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## Global Social Protection: Setting the Agenda

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European University Institute
**Robert Schuman Centre for Advanced Studies**
Migration Policy Centre

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## Abstract

In todays' world, more than 220 million people live in a country that is not their own. Many people live transnational lives but the social contract between citizen and state is national. How are people on the move protected and provided for in this new global context? Have institutional sources of social welfare begun to cross borders to meet the needs of transnational individuals? This paper proposes a new Global Social Protection (GSP) research agenda, summarizing what we know and what we need to do moving forward. What protections exist for migrants, how are the organized across borders, who can access them and who gets left out? This working paper defines GSP; introduces the idea of a "resource environment" as a heuristic tool with which to map and analyze variations in GSP over time, through space, and across individuals; and provides empirical examples demonstrating the centrality of GSP for scholars of states, social welfare, development, and migration.

## Keywords

# 1. Introduction

Imagine an undocumented Mexican migrant in Denver, Colorado who has no access to the US health care system who takes her child to the Mexican consulate for the vaccinations she needs so she can enroll her daughter in a US public school. A young German family, struggling to care for elderly grandparents given the retrenchment of state-supported welfare, hires a low-wage Filipino migrant to provide elder care in its home. When that same migrant sends her wages back to the Philippines to support her family, the Filipino government taxes a portion of those remittances to help fund its national health care program. An Indonesian construction worker in Australia cannot access social security benefits or public health services while in Australia although he receives the portion he was required to pay into the system when he returns home. An aging Ethiopian with permanent resident status has been working as a custodian in a US university for twenty years, yet wants to spend his old age with his family in Ethiopia. However, despite paying twenty years worth of social security taxes to the US government, his US social security payments will be stopped if he retires to his native country. Meanwhile, the Ethiopian government struggles to pay for the education of its youth and for elder care, in part because so many of its working-age citizens pay taxes to the government where they are living rather than to Ethiopia. As a result, transnational humanitarian NGOs are increasingly responsible for building Ethiopian schools, training teachers, designing curriculum, and providing free education to many children, sometimes generating these social protections in partnership with the Ethiopian government.

These vignettes reflect just how much we live in a world on the move. More and more, people choose or are pushed into lives that cross national borders—earning livelihoods, raising their political voices, caring for family members, and saving for retirement in more than one nation state. These migrants call many places home—the scattered sites where their dispersed family members live, where they work or study, the places they remember, the homes they long to return to and rebuild. Increasingly, international finance and development organizations look to migrants to drive economic growth, development, and political activism in their homelands. The economic remittances they send fund health, education, and social services that sending country governments often cannot afford and the social remittances—the knowledge, practices, and skills that migrants also import—sometimes transform social and economic life in positive and negative ways (Levitt 2001).

While there is a growing body of scholarship about many aspects of transnational livelihoods, we still know very little about the questions raised by the vignettes above. When and how are people on the move protected and provided for outside the traditional framework of the nation-state? How is the social welfare of the young and the elderly in societies of origin guaranteed when people who would normally provide such services migrate? And what new institutional arrangements—or forms of *global social protection*—are emerging in response to these changing dynamics?

These questions are at the heart of our research agenda we propose in this working paper. National and global systems of social protection have undergone powerful transformations across the last several decades, yet scholars have only recently begun to identify and analyze the consequences of this fundamental reorganization for basic social welfare. We aim to bridge this gap by bring existing theories of welfare states, global social policy, development, and migration into line with increasingly transnational social realities, thus pointing a way forward for future social scientific research. Proposing a road map for the study of GSP is also necessary for scholars because we need to identify new or widening "holes" in existing systems of social protection, who is most likely to fall through them, and how individuals piece together transnational strategies to address them the best they can.

Most importantly, studying GSP is necessary to identify which policies or strategies can most efficiently provide for and protect the wellbeing of individuals in our increasingly transnational world.

In the pages that follow, we briefly discuss some of the relevant theories upon which we build and signal what they miss by not taking transnational factors into account. We then define what we mean by Global Social Protection. Third, we introduce the idea of a "resource environment" as a heuristic tool that helps us map and analyze variations in GSP over time, through space, and across individuals. Fourth, we include some empirical examples to put flesh and bones on our argument. Finally, we develop a list of questions that the scholarly community must answer to understand and improve existing systems of global social protection that we hope will guide future research.

