.

This context and the deliberation of the Bureau on additional financing sources for the ISSA provide the opportunity to strengthen the reach, impact and financial situation of the ISSA through opening access to selected ISSA products to other stakeholders, subject to the ISSA rules and regulations as well as clear conditions and fees to be defined. In that respect, the recommendations of the Bureau Committee on Member Contributions will be further analysed and tested.

Additional efforts to diversify the income sources of the ISSA will also be made in line with the other recommendations of the ISSA Bureau Committee adopted by the Bureau in 2018. In this regard, the specific management and funding parameters for projects involving non-members will be ensured.

Chapter 3: The proposals for the programme of activities for 2020-2022

Each proposed programme activity is presented in line with the results-based programming and budgeting methodology adopted by the ISSA. This presentation includes:

- The title of the activity;
- A short description of the content of the activity;
- The expected outputs of the activity.

The Secretary General provides a report on the implementation of the planned programme at each meeting of the ISSA Bureau and will also submit a medium-term report on programme implementation to the ISSA Bureau during 2021.

In order to measure the performance of the ISSA as an organization, all member institutions will be surveyed in 2021 to rate the quality and impact/potential impact of the ISSA's products and services.

1. Centre for Excellence

The ISSA Centre for Excellence provides member institutions with access to practical knowledge and services that effectively assist them in meeting key challenges in working towards excellence.

The priority topical areas of the ISSA Centre for Excellence correspond to the topics covered by the ISSA Guidelines as outlined in Box 1. The main activities that form part of the Centre for Excellence are the following (described in detail below):

- *ISSA Guidelines and Guidelines knowledge-base* that implement the ISSA's role as authoritative body to issue professional standards for social security administration, and reflect and illustrate international best practice in a technical area;
- *ISSA Centre for Excellence services* that provide support, exchange, learning and capacity-building activities as well as recognition opportunities in the technical areas covered by the ISSA Guidelines.

Box 1: *ISSA Guidelines and topical areas for the service offer of the ISSA Centre for Excellence*

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| <ul style="list-style-type: none"> • Good Governance • Service Quality • Administrative solutions for extending coverage • Communication by Social Security Administrations • Contribution Collection and Compliance • Error, Evasion and Fraud in Social Security Systems • Information and Communication Technology • Actuarial Work for Social Security • Investment of Social Security Funds • Promoting Sustainable Employment • Return-to-Work and Re-integration • Workplace Health Promotion • Prevention of Occupational Risks |
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1.1 Guidelines and Guidelines knowledge base

1.1.1 ISSA Guidelines

The ISSA Guidelines are internationally recognized professional standards in social security administration and offer members access to concise and practical knowledge of international best practice in a specific topical area.

By the end of the triennium 2017-2019, the ISSA will have produced 13 Guidelines in areas rated as priorities by members and listed in Box 1. Available exclusively to member institutions in seven languages, each Guideline consists of principles, structures and mechanisms. ISSA Guidelines are produced and reviewed under the technical authority of the ISSA Technical Commissions according to a standard procedure adopted by the ISSA Bureau. The adherence to the procedure is controlled by the Guidelines Committee of the ISSA Bureau.

This activity provides the resources for the development of new Guidelines as well as the review and extension of existing Guidelines. A review will, in line with the standard procedure, be carried out for the four Guidelines prepared during the 2014-2016 triennium. The activity is implemented by the ISSA General Secretariat in close collaboration with ISSA Technical Commissions and also supports the Guidelines Committee of the ISSA Bureau in the implementation of its mandate.

Expected outputs:

1. Review and update of four Guidelines and specific chapters produced during the triennium 2014-2016 in accordance with the standard procedure approved by the Bureau Committee on Guidelines;
2. New Guidelines on priority topics identified in cooperation with the ISSA Technical Commissions and preparatory work for potential future Guidelines;
3. Three reports to the Bureau Committee on Guidelines.

1.1.2 ISSA Guidelines knowledge base

This activity provides ISSA members with relevant complementary knowledge around the ISSA Guidelines, and in particular with case studies, good practices, and practical illustrations.

This activity ensures the development of the necessary knowledge base for the existing ISSA Guidelines, consisting mainly of Guidelines references and illustrations of good practice as well as of knowledge tools that are the basis for Guidelines-related services.

The Guidelines follow a standard structure consisting of the Guidelines principle as well as mechanisms and structures that institutions can consider to implement this principle. Complementing the Guidelines by case studies, concrete experiences and good practices that illustrate how one or several Guidelines principles have been realized by social security administrations in practice is valuable and relevant knowledge.

This activity therefore structures, collects and regularly updates this knowledge complementing the ISSA Guidelines based on several internal and external sources including the ISSA Technical Commissions and the ISSA Good Practice Database. This activity will also organize the Good Practice Award Competitions on the occasion of each Regional Social Security Forum, and seek more on-going Good Practice entries. New tools to support members in accessing and using the Guidelines and the related knowledge base will be developed,

including an interactive self-assessment mechanism and the connection with the administrative data in the ISSA's country profiles.

This activity also ensures the development of the appropriate knowledge tools for the services provided through the Centre for Excellence and that are based on the content of the ISSA Guidelines. This includes in particular the standard course content for the Guidelines diploma training programmes and the development of the assessment manuals for ISSA recognition.

Expected outputs:

1. Relevant and regularly updated references, good practices and illustrations for each set of ISSA Guidelines and coherent access to Guidelines-related knowledge;
2. ISSA Database of Good Practices in Social Security Administration and enhanced access to, and classification of, the Good Practices;
3. Organization of ISSA Good Practice Award Competitions on the occasion of each Regional Social Security Forum;
4. Development and updating of the knowledge tools for the Centre for Excellence services, including the standard course content for the training programme of the ISSA Academy and the assessment criteria for the ISSA recognition programme;
5. Knowledge environment enabling members to carry out solution-oriented searches of ISSA Guidelines and related knowledge as well as self-assessments for selected Guidelines of their interest based on the evidence and criteria established in the recognition programme.

1.2 Centre for Excellence services

1.2.1 ISSA Technical Advice and Support

This service offers member institutions access to technical advice and support in their work towards administrative improvements, including through the ISSA General Secretariat, member-to-member knowledge exchange and support as well as external expertise.

Responding to requests for technical advice and support from member institutions is an important service function of the ISSA and is governed by a Service Charter outlining the scope and limits of the services provided. One important objective will be to better develop the ISSA's capacity to efficiently facilitate access to relevant experiences and innovations of other member institutions as well as to external expertise. An improved knowledge base of member experiences as well as enhanced expert networks and technical communities will considerably facilitate this objective. In addition, this activity will focus on better enabling twinning initiatives between members for institutions that require more substantial support. It is implemented by the ISSA General Secretariat in collaboration with Technical Commissions and external experts.

Expected output:

1. Technical advice and support to ISSA member institutions, including responses to technical information requests, organization of study visits, access to experiences of other member institutions and facilitation of member-to-member support and matching.

1.2.2 ISSA Academy

The ISSA Academy offers members access to concrete problem-solving, learning and exchange platforms (ISSA workshops) as well as capacity-building and human resource development opportunities.

ISSA Academy workshops, which are offered to between 20 and 25 participants and focus on one topical area covered by one or several ISSA Guidelines, allow for addressing specific challenges and needs of each member institution represented and are led by ISSA accredited experts. The programme of ISSA workshops is developed based on the priorities expressed by member institutions in the global member survey or through the Steering Committees of ISSA regional structures. All workshops are evaluated to refine and adapt the methodology in order to optimally meet member needs.