## 2. What Theory has Missed

Mainstream migration scholarship still suffers from methodological nationalism (Wimmer and Glick Schiller 2003). Because U.S. and European research is still overwhelmingly focused on processes of incorporation and assimilation into host countries, it generally ignores how migrants might protect and provide for themselves across borders. When we learn of transnational health or educational schemes, it is primarily from health and education researchers. On the other hand, transnational migration scholarship, which has long taken into account migrants' simultaneous embeddedness in multiple societies, and elucidated aspects of social life that transcend national borders, provides us with an important foundation from which to build (Glick-Schiller and Faist 2009; Levitt 2012; Mazzucato 2010). Research on how families raise children and care for the elderly across borders using formal and informal networks is well underway. Much work has also focused on the rights of domestic workers (Lutz 2008; Parreñas 2005; van Walsum 2011). The role of hometown associations in sending community development is another well-developed research strand of relevant research. There is an emerging body of work on how social identities and stratification are produced transnationally. Roth (2012) and Joseph (2015), for example, describe how racial identities are constructed across borders. Levitt (2001), Glick Schiller and Salazar (2013), Faist (2014), and Boccagni (2014) document similar dynamics for class and inequality. These ongoing, isolated conversations must be brought into a more integrated, expanded dialogue that sees health, education, secure retirement, and social security as increasingly constructed within and beyond the nation-state.

The literature on welfare state regimes as institutions of social protection, most prominently articulated by Gøsta Esping-Andersen, is also an important piece of our puzzle. Esping-Andersen divided European and North-American countries into three types of welfare regimes based on their level of de-commodification (measuring reliance on the market) and de-familization (measuring reliance on the family)—what Esping-Andersen calls the "peculiar public-private sector mix" of each nation (1990). This typology has been used to investigate the scope and patterning of specific social protections provided by states, such as Ann Shola Orloff's work on the state structuring of gendered social protections (1993). By its very nature, however, this research remains closely tied to the nation state as a unit of analysis. It does not consider how a person might piece together a package of protections from more than one nation-state.

Development scholarship, although also concerned about how people are protected and provided for, also tends to maintain the nation-state as the primary unit of analysis. Evans' classic work on developmental and predatory states highlights the fundamental role that states' play in shaping economic opportunities for individuals (Evans 1995). Development scholarship would benefit from using a transnational optic for two reasons. First, developing states looking to capitalize on and serve their growing diasporas are extending their social service provision across national borders (Ragazzi 2014, Delano 2013). As our vignette above demonstrates, the Mexican government often provides health care services to documented and undocumented migrants in the United States. At the same time, it benefits significantly from the individual and collective remittances these migrants send back,

particularly in the context of hometown associations that have become major drivers of local community development.

Second, development scholarship has only recently brought the role of non-state development actors—like humanitarian NGOs—into focus but, here again, the analysis generally stops at the national border (Viterna and Robertson 2015). However, many of these humanitarian NGOs carry out aspects of their activities across borders: their organizational structure (i.e., branch offices in more than one country), their financing (i.e., domestic NGOs often rely on international grants to fund their programing), or their activities (NGOs are often involved in transnational advocacy networks reflecting their specific cause). As we argue below, individuals look increasingly to each of these sources of provision—sending states, receiving states, and third sector actors—in addition to purchasing social provision from the market or requesting it from family and friends, to attempt to cover their resource needs. Understanding development therefore increasingly demands a transnational lens regardless of whether development is measured at the level of the state or the individual.

While we still find the national-level concept of regimes to be useful, we want to move beyond classic, state-based approaches and debates about their classification (Arts and Gelissen 2002; Aspalter 2011; Esping-Andersen 1990) to consider how at least some individuals are embedded in transnational social fields, and how multiple state and non-state actors protect and provide for them. Much of the emerging work on new forms of social protection, while focusing on migrants, still sees individuals as living in discrete nation-state units, although it recognizes that they might be protected and provided for by a combination of sending and receiving state policies (Avato et al. 2010; Holzmann et al. 2005; MacAuslan and Sabates-Wheeler 2011; Wood and Gough 2006).

We build, in particular, on the growing body of "global social policy" literature that has emerged since the 1990s. This research examines how international actors' discourses about and practices around social policy affect national policy. Ostensibly "national" welfare is now understood to be strongly influenced by transnational, global, and sub-national actors (Deacon 2007, Kaasch 2013, Yeates 2006). Recently this scholarship has incorporated the "agency, structure, institutions discourse" (ASID) approach developed by Moulaert and Jessop (2006) and tried to differentiate itself more clearly from world polity and neo-institutional theories that also try to explain the spread and convergence of global norms and policies (Meyer 2000, Boli and Thomas 1999).

We believe a necessary next step is to bring individuals back into this conversation by looking not only at how they might use services available from two discrete nation states but also at how bi-national, transnational, and supranational policies expand their access to care. Our concept of resource environments, introduced below, allows us to look not just at how states extend their protective arm into others' sovereign territory but also at how a range of new and old, formal and informal actors, including markets, third-sector actors, and social networks protect and provide for individuals within and beyond the nation-state. We broaden the range of social services considered, thereby bringing relevant but previously isolated pieces of this conversation into dialogue. Finally, we look beyond the U.S. and European context to see how informal security regimes (Wood and Gough 2006), which are the rule rather than the exception in many developing countries with weaker states throughout Asia, Africa, and Latin America, fill out this picture. In these contexts, where states are often absent or frail, community and family institutions, or the forces of insecurity that disrupt them, are only indirectly bound to the logic of nation states (Gough and Wood 2004).