The ISSA Diploma training programme aims to support member institutions in enhancing staff skills, developing human resources and building future management capacities through access to quality training on international professional standards in social security administration. Delivered through the ISSA Training Consortium, a select group of specialized training institutions in different regions accredited by the ISSA, training courses on ISSA Guidelines feature a standardized content developed by the ISSA and cater to the geographic and language diversity of ISSA members. The programme of training courses is developed by the members of the ISSA Training Consortium and participation in a course is on a cost recovery basis.

A number of member institutions have expressed their interest in bringing expertise to their countries and thereby to benefitting a larger number of staff in a cost-effective manner. To respond to this interest, the ISSA will provide the option for member institutions to request capacity-building activities tailored to their specific needs against a fee covering the costs.

As a new element, the feasibility of an ISSA Master Programme on social security administration combining various ISSA Guidelines and related knowledge, and implemented in collaboration with one or several recognized universities will be analyzed. Depending on the results of this analysis, the development and implementation of this programme may offer member institutions an additional opportunity for human resources development, strengthen the reputation of the ISSA and create a potential source of additional income for the Association.

The ISSA Academy is implemented by the ISSA General Secretariat in collaboration with external experts and professional training institutions.

Expected outputs:

1. A programme of ISSA Academy workshops in various regions and languages according to the expressed needs and priorities of member institutions;
2. A programme of ISSA Diploma training courses on ISSA Guidelines offered through an ISSA training consortium;
3. The organization of customized capacity-building activities upon request by member institutions and on a cost-recovery basis;
4. A feasibility study on the establishment of an ISSA Master Programme on social security administration as well as development and implementation of the Programme depending on the results of the study.

1.2.3 ISSA recognition

The ISSA recognition programme offers member institutions the opportunity to obtain ISSA recognition of their compliance with one or more sets of ISSA Guidelines.

ISSA Recognition is a programme that aims to encourage administrative improvements as well as to provide a service that supports the efforts of social security institutions to strengthen their legitimacy vis-à-vis their stakeholders, both internally and externally. The recognition process is based on standardized assessment criteria and the assessment is carried out by independent assessors. While the ISSA budget covers all programme development and implementation costs, member institutions requesting recognition are charged a fee that covers the costs of the external assessment process.

The ISSA recognition programme has been fully launched during the triennium 2017-2019 and will be expanded to the new Guidelines on Error, Evasion and Fraud during the triennium 2020-2022. This includes the production of assessment criteria and guides for member institutions as well as the identification and training of assessors in various languages. In addition, existing assessment manuals will be adapted in line with changes implemented as part of the Guidelines review process, and efforts will be made to promote the programme to increase the awareness among ISSA members. As a development of the existing programme, procedures for re-certification will be developed for those members who have already successfully completed the recognition programme and wish to be re-certified. The programme is implemented by the ISSA General Secretariat in collaboration with external experts.

Expected outputs:

1. An ISSA recognition scheme available to member institutions for each Guideline covered by the recognition programme, and active promotion of the programme to ISSA members;
2. Expansion of the ISSA recognition scheme to new and updated Guidelines;
3. An assessment report for each member institution participating in the ISSA recognition programme.

2. Social security development

Social security development offers members knowledge, and contributes to ISSA platforms and events, regarding innovative solutions, reform initiatives and emerging approaches related to the four priority topics identified for the triennium.

This activity bundles the ISSA activities to generate high quality knowledge as regards the four priority topics identified for the triennium, and thereby builds on the important work carried out on the ten global challenges for social security. While the means of action will differ among the four topics, the activities will generally seek to monitor key parameters impacting on social security systems and institutions, and identify successful and new solutions to strengthen the responsiveness, coverage and positive impact of social security from the viewpoint of social security institutions.

Social security development activities will generally be implemented in collaboration with ISSA Technical Commissions, and will also benefit from increased efforts to strengthen the ISSA's links with communities of practice, research institutions, academics and think tanks. It also provides for the production of the *International Social Security Review* (ISSR), which is

the principal international quarterly peer-reviewed journal in the field of social security and social security administration and will contribute to knowledge generation regarding the topical priorities.

A special focus of this activity will be on the development and implementation of an ISSA's future of social security administration and management initiative. This initiative will analyze emerging trends as well as collect and share innovative solutions that support member institutions to meet evolving public expectations through high-quality service delivery based on the effective combination of new technologies, human resources and leadership.

Supporting member institutions to deal efficiently and effectively with an increasing number of international situations among covered workers and beneficiaries will be another development objective. This includes in particular the administration of bilateral and multilateral agreements that seek to address challenges related to the coverage of workers, the portability of their rights and the integrity of programmes. In collaboration with a working group, the ISSA will develop tools for international data exchange and further develop its data and knowledge on social security agreements.

Box 2: *Four priority topics for 2020-2022*

- The future of social security administration and management
- Meeting the evolving needs of an ageing population
- Social security coverage in a changing world
- The role of social security in promoting inclusive growth and social cohesion

Expected outputs:

1. Studies related to the four priority topics and related publication outputs and technical contributions to ISSA events, in collaboration with ISSA Technical Commissions, external experts and academics;
2. An ISSA initiative on the future of social security administration, including the systematic collection of innovative approaches, related web content and input to the ISSA professional conferences;
3. Facilitation of collaboration between member institutions on key innovations and emerging technologies;
4. Five reports and web content published on the occasion of the ISSA Regional Social Security Forums and the ISSA World Social Security Forum respectively;
5. Up to nine regular issues of the *International Social Security Review* and three special issues framed by the topical priorities of the triennium;
6. Development of standards, tools and templates for international data exchange in the implementation of social security agreements.

3. ISSA Country profiles

ISSA country profiles offer members access to unique information on social security systems in 177 countries, including detailed descriptions of old-age, survivors and invalidity pension, health care and maternity, unemployment insurance, work accident insurance and family allowances systems.

ISSA country profiles constitute a unique data resource for members to compare their own scheme in regional and global contexts, to facilitate their international activities and as a basis

for the negotiation, preparation and implementation of bilateral and multi-lateral social security agreements. The detailed descriptions of social security schemes are complemented by key country indicators, summary tables, information on bilateral agreements as well as a growing body of institutional administrative information. The data is presented in a searchable and easily accessible manner on the ISSA web portal and continuous efforts are undertaken to extend the number of countries covered as well as to integrate new types of schemes. Enhancing the institutional administrative information as well as data on bilateral agreements will be an important development objective during the triennium.

With the termination of the cost-sharing arrangement with the United States Social Security Administration at the end of the triennium 2017-2019, the ISSA is solely responsible for the financing and development of this important data collection activity from 2020. With a view to strengthening the efficiency of data collection and the responsiveness of the data to user needs, a major redesign project for the ISSA country profiles was launched in 2018 and will continue into the triennium 2020-2022. The redesign aims at transforming the country profiles from a publication-oriented layout to a more structured, form-based and integrated approach based on standardized variables and fields, which will enable users to perform comparative analysis and research operations also linked to other databases such as those of the ILO and the Organisation for Economic Co-operation and Development (OECD). In addition, new sponsors for this activity are actively being sought and options to raise income analysed.