A transnational social field approach, in which the social field shapes and is shaped by individuals' resource environments, knits these allegedly separate spaces together into a single, sometimes seamless, although sometimes deeply fractured social, political, and emotional imaginary. Categories such as class, inequality, and development can then be revisited and reworked by taking into account not only the ways in which they are constituted across space but the ways in which health, education, and social security are constructed within and beyond national borders and the interactions between

them. Again, the goal of this working paper is to further define, map, and evaluate this broader, more cohesive notion of global social protection.

We take up our task with a keen eye on the current geopolitical moment. Throughout the global north, basic social welfare entitlements are shrinking and are often replaced by an increasingly unregulated, unaffordable market for basic services. More and more people work at insecure, part-time, low-paying jobs that come with few benefits and pay too little to enable people to purchase benefits through the market. Mobility is encouraged (either for schooling, medical care, or work) for educated, high-skilled professional migrants and is often thwarted or even criminalized for the low-skilled, giving rise to two classes of privileged and disadvantaged migrants. Countries of destination often use social protection to regulate migration, the rationale being that if migrants cannot access services, they will return home. By deeming migrants ineligible for certain basic services and rights, states ensure enduring social marginalization (Bommes and Geddes 2000).

On the sending state side, since the 1980s, liberalization and structural adjustment programs (along with small taxpayer bases, poverty, corruption, fragile civil societies, and weak states) have thwarted the development of comprehensive welfare states in much of the global South. While the idea of "social protection" is used in place of "social welfare" or "social policy" in many developing countries, they are not necessarily synonyms (Sabates-Wheeler and Feldman 2011). More and more sending states have instituted policies designed to help migrants provide for their families and communities and to manage remittance transfers more effectively. Migrant earnings substitute for the state—they fund the health, education, and social services the state cannot afford. In this way, social welfare is increasingly framed as the handmaiden to growth rather than vice versa, and migrants are supposed to foot the bill. According to Avato et al. (2006:463), "migration itself is a social protection tool for many people, especially poorer families who are able to use remittances and migration-specific income to ensure basic needs and at times build up some assets."

## 3. Defining Global Social Protection and Resource Environments

The OECD subsumes the following variables under the category "social protections":

| | |
|---|---|
| **Old Age** | Pensions, Cash Benefits, Residential Care/Home help |
| **Survivors** | Pensions, Cash Benefits, Funeral Services |
| **Incapacity** | Disability Pensions, Paid Sick Leave (occupational injury and disease), Cash Benefits, Residential Care/Home Help |
| **Health** | Health Care |
| **Family** | Family Allowances, Maternity and Parental Leave, Early Childhood Education and Care, Cash Benefits |
| **Active Labor Market Programs** | PES, Training, Employment Incentives, Supported Employment and Rehabilitation, Job Creation, Start Up Incentives |
| **Unemployment** | Unemployment Compensation, Severance Pay, Early Retirement |
| **Housing** | Housing Assistance |

To these we add education to capture the growing number of bi-national teacher training, student retention, and reciprocal credentialing schemes.

| | |
|---|---|
| **Education** | Knowledge and skill production, credentialing |

The OECD still measures social protection nationally, despite the fact that it can be obtained from multiple sources that operate transnationally. Moreover, while the OECD emphasizes the role of states in providing social protection, we note three additional sources: social protections can be purchased privately through the *market*, obtained from *third sector actors*, or provided by *individuals' personal networks*. States provide social protections through a number of different institutions, operating at multiple levels of government. Supranational institutions, such as the World Health or Pan American Health Organizations or the European Union may be a source of care as are services and protections provided sub-nationally by regions, provinces, or state-level governance.. Markets provide social protections like private health insurance or contracted child-care to those who can afford them. Third sector organizations include NGOs, church groups, and labor unions that generally provide low-cost protections to a particularly defined group of the population, including health care, employment training, education, housing, and more. And individual social ties include networks of family, friends, neighbors, coworkers and others upon whom an individual can call for a wide variety of support, including housing, childcare, cash transfers, or employment opportunities.

We define *global social protection* as the policies, programs, people, organizations, and institutions that provide for and protect individuals in the above nine areas in a transnational manner. We include grounded actors that provide for and protect people who move transnationally; transnational actors that provide for and protect grounded individuals; and transnational actors that provide for and protect transnational individuals. Migrants in particular move between spaces of varying state capacity, where the scope of formal social protection may be far-reaching or quite limited. They are protected through their access to formal and informal institutions in both sending and receiving countries. For international migrants moving to strong states in the global north, residency status and citizenship strongly influences their entitlements in the host country, which may vary considerably in different sub-national jurisdictions (Avato et al. 2006; Bossert 1998; Holzmann et al. 2005). Individuals without legal status or residency are particularly vulnerable because their access to public institutions of social protection is generally so limited.
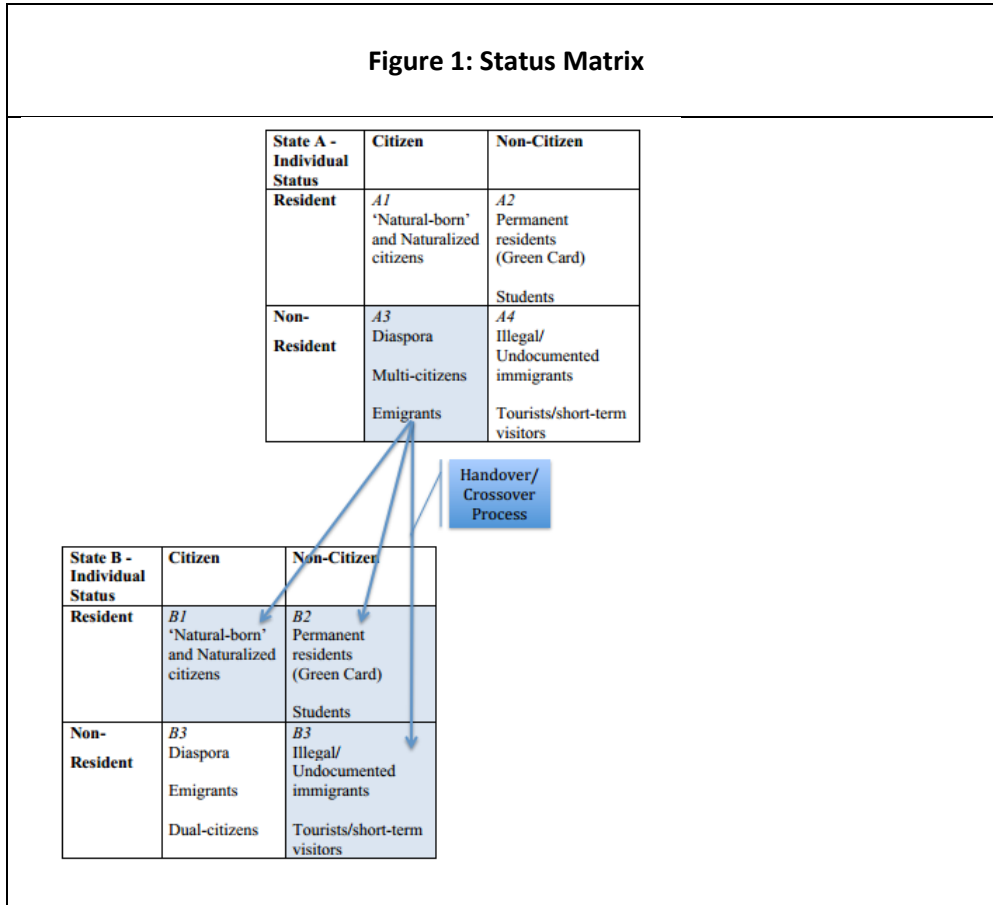
Outside the global north, the national state and the rule of law are less firmly established, and the factors determining access to social protection are different. Documented international migrants who are formally employed in China, for example, are legally obligated to become part of the Chinese social insurance system, but local governments often find ways and means to avoid a full implementation of this law. Where this occurs, some international migrants can rely on market-based alternatives such as commercial health insurance via the employer. Others remain uncovered. Because undocumented immigrants face significant difficulties finding employment they are excluded from most forms of social protection (Haugen 2012).

We suggest that the concept of a "resource environment" can help scholars map, analyze, and understand the rapidly transforming world of global social protections. An individual's resource environment would include all of the possible resources available to him or her from the four potential sources of protection, based on his or her individual characteristics. These individual characteristics include his or her nation of origin, where he or she resides, the breadth and depth of his or her social networks, in addition to gender, race, ethnicity, religion, class, and education.