Expected outputs:

1. Regularly updated social security country profiles accessible and fully searchable on the ISSA web portal, including scheme descriptions, information on bilateral agreements, on complementary and private pensions, key indicators, summary tables and administrative information;
2. Redesign project to strengthen the value and responsiveness to user needs, active promotion to identify sponsors and sponsorship relation management.

4. ISSA International Conferences and Platforms

4.1 ISSA World Social Security Forum

The ISSA World Social Security Forum offers ISSA members access to the most important global gathering of CEOs and senior social security administrators, social security ministers and policy-makers as well as representatives of international organizations.

The ISSA World Social Security Forum is the most important event in the cycle of ISSA activities and consists of five days of highly relevant presentations and discussions on the key priority global trends and issues in social security policy and administration. Offering unique senior level networking opportunities, plenary and interactive sessions and as well as meetings of the ISSA General Assembly and the ISSA Council, the World Social Security Forum 2022 will be a unique event for all member institutions.

The World Social Security Forum is organized by the General Secretariat in collaboration with the host organization. ISSA Technical Commissions make a key input to the agenda and the technical discussions.

Expected output:

1. World Social Security Forum to take place in the second half of 2022.

4.2 ISSA Regional Social Security Forums

The ISSA Regional Social Security Forums offer members access to the most important regional gatherings of CEOs and senior social security administrators, social security ministers and policy-makers as well as representatives of international organizations.

The Regional Forums not only provide unique opportunities for senior level networking and technical exchange on key regional challenges in social security policy and administration, but also highlight the important role that social security plays for economic and social development in the various regional contexts. Regional Social Security Forums will be held in Africa, the Americas, Europe, and Asia and the Pacific respectively during the triennium. All Forums are organized by the ISSA General Secretariat in collaboration with the host organization and the ISSA regional structures.

Expected outputs:

1. Regional Social Security Forum for Africa to take place in 2020;
2. Regional Social Security Forum for the Americas to take place in 2020;
3. Regional Social Security Forum for Asia and the Pacific to take place in 2021;
4. Regional Social Security Forum for Europe to take place in 2021.

4.3 ISSA International Conferences for Social Security Professionals

As the global pole for knowledge on social security administration, the ISSA offers member institutions access to a number of unique International Conferences for Social Security Professionals.

Featuring high-level technical discussions on the latest developments and innovations, the ISSA conferences for social security professionals provide unique learning, exchange and networking opportunities for the senior management and technical staff of member institutions. By integrating external expertise into the conference programmes, they also allow member representatives to benefit from close exchanges with, for instance, actuarial specialists, representatives of the ICT industry or experts in occupational safety and health. Reflecting the positive feedback received by member institutions as regards the ISSA professional conferences, it is proposed to expand the topical scope covered by these events.

The ISSA international conferences for social security professionals are organized by the General Secretariat in close collaboration with the concerned ISSA Technical Commissions.

Expected outputs:

1. World Congress on Safety and Health at Work, organized jointly with the ILO, to take place in 2020;
2. International Conference on Management and Innovation, to take place in 2020;
3. International Conference on Information and Communication Technology in Social Security, to take place in 2021;
4. International Conference for Social Security Actuaries, Statisticians and Investment specialists, to take place in 2022.

4.4 ISSA Technical Seminars

Responding to the high priority given by members to exchanges of good practices and lessons learnt, the ISSA offers member institutions a broad programme of Technical Seminars that respond flexibly to the diverse needs of the ISSA global membership.

Enabling exchanges between senior managers and professionals of member institutions on priority topics that are supported by the input of international experts and informed by the latest knowledge is an important and highly valued function of the ISSA. The ISSA Technical Seminars consist of a programme of smaller events that flexibly adapt to the specific needs of certain regions, types of member institutions or social security branches. Efforts will be made to increase the responsiveness, enhance the practical value and better adapt the technical content and methodology of the events to the expressed and evolving demands of members. In line with the objective to make the ISSA technical knowledge and exchanges more frequent, responsive and accessible, a new programme of web-based seminars will enable increased impact and flexibility. While Technical Seminars are mostly organized in collaboration with the ISSA regional structures, the role of Technical Commissions will be enhanced significantly.

Expected outputs:

1. 30 Technical Seminars, most of which organized in collaboration with regional structures and with the support of ISSA Technical Commissions;
2. A programme of web-based seminars, including the possibility to organize ad hoc seminars on demand;
3. An international research seminar on the topical priority of inclusive growth and social cohesion.

5. ISSA international promotion of social security

ISSA international promotion of social security develops the ISSA's collaboration with key regional and global organizations and strengthens ISSA's capacity to promote social security on behalf of member institutions.

The promotion of social security at both international and national levels, including through partnerships with international and regional organizations and other stakeholders, is a key objective of the ISSA. Strengthened political commitment and increased recognition of the need for appropriate investment in administrative and implementation capacities are important benefits for members resulting from this ISSA activity, and a condition for the extension and maintenance of social security coverage.

The knowledge, services and events of the ISSA are of important interest to stakeholders. This activity will leverage on this interest to strengthen ISSA's role in international fora and as part of national projects carried out by international and domestic actors. In some cases, this may also lead to the raising of extra budgetary resources for ISSA or member-driven projects. The increased awareness, dissemination and recognition by national and international actors of the unique value of the ISSA Guidelines will be an important objective. A special focus will be on further strengthening the programmatic relations with the ILO in line with the historic Memorandum of Understanding (MoU) of 2012, to implement the MoU with the World Bank, to continue the involvement in the BRICS, SPIAC-B and G20 cooperation mechanisms, and to develop the relations with the African Union (AU), WHO, OECD, the EU, IFAD and other institutions.

Expected outputs:

1. Coordination and development of ISSA partnerships and social security promotion activities with international and regional organizations and other stakeholders to promote the importance of social security, enhance the reputation of the ISSA and define valuable activities for ISSA members;
2. Joint activities with the ILO to support ILO objectives and facilitate the implementation of social security programmes.

6. ISSA communications, publications and web portal

6.1 ISSA communications

ISSA communications offers members information about member benefits and ISSA products and services, and it contributes to promoting social security at the international level.

A strong communication and promotion capacity is indispensable for the ISSA to effectively engage members, ensure knowledge about the ISSA among members and stakeholders and to promote social security at the international level. Upgrading the ISSA communication and promotion capacity has been a major focus during the past years, and important efforts have been invested during the triennium 2017-2019 in the definition and implementation of a member-centric communication strategy.

Member information activities and promotion for ISSA products, services and events continue to be an important task for ISSA communication, including the preparation of promotion material, the coordination of the ISSA corporate image and the production of the *ISSA Annual Review*. In addition, the strategies, capacities and tools developed during the past years to support a member-centric communication approach will be further enhanced. In this regard, the development of more targeted communication approaches in line with the expressed preferences and needs of each user and member organization as well as the effective use of social media will be priority development areas. The establishment of a global network of communication contacts within member institutions will be a major objective that will not only enhance the promotion of ISSA services among the staff of members, facilitate their access to ISSA knowledge services and strengthen ISSA's impact, but also enhance the diffusion of news from members through the global ISSA network.

Expected outputs:

1. Coordination of the ISSA corporate image and the definition and implementation of ISSA communication standards and rules;
2. Communication and promotion activities for ISSA products, events and services;
3. Communication and news to inform the management and staff of member institutions of the products, services and activities of the ISSA General Secretariat, Technical Commissions and regional structures as well as of news from other member institutions;
4. A global network of communication contacts within member institutions and regular provision of adapted information.

6.2 ISSA publications coordination and production

ISSA publications coordination and production ensures the capacity of the ISSA to offer members access to relevant and quality publications.

This activity coordinates the editing, translation, revision, layout and production of ISSA publications, including in particular the ISSA *Annual Review*, technical reports including for international conferences, web articles, print and online versions of the ISSA Guidelines and the ISSA regional and global reports published on the occasion of the ISSA World and Regional Forums.

In line with the decisions of the ISSA publications editorial committee, ISSA publications coordination strengthens the impact of ISSA knowledge by prioritizing short and easily accessible publication outputs focussed on the specific priorities of member institutions.

Expected outputs:

1. Coordination of the editing, translation, revision, layout and timely production of all ISSA publications;
2. Three *Annual Reviews* in seven languages.

6.3 ISSA web portal

The ISSA member-centric web portal is an integrated information platform that provides members with exclusive access to ISSA's knowledge and services and facilitates the building of communities through relevant functionalities.

This activity provides the resources necessary for maintaining and developing the new ISSA web portal launched during the triennium 2017-2019, including access to the on-line environment of the ISSA Centre for Excellence, the ISSA social security country profiles, online networking and communities, as well as ISSA social security development products and activities. The focus being on exclusive and tailored member services and communication through an enhanced MyISSA section, the integration between the ISSA CRM and the My ISSA personalized member-only spaces makes the web portal the primary gateway to ISSA products and services for member institutions.

Further to the progressive launch of the new web portal during 2019, the consolidation of the new site and the addition of further features will be one objective. An important development priority will be to strengthen the impact of the unique network of the ISSA by building the functionalities allowing member to member exchanges and technical communities online. The focus will also be on facilitating exclusive member access to the ISSA knowledge as well as on developing tools that allow for information to be better tailored to member priorities and interests.

Expected outputs:

1. ISSA web portal including a public space and a MyISSA member only space providing exclusive access to ISSA knowledge and services;
2. Coordination of web portal content sourced from various ISSA activities and the integration of different internal platforms;
3. Web user support, in particular for the exclusive member-only MyISSA space;
4. Development of functionalities allowing efficient online member to member exchanges and technical communities.

7. Management, programme coordination, member relations and governance

7.1 General management

General management ensures that the Secretary General is in the position to carry out his functions, and in particular provide leadership to the effective and efficient implementation of the Programme and Budget to the benefit of members.

In line with the ISSA Constitution, the ISSA Secretary General manages the General Secretariat in order to ensure the cost-effective implementation of the ISSA Programme and Budget and the decisions and instructions of the ISSA statutory bodies. The Secretary General leads the strategic development of the ISSA and the development of relations with member institutions, potential members and partners and advises the other ISSA Officers. The Secretary General also assures the overall relevance and quality of the ISSA products and services in line with the ISO quality management system (certification ISO 9001) and is the spokesperson and representative of the ISSA General Secretariat.

Expected outputs:

1. Manage and direct the activities of the Association as a whole and, in particular, the operation of the ISSA General Secretariat (*Article 39* of the ISSA Constitution);
2. Efficient implementation of the Programme and Budget to the satisfaction of ISSA members;
3. Progress reports on programme implementation on the occasion of each meeting of the ISSA Bureau;
4. A medium-term report on programme implementation to the ISSA Bureau in 2021;
5. Strategic development of the ISSA outreach, impact and financing in line with the recommendations of the Bureau and its Member Contributions Committee;
6. An activities report 2020-2022 to the ISSA General Assembly on the occasion of the World Social Security Forum 2022.

7.2 Programme, regional structures and Technical Commission coordination

This activity offers members a responsive, coherent and integrated approach to ISSA programme development and implementation, including in particular the development of the ISSA regional structures and Technical Commissions as well as their integrated work planning.

This coordination activity covers all ISSA delivery structures including the General Secretariat, the Technical Commissions and regional structures. It includes the preparation of work plans for these structures and appropriate tools to follow the implementation of programmed activities. This activity also supports the Secretary General in his reporting on programme implementation to the ISSA Bureau and the ISSA General Assembly and in the preparation of a Programme and Budget 2023-2025, including through the implementation of a member survey in 2021.

The ISSA Technical Commissions listed in Annex 5 carry out the technical oversight of the content of the ISSA Guidelines and support the services of the ISSA Centre for Excellence through expert knowledge and advice. Reviewing the four ISSA Guidelines launched in 2016 as well as the preparatory work for additional Guidelines will be important priorities for Technical Commissions. Technical Commissions also make a key contribution to the ISSA social security development programme through implementing, or participating in,

studies related to the topical priorities for the triennium. This activity also supports the ISSA prevention activities implemented by the ISSA Special Commission for Prevention and its international sections as well as the cross-branch working groups on rehabilitation and on international data exchange.

The 17 ISSA regional structures constitute pillars for member exchanges on practical experiences and innovations at the regional level. Through hosting many of the ISSA Technical Seminars and Academy workshops, they make a paramount contribution to the implementation of the ISSA work programme. In addition to maintaining and further developing the capacities of this unique networking platforms, their contribution to the implementation of the work programme will be strengthened through a better coordination of regional seminar topics with research and innovation activities as well as enhanced cooperation between regional structures and Technical Commissions. Finally, regional structures will play an important role in strengthening relations with members and communication.

Expected outputs:

1. Coordination of the overall programme development and implementation;
2. Implementation of a member survey measuring the performance of the ISSA in providing relevant and quality services as well as the impact of ISSA activities at member level during 2021;
3. Preparation of programme proposals, and support to the Treasurer in the preparation of budget proposals for the triennium 2023-2025; a Programme and Budget 2023-2025 for adoption by the ISSA Council on the occasion of the World Social Security Forum 2022;
4. The maintenance and development of ISSA regional structures and coordination of the establishment of work plans for each of these structures;
5. The establishment and implementation of a work plan for each Technical Commission;
6. Three ISSA Forums of Technical Commissions to take place in 2020, 2021 and 2022 respectively in Geneva, Switzerland.

7.3 Member engagement and relationship management

This activity develops the ISSA member engagement strategy and ensures institutional and programmatic member relations. It implements regular contacts with member institutions, offers guidance regarding their relations with the ISSA, and ensures that the ISSA is responsive to their expressed needs.

The ISSA member engagement strategy developed during the 2017-2019 triennium aims to ensure that all members can fully benefit from their membership, and its implementation is supported by the deployment of the new ISSA customer relationship management (CRM) system. In line with this strategy, ISSA member engagement and relationship management involves both institutional and programmatic aspects to offer an efficient and responsive experience for each member institution.

The management of institutional relations requires close exchanges with members concerning their leadership and representation in the various ISSA statutory bodies and structures, and is the basis for the structured member information included in the ISSA CRM. Programmatic relations and specific member requests are implemented across all programme activities in the Secretariat, but are facilitated through a dedicated contact providing appropriate guidance and information.

This activity is therefore instrumental for the ISSA institutional development objective to strengthen responsiveness and impact through rapid responses, increased tailoring of activities and focus on practical solutions based on a technical understanding of a member's specific social security and management challenges. Specific efforts will be made to engage with member institutions that have not accessed ISSA's services and knowledge or have voiced doubts about the value of ISSA membership. Progress in enhancing member engagement is monitored on an ongoing basis and lessons learnt contribute to the review and further development of the ISSA member engagement strategy.

The activity also coordinates relations with potential members and member recruitment, and is implemented by the ISSA General Secretariat in close collaboration with the ISSA regional structures.