For migrants, access to formal social protection provided by state and public institutions depends largely on a migrant's legal and residency status in relation to the home and host countries. The status matrix, as illustrated in Figure 1, combines both a migrant's residence status (resident or non-resident) and citizenship status (citizen or non-citizen). In the home country, a migrant will usually have A3 status –diaspora, multi-citizen, or emigrant.[1] In the host country, the migrant can have the status of a naturalized citizen (B1), a permanent resident, green card holder or student (B2), or of an illegal or undocumented migrant (B4). Depending on the nation, access to social protections can be based

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[1]    We thank Chris Lilyblad and Alvaro Lima for their contributions to the ideas developed in this section.

directly on citizenship or residency, or it can be based on contributions. This access is often dependent on participation in the formal labor market that, in turn, relies primarily on the migrant's residence status. Some portion of migrants' resource environments often overlap with the resource environments of their non-migrant family members and friends, especially in cases where non-migrants depend on migrants for basic social support and care.



**Figure 1: Status Matrix**

| State A - Individual Status | Citizen | Non-Citizen |
|---|---|---|
| Resident | *A1*<br>'Natural-born' and Naturalized citizens | *A2*<br>Permanent residents (Green Card)<br><br>Students |
| Non-Resident | *A3*<br>Diaspora<br><br>Multi-citizens<br><br>Emigrants | *A4*<br>Illegal/ Undocumented immigrants<br><br>Tourists/short-term visitors |

Handover/ Crossover Process

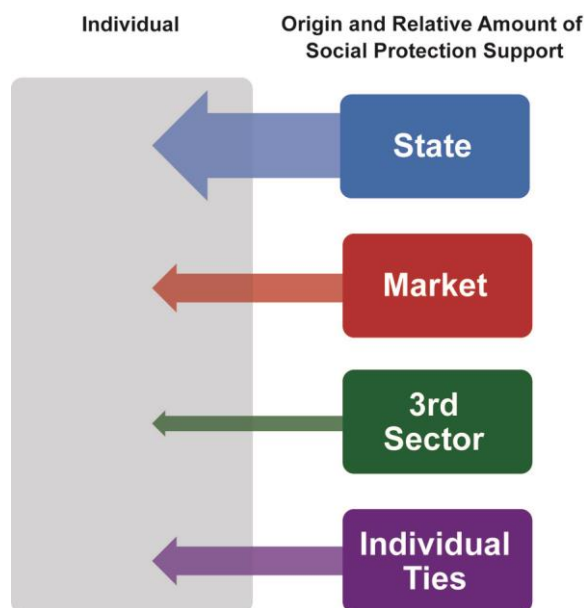| State B - Individual Status | Citizen | Non-Citizen |
|---|---|---|
| Resident | *B1*<br>'Natural-born' and Naturalized citizens | *B2*<br>Permanent residents (Green Card)<br><br>Students |
| Non-Resident | *B3*<br>Diaspora<br><br>Emigrants<br><br>Dual-citizens | *B3*<br>Illegal/ Undocumented immigrants<br><br>Tourists/short-term visitors |

While the logic of coverage in receiving states tends to be administered and regulated at the nation level, in many countries, particularly those with highly decentralized political systems, access and benefits vary considerably by state or region. In the US and in China, for example, sub-national and local jurisdictions have a great deal of discretion with respect to migrant coverage. Migrants' access to public systems of health insurance and healthcare provision, schooling, social welfare and pensions largely depends on place of residence and legal status. Therefore, as we discuss more fully below, an undocumented Mexican migrant from Puebla, who settles in New York City, will have access to a package of resources and benefits based on what she is eligible for in her village of birth, as a resident of the state of Puebla, and as a Mexican national as well as the services offered by New York City, New York State, and the United States. Her resource environment will differ markedly from a similarly undocumented Mexican counterpart from Zacatecas who moves to Los Angeles, because the services provided at each level of governance, in each country, are not equal.

The portion of the resource environment that comes from the migrants' sending country depends upon the extent to which that nation extends its social services across borders to cover citizens living outside its borders. For sending countries, such initiatives sometimes function as mechanisms for offsetting "youth drain" brought about by migration: people leave when they are young and healthy

but, had they stayed, they would have contributed more to health and pension systems than they took out. Instead, when they return, they have aged, and are in more intense need of care. Transnational health insurance or pension schemes can help balance out the allocation of costs between sending and receiving countries. Portuguese migrants who went to Canada in the 1940s and 50s, for example, returned home with the pension contributions they accrued in Canada because of special bilateral agreements . Some bilateral social insurance agreements, such as those between Germany and South Korea and China, extend the sending country's entire social insurance system to the receiving country for emigrants living abroad for a limited period. Even when sending country institutions are not extended, they can still function as a fallback option for emigrants. When migrants are ineligible for benefits from the British National Health Service or the U.S. Medicare program, those who can afford to, can return to their sending countries for care.