Expected outputs:

1. Management of institutional relations with member institutions;
2. Monitoring of global levels of member engagement and development of the ISSA member engagement strategy;
3. Collection of information on member challenges and needs, and guidance to member institutions regarding their use of ISSA products and services;
4. Member recruitment and retention activities.

7.4 Statutory bodies

This activity ensures members that the ISSA General Secretariat has the appropriate resources to support the activities of the ISSA statutory bodies and ISSA officers and to ensure good governance through the full compliance with applicable ISSA rules and regulations.

Pursuing good governance of the Association, the ISSA General Secretariat supports the activities of the ISSA statutory bodies including the General Assembly, the Council and the Bureau and its committees through the smooth organization of their meetings, and assists the ISSA Officers in carrying out their duties. In view of the work of the Bureau Committee on Member Contributions during the triennium 2017-2019, this activity will also support the meetings of a Finance Committee to be established. A continued focus will be on ensuring that all ISSA rules and regulations including in particular those of the ISSA Constitution and the ISSA Good Governance Charter are respected. Specific attention will be paid to ensuring the timely submission of documents to the statutory bodies.

Expected outputs:

1. Six meetings of the ISSA Bureau;
2. Three meetings of the ISSA Nominations Committee;
3. Four meetings of the ISSA Finance Committee;
4. One meeting of the ISSA Council on the occasion of the World Social Security Forum 2022;
5. One meeting of the ISSA General Assembly on the occasion of the World Social Security Forum 2022;
6. Support to the ISSA Officers in carrying out their duties.

8. Resources and internal services

This activity ensures members that the ISSA General Secretariat has the appropriate resources to ensure administrative and IT support as well as financial governance and quality management (certification ISO 9001).

Resources and internal services provides the administrative support services in the General Secretariat including human resources management and development, information technology applications and support, customer relationship management system, finance and accounting, mail and distribution. It makes a key contribution to the implementation of the quality management system (certification ISO 9001) and risk management. It supports the ISSA Treasurer, the Finance Committee and the Control Commission in carrying out their statutory roles and responsibilities. Efforts to strengthen efficiency will be continued with the objective to reduce general administration costs. Further to the introduction of a new CRM system during the triennium 2017-2019, activities to consolidate and enhance the functionalities of this system are foreseen.

Expected outputs:

1. Maintenance of ISO 9001 certification of the ISSA;
2. Financial and human resource management of the Association;
3. General Services and information technology management and development;
4. Development and maintenance of the ISSA customer relationship management system;
5. Audited yearly accounts and support to the Treasurer in the preparation of financial reporting to the ISSA Bureau;
6. Support to the ISSA Control Commission and the ISSA Finance Committee.

Chapter 4: The proposals for the budget necessary to finance the proposed programme of activities

The following proposals refer to the global budget for the triennium 2020-2022.

Detailed budget proposals for each programmed activity included in Chapter 3 of this document can be seen in **Annex 1**. This Annex includes information on the distribution of staff costs and non-staff costs across different programmes. The expenditures for activities are justified by the expected outputs for which details are provided in Chapter 3 of this document.

Details as regards the estimated global income to finance the estimated expenditures can be seen in **Annex 2**.

Finally, **Annex 3** provides a comparison of key budget figures of the triennium 2020-2022 with those of previous triennia.

Annex 4 outlines the financing of the office space for the ISSA General Secretariat during the triennium 2020-2022.

1. Global expenditures

The detailed estimates of the staff and non-staff budget requirements to achieve the outputs formulated under the various projects and activities represent a total funding requirement of **CHF 32,400,750** over the three years of the triennium.

This compares to a programme expenditures budget of CHF 30,987,600 for 2017-2019, CHF 30,477,070 for the triennium 2014-2016 and CHF 32,257,540 for the triennium 2011-2013.

The proposals for the triennium 2020-2022 take into account the following developments:

- The total number of regular staff in the ISSA General Secretariat is slightly growing from 41.1 to 42.2 to compensate for the end of extra budgetary financing for the ISSA country profiles and the continuation of this work as part of the regular budget. While measures are being taken to reduce the impact of this new charge of CHF 750,000 as well as of the regular annual standard staff cost increase of 1 per cent in line with ILO rules, staff costs will increase compared to the triennium 2017-2019.
- In accordance with the decision of the ILO, the ISSA will be requested to fully compensate the ILO on a pay-as-you-go basis for the costs of after-service health insurance (ASHI) for ILO officials who worked for the ISSA General Secretariat. The new charge for the triennium 2020-2022 will amount to CHF 696,523.
- Non-staff costs will once again decrease substantially from CHF 6,723,780 to CHF 5,944,571 due to further cutbacks, savings and efficiency gains. This represents a reduction in non-staff costs by 27 per cent during the last 10 years.

- New costs related to the office space of the ISSA General Secretariat after the return to the ILO building of CHF 300,000 for the triennium have been integrated into the budget (see Annex 4 for more information on expenditures related to the office space of the ISSA General Secretariat).

It is important to note that without the additional costs arising from after service health insurance, the integration of the work on country profiles into the regular budget as well as new costs related to the office space of the ISSA General Secretariat, the budget of the ISSA would be CHF 30,656,262 and therefore at a lower level than during the triennium 2017-2019.

1.1 Staff costs

The ISSA staff is the most important asset for the successful implementation of the ISSA programme of activities. A critical staffing level is indispensable for implementing the global programme of the ISSA, and in particular the ambition to become a more relevant organization providing responsive, high-value and tailored services to each member institution.

All staff members of the ISSA General Secretariat hold ILO employment contracts. While ISSA standard staff costs therefore follow the development of ILO standard staff costs, they are on average lower due to lower seniority levels of ISSA staff. ISSA staff cost developments and the difference with ILO standard staff costs are closely monitored by the ISSA on an ongoing basis, as staff costs constitute the large majority of total ISSA expenditures.

Staff cost projections for 2020-2022 integrate the regular increase in standard staff costs of 1 per cent per year related to ILO remuneration rules. While this increase had been 2 per cent in previous triennia, recent changes to the remuneration package for ILO officials lead to a slower increase in staff costs.

In addition, a 5.2 per cent reduction in salaries had been decided by the International Civil Service Commission for professional staff in Geneva in 2017 and was implemented by the ILO from June 2018. However, as this salary reduction is challenged in court by UN and ILO staff and for reasons of prudent budget planning, the staff cost reductions resulting from this development have not been taken into account in the projections for the triennium 2020-2022. A court decision on the matter is expected for the second semester of 2019 and a rejection of the claim would reduce total staff costs by CHF 1.1 Million over the coming triennium.

The staff cost projections also integrate the costs related to those staff working on country profiles that have been covered through an extra budgetary contribution that ceases at the end of the 2017-2019 triennium.

Staff costs are therefore projected to be at the level of **CHF 25,459,656** during the 2020-2022 triennium, compared to CHF 24,263,820 during the 2017-2019 triennium, CHF 23,651,940 during the triennium 2014-2016 and CHF 24,091,200 during the triennium 2011-2013.

In line with the decision of the ILO, the ISSA is requested to fully compensate the ILO on a pay-as-you-go basis for the cost of after-service health insurance (ASHI) for ILO officials who worked for the ISSA General Secretariat. These costs had until 2018 been covered by the ILO. The new charge for the triennium 2020-2022 will amount to CHF 696,523 and is considered as an additional staff cost.