Let us now offer several illustrations to make these ideas clearer. The resource environment of a college educated, employed Swedish citizen residing in Sweden might look something like the graphic below. This graphic shows each of the four sources of social protection from which our hypothetical Swedish citizen could access support, with the size of the arrow reflecting the relative proportion of social protection coming from each source. This particular individual has access to a wide array of social protections from the state, including affordable child care, paid parental leave, excellent schools, old age pensions, and so on. Given her education and employment, she is also probably in a position to buy additional protections from companies in the private market, to access benefits from third sector organizations, and to avail herself of supports provided by family and friends. Her resource environment is largely bound within her nation-state, and she has little difficulty meeting her needs, even in emergency situations or medical crises.

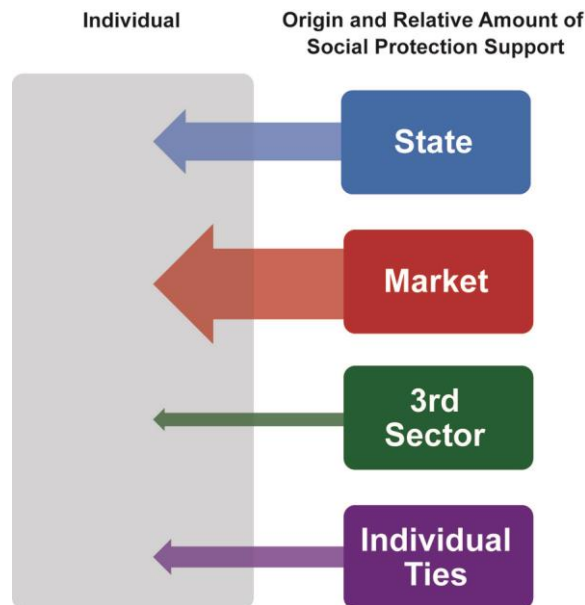**Figure 2: College-educated, employed Swedish citizen**



As Figure 2 reveals, all four sources contribute to the creation of this individual's resource environment, although the state predominates.

In contrast, the next figure represents what the resource environment of a college educated, employed, US citizen residing in the US might look like. The resources available from the state have shrunk in comparison to Sweden (thus the smaller arrow), and the market becomes a bigger factor in covering needed protections, precisely because the state is a less important provider and protector than

in Sweden and because this individual can afford to purchase care from the private market. This individual is also quite able to secure support from the third sector and from personal social ties. For example, when an elderly parent becomes ill and homebound, this person may rely on the state's Medicare program to cover health costs, may purchase additional pharmaceutical insurance coverage from the market, but may also access not-for-profit organizations working with the elderly to support her parents with home visits and other forms of emotional assistance.

**Figure 3: College-educated, employed U.S. citizen**



*In contrast to Figure 2, this individual purchases most of her social protection from the market.*

If we were to next imagine the resource environment of a US citizen living below the poverty line, her resource environment would again differ. In this case, the state would offer additional (means-tested) social protections, while the market would offer fewer; if she were unable to purchase care from the market, the size of this arrow would be negligible or non-existent. Instead, she would most likely rely on social protections provided by third sector actors (humanitarian NGOs, food pantries, charitable organizations, etc), and on informal social support from social networks of friends, family members, neighbors, and co-workers.

What motivates this research agenda is that, more and more, each of the four sources of protection that constitute resource environments cross borders. Let us imagine that the hypothetical person in Figure 4 is a Mexican citizen who currently lives in Los Angeles without documentation from the US government. She works in the informal economy, cleaning houses and preparing traditional Mexican foods to sell to Mexican construction workers at their work sites. Because of her undocumented status, she has no access to social protection provided by the US federal government, nor does she make enough money to purchase protections from the US market.

California, along with Hawaii, Washington, New York, and Minnesota offers public benefits to 'non-qualified' (as determined by federal law) immigrants (Fortuny and Choudry 2011). It stands out as the state that has moved most aggressively to extend publicly funded health coverage to immigrants with and without documents. Both can apply for 'Covered California', a publicly subsidized, state-

backed health care program. Although undocumented immigrants are technically ineligible for Covered California, the application process may determine that they are eligible for Medi-Cal, the state health care program for low-income residents.[2] Medi-Cal coverage for undocumented immigrants is not comprehensive, however, it is generally limited to pre-natal care, emergency services, and long-term care services (Dobbs and Levitt 2016).

Our hypothetical subject can also access some social protections from the Mexican government. As noted in our beginning vignette, the Mexican government has responded to the transnational lives of citizens by creating the *Instituto de los Mexicanos en el Exterior* (IME, or Institute of Mexicans Abroad). She can therefore access an array of civic, health, education, and financial services from the Mexican state through this program. Moreover, if she returns to Mexico when she retires, she would also be insured by the Seguro Popular system in Mexico (although she cannot access these supports while living in the US). Our migrant has also purchased a form of social protection from the Mexican market; she invested in a property in her home community in which she will live upon retirement.