1.2 Non-staff costs

The detailed budget proposals in Annex 1 divide non-staff costs in three sub-items:

- *Contractual services*
This includes the projected costs for all services bought by the ISSA from external persons or companies. These may be external experts drafting Guidelines, supporting workshops, conferences or studies, external expert support for certain activities and projects, maintenance and development of the Web Portal, layout and printing of publications, IT software and licenses etc.
- *Translation and interpretation*
This includes the projected costs for translation of publications, statutory body documents and general administrative documents such as correspondence and work plans into the official ISSA working languages. The ISSA Guidelines, ISSA e-news and selected ISSA promotion material as well as static pages of the ISSA Web Portal are also being translated into Chinese, Arabic, and Russian, and the ISSA partially relies on extra-budgetary contributions by member institutions. Costs for interpretation are primarily related to interpretation at the meetings organized by the ISSA in Geneva, in particular the ISSA Bureau and its committees, as well as the ISSA Forums of Technical Commissions. According to the ISSA interpretation policy for ISSA Regional Social Security Forums and ISSA International Conferences, the ISSA will continue to finance certain interpretation costs at these events.
- *Travel/Daily Subsistence Allowance*
This includes the estimated costs for travel and daily subsistence allowance by ISSA staff members as part of the implementation of ISSA's programme of activities. These are principally travel costs related to the travel of the Secretary General to visit member organizations and represent the ISSA at events, to ISSA Academy workshops, the organization of Regional Social Security Forums, International Conferences and Technical Seminars as well as to the activities of the Technical Commissions and regional structures. They also include some provisions for travel related to building partnerships and promoting the ISSA products as well as social security at the international level.

The global non-staff resources proposed for the triennium 2020-2022 are projected to amount to **CHF 5,944,571** which compares to CHF 6,723,780 during the triennium 2017-2019, CHF 6,825,130 during the triennium 2014-2016 and CHF 8,166,340 during the triennium 2011-2013.

In line with the agreement with the ILO regarding the costs of the office space for the ISSA General Secretariat in the ILO building, an additional non-staff cost of CHF 300,000 for office space needs to be taken into account for the triennium 2020-2022.

Table 1 summarizes the planned expenditures and compares them to the triennia 2011-2013 as well as 2014-2016.

Table 1: *Development of nominal programme expenditures, in CHF, in the last ten years*

	Triennium 2011-2013	Triennium 2014-2016	Triennium 2017-2019	Triennium 2020-2022	Percentage Change 2011-2013 to 2020-2022
Total programme expenditures	32,257,540	30,477,070	30,987,600	32,400,750	+0.04%
Total staff costs	24,091,200	23,651,940	24,263,820	25,459,656 plus 696,523 (ASHI)	+5.6%
Total non-staff costs	8,166,340	6,825,130	6,723,780	5,944,571 plus 300,000 (office space)	-27%

2. Global income

To finance its programme of activities, the ISSA relies mainly on contributions from affiliate and associate members. The contributions of affiliate members are calculated by means of a point system that assigns contribution points according to the number of persons insured by the schemes that a member institution administers. The minimum number of contribution points per institution is ten. The contributions of associate members are at a flat rate and amount to 75 per cent of the minimum contribution for affiliate members.

Contribution income predictions have been made with due attention to prudent financial management in view of continued economic and financial uncertainties as well as a trend towards mergers in social security institutions, and take into account the on-going efforts of the ISSA to retain existing members and expand the ISSA membership:

- In view of membership developments, the total number of contribution points resulting from the affiliate membership of the ISSA will be decreased from 6,100 to 6,000 points.
- In view of the stable development in the numbers of associate members in the Association, the number of associate members will be kept at the level of 65.

Since the year 2011, member contributions are not sufficient to finance expenditures.

As can be seen from Table 2, this situation followed the decision of the Bureau in 2010 to reduce the value of the contribution point on an extraordinary basis from CHF 1,568 in 2010 to CHF 1,500, and to maintain it at this level for each year of the 2011-2013 triennium. At the same time, the Bureau decided to compensate the running deficit through transfers from the Working Capital Fund sourced by a surplus from the 2008-2010 triennium, and to reduce expenditures. This decision was based on the pressures that many member institutions faced in the aftermath of the economic and financial crisis of 2008.

In 2013, the ISSA Bureau decided to maintain the extraordinary reduction in the contribution point value for another three years throughout the 2014-2016 triennium, and to continue using the Working Capital Fund to compensate the resulting imbalance between expenditures and member contributions.

The continued extraordinary reduction in member contributions could only be achieved through significant reductions in staff and non-staff cost expenditures. In addition, due to the temporary relocation of the ISSA General Secretariat during the renovation of the ILO building, the ISSA absorbed new annual rental charges of about five per cent of its total budget.

Further savings and efficiency gains in programme implementation as well as continued deficit financing were implemented to respond to the decision of the ISSA Bureau to maintain the extraordinary reduction of the contribution point value for another three years throughout the 2017-2019 triennium.

At the same time, the ISSA Bureau recognized that securing the ISSA products and services would require a different approach during the coming triennium. The Bureau therefore invited the ISSA Council to include a message to the newly elected Bureau in the Programme and Budget 2017-2019.

The ISSA Council, at its 36th Session held in Panama on 18 November 2016 therefore:

- Recognized the efforts of the ISSA to maintain a stable membership contribution for a period of nine years while at the same time enhancing its value through new practical knowledge products and services;
- Drew the attention of the newly elected Bureau to the need to analyse ways to ensure sustainable income levels through member contributions and other sources.

As a consequence, and to implement the request of the ISSA Council, in June 2017 the Bureau had established a Bureau Committee on Member Contributions with the mandate to analyse ISSA's financial situation and budgetary outlook and prepare recommendations to the Bureau for the development of the value of the contribution point of affiliate members. In addition, the Committee was asked to analyse additional options for income generation by the ISSA.

The Committee discussed that only a combination of measures would ensure the financing of ISSA products and services valued by members during the triennium 2020-2022. These measures consist of:

- A continued transfer from the Working Capital Fund for each year of the triennium 2020-2022;
- Additional savings and cost reductions to be achieved by the ISSA General Secretariat, including a 10 per cent reduction in non-staff costs;
- Ending the extraordinary reduction in the contribution point value implemented from 2011 to 2019 and return to the level of 2010.

In addition, the Bureau Committee considered the implementation of an adjustment mechanism that enables the ISSA to secure its products and services during the triennium despite externally

determined regular cost increases. The Committee identified staff cost increases determined by the ILO and the International Civil Service Commission as the key cost increase that in terms of the weight of staff costs in the total budget can undermine the capacity of the ISSA to deliver the agreed programme of activities.

The Committee also recommended to the ISSA Bureau to further analyse a number of options for additional income generation by the ISSA in the longer term. While the Bureau should closely supervise and promote the development of additional income sources including through the establishment of a more permanent Bureau Finance Committee, these options will need to be further analysed and tested before robust income predictions can be made and are therefore at this stage not taken into account for the income predictions for 2020-2022.

Consequently, the value of a contribution point for affiliate members will be CHF 1,568 in 2020, which is the same level as for 2010.

In view of the standard staff cost increases externally determined by the ILO and the International Civil Service Commission, an adjustment to the contribution point value of 0.77 per cent for 2021 and 2022 will guarantee the delivery of the agreed outputs.

The value of the contribution point for affiliate members will therefore be at CHF 1,580 for 2021 and CHF 1,592 for 2022, the flat rate contribution for associate members will be CHF 11,760 in 2020, CHF 11,850 in 2021 and CHF 11,940 in 2022.

Despite these measures, a gap between the yearly budgeted income and expenditures will still exist and will need to be covered through a transfer of CHF 1,350,000 from the Working Capital Fund. In addition, it is proposed to also finance the new costs of office space amounting to CHF 300,000 through a transfer from the Working Capital Fund. The predicted value of the Working Capital Fund at the beginning of the triennium 2020-2022 will allow for these transfers while still securing flexibility resources to be available in case of unforeseen short-term funding shortfalls.

In line with the recommendations of the Member Contributions Committee, the ISSA General Secretariat will aim to secure income from additional sources such as sponsoring for the work on country profiles or a subscription model from stakeholders not eligible for membership. It is also important to recall the pending court decision on salary reductions of UN professional staff in Geneva that will impact significantly on the ISSA budget, and further revisions of salary costs in Geneva.

It is therefore proposed that the budget and income predictions be monitored closely on an ongoing basis by the Finance Committee of the Bureau to be established, and that the adjustments to the contribution point value in 2021 and 2022 would only be implemented if necessary.

Estimates of the contribution income from affiliate and associate members are summarized in Annex 2 and the global estimated income would amount to **CHF 32,400,750**.

Table 2: *Development of contributions to the ISSA for affiliate and associate member institutions in CHF*

	2010	2011-2013	2014-2016	2017-2019	2020	2021	2022
Point value for affiliate members	1,568	1,500	1,500	1,500	1,568	1,580	1,592
Contribution for associate members	11,760	11,250	11,250	11,250	11,760	11,850	11,940

3. Extra budgetary contributions and financing of ISSA meetings and conferences

In addition to the resources outlined in Annex 2, the ISSA also benefits from voluntary contributions from member institutions the monetary value of which is not included in the budget:

- Voluntary contributions by member institutions who agree to host meetings and conferences, regional structures, contribute to activities of Technical Commissions or agree to translate ISSA documents in additional languages;
- Secondments of staff from member institutions to the ISSA General Secretariat.

ISSA member institutions demonstrate a high commitment to the Association through these contributions and the ISSA Officers and the ISSA General Secretariat are grateful to all member institutions who will contribute to the successful implementation of the programme during the triennium 2020-2022.

The Association will further promote secondments and in-kind contributions by member institutions as increasingly important means of ensuring the delivery of ISSA activities.

Finally, the ILO provides valuable in-kind support to the ISSA, and provides office space to the ISSA General Secretariat at a preferential cost.

ANNEX 1: Estimated expenditures for each activity in Swiss Francs (CHF)		Number staff		Total	Contractual	Translation /	Travel / DSA	Total non	Total
Triennium 2020-2022		P+D	GS	staff costs	services	Interpretation		staff costs	costs
Products and Services									
ISSA Guidelines and Guidelines knowledge base	ISSA Guidelines	1.9	0.1	1,363,158	55,000	119,000	22,000	196,000	1,559,158
	ISSA Guidelines Knowledge Base	1.6	0.9	1,522,272	102,000	145,000		247,000	1,769,272
ISSA Centre for Excellence services	ISSA Technical Advice and Support	0.9	0.1	669,858	10,000	4,000		14,000	683,858
	ISSA Academy	1.7	0.5	1,408,050	202,500	9,000	185,000	396,500	1,804,550
	ISSA Recognition	0.6	0.1	461,868	50,000	10,000		60,000	521,868
ISSA Social security development	ISSA Social security development	2.6	1.5	2,490,900	202,411	105,000	95,000	402,411	2,893,311
ISSA Country profiles	ISSA Country profiles	2.4	0.5	1,893,360	290,000	28,500	10,000	328,500	2,221,860
ISSA International conferences and platforms	ISSA World Social Security Forum	0.6	0.3	553,644	152,000	105,000	27,000	284,000	837,644
	ISSA Regional Social Security Forums	1.1	0.6	1,037,958	67,000	54,000	75,600	196,600	1,234,558
	ISSA International conferences for social security professionals	1.0	0.5	922,740	36,400	72,000	89,400	197,800	1,120,540
	ISSA Technical Seminars	0.7	0.4	668,862	92,500	10,000	79,700	182,200	851,062
ISSA International promotion of social security	ISSA International promotion of social security	0.8	0.1	600,528	50,000	5,000	95,000	150,000	750,528
Sub-total		15.9	5.6	13,593,198	1,309,811	666,500	678,700	2,655,011	16,248,209
Communications, publications and web portal	Communications	1.1	0.9	1,175,622	190,000	130,000		320,000	1,495,622
	Publications coordination	0.6	0.6	691,308	115,000	48,000		163,000	854,308
	Web portal	1.5	1.1	1,544,718	145,000	23,000		168,000	1,712,718
Management, coordination, member relations and governance	General management	1.0	0.8	1,060,404	145,000	43,280	202,500	390,780	1,451,184
	Coordination of programme, regional structures and Technical Commissions	1.4	0.6	1,245,948	207,000	100,000	100,000	407,000	1,652,948
	Membership engagement and relationship management	2.2	0.8	1,892,364	40,000	20,000	95,000	155,000	2,047,364
	Statutory bodies	0.3	0.8	575,094	45,000	165,000		210,000	785,094
	Sub-total	8.1	5.6	8,185,458	887,000	529,280	397,500	1,813,780	9,999,238
Resources and internal services	HR, Finance and Logistics	1.0	4.0	2,528,820	250,000	28,500	7,000	285,500	2,814,320
	External accounting, Audit				235,800			235,800	235,800
	Staff Training and Development				200,000			200,000	200,000
	Information technology and office equipment	1.0	1.0	1,152,180	437,480		7,000	444,480	1,596,660
	Other operating costs (paper, mail and transport, telephone, photocopies)				310,000			310,000	310,000
Sub-total		2.0	5.0	3,681,000	1,433,280	28,500	14,000	1,475,780	5,156,780
After-service health insurance - employer contributions				696,523					696,523
Office space for the General Seceratiat					300,000			300,000	300,000
Total expenditures		26.0	16.2	26,156,179	3,930,091	1,224,280	1,090,200	6,244,571	32,400,750

ANNEX 2: Estimated budget income, by source for 2020-2022 in Swiss Francs (CHF)

	2020	2021	2022		Total Triennium
	Point value affiliate member / flat rate contribution associate member			Total of affiliate members' points / Number of associate members	
<u>Contributions:</u>					
Contributions from affiliate members	1,568	1,580	1,592	6,000	28,440,000
Contributions from associate members	11,760	11,850	11,940	65	2,310,750
<u>Other income:</u>					
Transfer from Working Capital Fund	500,000	550,000	600,000		1,650,000
Total income triennium 2020-2022					32,400,750

ANNEX 3: Comparison of key budget data between the triennia 2011-2013, 2014-2016, 2017-2019 and the triennium 2020-2022

Table 1: Expenditure data (in CHF)

	Triennium 2011-2013	Triennium 2014-2016	Triennium 2017-2019	Triennium 2020-2022	2011-2013 compared to 2020-2022
Total expenditures	32,257,540	30,477,070	30,987,600	32,400,750	+0.04%
Total staff expenditures	24,091,200	23,651,940	24,263,820	25,459,656 plus 696,523 (ASHI)	+5.6%
Total non-staff expenditures	8,166,340	6,825,130	6,723,780	5,944,571 plus 300,000 (office space)	-27%