Nevertheless, most of this migrant's social protection in the US is derived not from either states or markets, but from social ties and third sector support. Her California church has a food pantry that she accesses when work is hard to find and she does not have money for meals. She also takes free English classes offered by a migrant-support NGO operating in her Los Angeles neighborhood. And she relies heavily on family and friends in Los Angeles to provide temporary housing, credit, and job references. Meanwhile, our migrant's child continues to live in Mexico, and she relies on social ties in Mexico (specifically, her mother) to raise that child in her absence. Her child's social protections are also increasingly transnational, even though the child has never left her home village. The child relies on the Mexican state for health care, and market-based supports paid for by remittances from her mother. Moreover, the child benefits from an early-education intervention program provided by a local Mexican not-for-profit organization, but funded by a grant from the Netherlands.

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[2] Undocumented immigrants are eligible for Medi-Cal and legal non-citizen residents do not have to meet the five-year eligibility requirements required for federal benefits programs.

**Figure 4: Primary-educated, undocumented, Mexican migrant living in California and working in the informal sector**
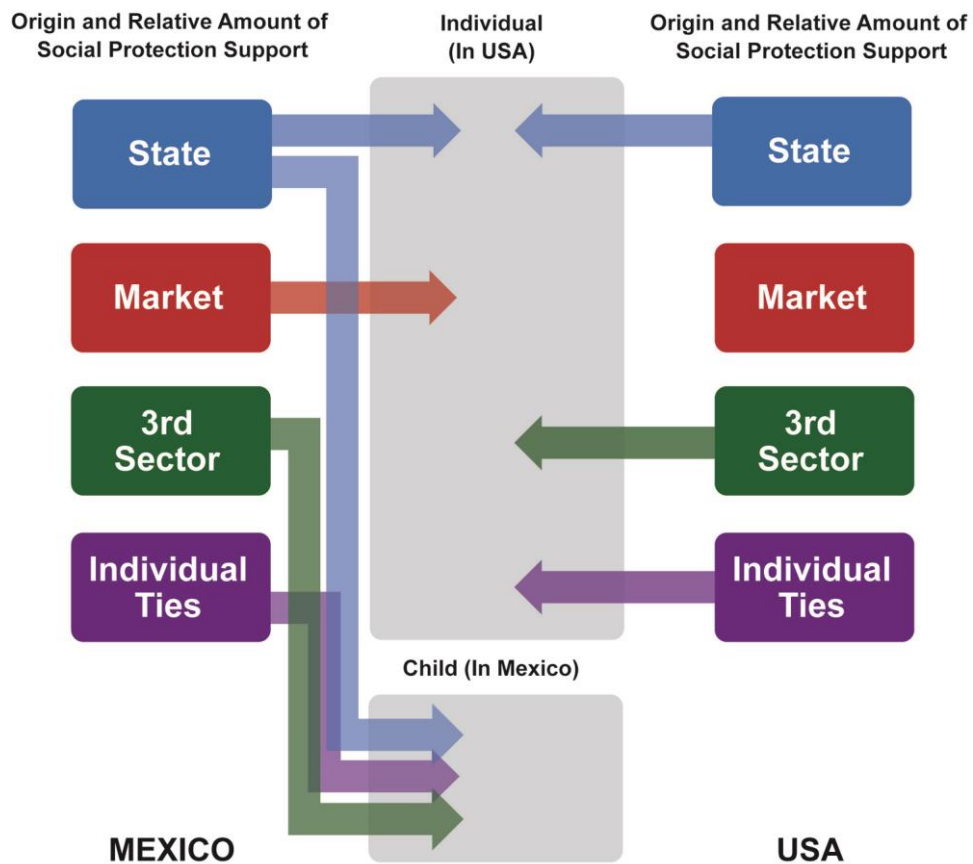


*Figure 4 reveals a resource environment created from the intersection between sending and receiving country sources. This undocumented Mexican migrant is ineligible for federal government protections in the U.S. and cannot afford to purchase them from the market. While she is eligible for some minimal services from the state of California, she relies primarily on support from NGOs and from her personal social networks. She combines these with other supports available in Mexico (a home she purchased through the market where she will live when she retires and support she receives to care for her child still in Mexico from the state, the third sector, and her social networks).*

Three things stand out in Figure 4. First, rather than having most of her needs provided by one, nationally-bound source (e.g., like the state in Figure 2, or the market in Figure 3), this woman must piece together social protection for herself and her family from a large number of *disparate, informal,* and *transnational* sources. Two, none of the possible social protection resources from which the migrant can draw is sufficient for covering her major social protection needs, as indicated by the relative thinness of each arrow. Third, the largely transnational sources on which this migrant relies are in no way contractually guaranteed, and thus are relatively unreliable and ephemeral. Whereas laws contractually obligate states to provide services to citizens, and whereas market forces ensure that most purchased protections will be provided, there is no such security for those who rely on resources from social ties and third sector organizations, each of which could opt to withdraw their resources at any time and without recourse for the migrant.