Table 2: Income data (in CHF)

	Triennium 2011-2013	Triennium 2014-2016	Triennium 2017-2019	Triennium 2020-2022
Total income	32,257,540	30,477,070	30,987,600	32,400,750
Total income from affiliate members	28,350,000	27,000,000	27,450,000	28,440,000
Total income from associate members	2,700,000	2,193,750	2,193,750	2,310,750
Transfer from Working Capital Fund	1,207,540	1,283,320	1,343,850	1,650,000

Table 3: Development of contributions to the ISSA for affiliate and associate member institutions (in CHF)

	2010	2011- 2013	2014- 2016	2017- 2019	2020	2021	2022
Point value for affiliate members	1,568	1,500	1,500	1,500	1,568	1,580	1,592
Contribution for associate members	11,760	11,250	11,250	11,250	11,760	11,850	11,940

ANNEX 4: Office space for the ISSA General Secretariat

Background

Since the creation of the International Social Security Association (ISSA) under the auspices of the International Labour Office (ILO) in 1927, and reflecting the close cooperation and relationship of both institutions, the ISSA General Secretariat had been housed in the ILO headquarters at no cost.

As a comprehensive renovation project of the ILO headquarters building has significantly limited the available office space in the building, the ILO had informed the ISSA in May 2011 that it would be unable to provide the ISSA with office space in the ILO headquarters during the renovation period 2014-2019.

The building of the World Meteorological Organization (WMO) was in the second half of 2013 identified by the ILO as the most suitable option for the relocation of the ISSA General Secretariat. The ISSA General Secretariat moved to the WMO building on 3-4 June 2014, where it was joined by the ILO Statistics Department.

The costs for rent and charges during the temporary relocation of the ISSA General Secretariat have amounted to CHF 530,000 per year and have had to be covered fully by the ISSA. In view of the provision of free office space by the ILO since the establishment of the ISSA in 1927 until 2014, no resources for office space had been included in the ISSA budget before the relocation.

A temporary financing solution therefore needed to be found and consisted of savings generated by the General Secretariat and a transfer from the Working Capital Fund.

While the ILO had committed in 2013 to the return of the ISSA General Secretariat to the ILO building after the end of the renovation, it had at the same time also clarified that the conditions for the return would need to be negotiated before the end of the renovation.

Negotiations on the conditions for the return to the ILO building

In view of the progress of the renovation works as scheduled, discussions between the ISSA President and the ILO Director General as regards the return of the ISSA General Secretariat to the ILO headquarters were initiated during the first semester of 2018. The ISSA Bureau was informed of the development of these negotiations at its meetings in August and December 2018 and took note that:

- The ILO Director General had confirmed that the ISSA General Secretariat would return to the ILO building from November 2019. In addition, and in view of the important synergies in the work of the ISSA and the ILO on social protection, the office space required by the ISSA would be made available in close proximity to the offices of the ILO Social Protection Department;
- The ILO Director General had explained that, in view of the high burden of the renovation costs on the ILO budget, the ILO is considering to charge the ISSA for its office space in the ILO building;

- The ILO Director General had confirmed that any payment by the ISSA for its office space would be at a preferential rate.

In response to this report, the ISSA Bureau at its 116th meeting in August 2018 unanimously agreed on a resolution to be brought to the attention of the ILO Director General. This resolution recognized the important financial burden of the renovation costs on the ILO budget but expressed the hope that the ISSA would only be charged a symbolic rent for the office space of its Secretariat.

The negotiations were concluded in 2019 through an agreement between the ISSA President and the ILO Director General. This agreement that is being formalized through a Memorandum of Understanding stipulates that in view of the long-standing relations between the ISSA and the ILO:

- The ISSA General Secretariat will once again be hosted by the ILO in its headquarters from November 2019;
- The ISSA General Secretariat will occupy a total space of approximately 1,280 square meters, which corresponds to one-third of one floor of the ILO building;
- The ISSA will pay the ILO an annual amount of CHF 250,000 for its office space. An important part of this amount covers the charges (electricity, heating, security, cleaning etc.) related to the space occupied by the ISSA General Secretariat;
- The ISSA payment will be phased in over the next triennium according to the following schedule:
 - CHF 50,000 in 2020;
 - CHF 100,000 in 2021;
 - CHF 150,000 in 2022;
 - CHF 250,000 annually from 2023.

Financing of office space during the triennium 2020-2022

The expenditures for the office space of the ISSA General Secretariat for the triennium 2020-2022 will therefore amount to CHF 300,000. This amount has been included in the budget proposals for the triennium and will be financed through a transfer from the ISSA Working Capital Fund.

The options for financing the cost of the office space for the triennium 2023-2025 and beyond will need to be discussed by the ISSA Bureau during the next triennium based on the results of the current triennium, the reserves available and the recommendations by the Finance Committee on the long-term budget planning of the Association.

ANNEX 5: List of proposed Technical Commissions for 2020-2022
ANNEXE 5: Liste des Commissions techniques proposées pour 2020-2022
ANEXO 5: Listado de las Comisiones Técnicas propuestas para 2020-2022
ANHANG 5: Liste vorgeschlagener Fachausschüsse für 2020-2022

Contribution Collection and Compliance
Recouvrement des cotisations et conformité
Recaudación y Cobranza de Cotizaciones
Beitragseinzug und Einhaltung der Bestimmungen

Employment Policies and Unemployment Insurance
Politiques d'emploi et de l'assurance chômage
Políticas de Empleo y el Seguro de Desempleo
Beschäftigungspolitik und Arbeitslosenversicherung

Investment of Social Security Funds
Investissement des fonds de la sécurité sociale
Inversión de los Fondos de la Seguridad Social
Anlage von Vermögenswerten der sozialen Sicherheit

Family Benefits
Prestations familiales
Prestaciones Familiares
Familienleistungen

Statistical, Actuarial and Financial Studies
Etudes statistiques, actuarielles et financières
Estudios Estadísticos, Actuariales y Financieros
Statistische, versicherungsmathematische und finanzielle Studien

Old-age, Invalidity and Survivors' Insurance
Assurance invalidité-vieillesse-décès
Seguro de Vejez, Invalidez y Sobrevivientes
Alters-, Invaliden- und Hinterbliebenenversicherung

Insurance against Employment Accidents and Occupational Diseases
Assurance contre les accidents du travail et les maladies professionnelles
Seguro de Accidentes del Trabajo y Enfermedades Profesionales
Versicherung gegen Arbeitsunfälle und Berufskrankheiten

Mutual Benefit Societies
Mutualité
Mutualidad
Hilfsvereine auf Gegenseitigkeit

Medical Care and Sickness Insurance
Prestations de santé et d'assurance maladie
Prestaciones Médicas y del Seguro de Enfermedad
Gesundheitsleistungen und Krankenversicherung

Prevention
Prévention
Prevención
Prävention

Information and Communication Technology
Technologies de l'information et de la communication
Tecnologías de la Información y de la Comunicación
Informations- und Kommunikationstechnologie

Organization, Management and Innovation
Organisation, Management et Innovation
Organización, Gestión e Innovación
Organisation, Verwaltung und Innovation

Social Security Policy Analysis and Research
Analyse des politiques et recherche en sécurité sociale
Investigación y Análisis de Políticas en Seguridad Social
Forschung und Analyse der Politik der sozialen Sicherheit

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