Research on social protection needs to examine not only the number and size of an individual's arrows over time and across individuals; it also needs to unpack the contents of the arrows themselves. Let's return to the example of the poorly educated undocumented Mexican from Zacatecas living in

Los Angeles and compare her this time to a similarly poorly educated, undocumented Mexican immigrant from Puebla living in Wyoming. As we already noted, their resource environments will differ because of the very different U.S. and Mexican federal, state, and city-level government benefits provided to immigrants and non-migrants. But they will also differ because the third sector might be much more plentiful, varied and well established in Los Angeles than Wyoming. The strength of the labor market in each locale is likely to differ such that different numbers and types of employers will be more or less amenable to hiring undocumented workers and to offering them benefits. Finally, that migrants would be more visible in Wyoming may make it more dangerous for them to access resources even when they are available.

Importantly, undocumented migrants are not the only ones facing increasingly fragmented and increasingly transnational resource environments. Documented individuals with financial means also are more and more likely to cross borders to seek social protection. For example, German families who cannot access or afford elder care in Germany may send their aging parents to an elder care facility in Eastern Europe, where costs are lower, or they may hire a Filipino immigrant to provide low-cost care in their homes. Meanwhile, newly-industrializing countries like China, India, and Kuwait now frequently give their citizens stipends to study in US or European universities, requiring these students to piece together transnational social protection packets while abroad.

In sum, our concept of a resource environment helps capture the complexity of social protections in an increasingly transnational world. Although most individuals access social protections from the same four sources (state, market, third sector, and social ties), the package of protections that results varies dramatically over time, through space, and across individuals. On the one hand, the content and size of each arrow varies widely independent of which individual is trying to access those resources because, for example, the Swedish state offers more protections than the US state. On the other hand, the social protections available to any person are strongly influenced by his or her individual characteristics—education, skills, resources, legal status, country of origin, country of residence, place of residence within a country, social networks, and so on. Our job as scholars is to uncover the patterns in individuals' resource environments, to make clear how they change over space and time, to rigorously measure their size and substance, and to bring to the fore patterns of exclusion—what kinds of people get left out and what kinds of services are they excluded from?

## 4. Global Social Protection: Sectoral Illustrations

In the following section, we include just three examples from the range of practices we believe should be understood and studied as global social protection: senior care, education, and labor. We note that not all aspects of the processes we describe function across borders. That is, it is useful to distinguish between the different dimensions of "global social protectors" and to compare how they work in relation to each other. Just as Levitt (2001) found that transnational political parties (i.e. their structures, goals, financing, leadership and strategies) did not always produce transnational political results (i.e. that they had a greater impact on Dominican politics than on U.S. politics), so some transnationally organized and funded institutions of global protection protect and provide in one place. Therefore, we must assess how organizations are structured, led, and financed in relation to where they deliver their services and where their greatest impact is felt. We find several examples of policies and programs where structures and financing are organized across borders but the services that are delivered and their impact are not.

### 4.1 Labor

Since so many people move to find work, it is not surprising that transnational schemes have emerged to protect migrant workers, who are often more vulnerable to economic and physical abuse than laboring citizens. In some cases, extending global social protections to labor gives rise to new legal

statuses that expand existing worker protections to new categories of migrants. For instance, New Zealand's Recognized Seasonal Employers Scheme started in 2006 to offset shortages in the horticulture and viticulture industries by bringing in temporary workers but also by curbing "labour and immigration violations through the expansion of regular labour migration avenues" (ILO 2014). More than 100 New Zealand firms registered with this program that hires 8,000 workers from Pacific Island countries annually. As documented migrants, seasonal workers entering New Zealand even for a few short months are entitled to regular work protections including minimum wage, paid public holidays, sick leave, workplace safety training, and accident compensation. In the first year of the program, however, "administrative complexity" in the rural areas where seasonal workers were situated resulted in routine violations of workers rights, especially around unpaid or delayed wages and the reporting of accidents. Employees also had little recourse against employers who misrepresented working conditions, living accommodations, and even earnings (Maclellan 2008). Nonetheless, the Recognized Seasonal Employers Scheme is promoted by the International Labor Organization as a "good practice model" since it allows seasonal migrants to work legally, with some basic level of protection, and it balances the interests of the three key stakeholders—employers, migrants, and government.

In cases where labor migrants are not afforded sufficient social and legal protections in host countries, sending countries may step in to fill the gaps. Saudi Arabia is particularly notorious for failing to extend basic rights and services to the more than 1.5 million migrant domestic workers, largely from Asia, who work within its borders. Domestic workers are subject to harsh and often violent treatment by their employers, who control their passports and prevent them from communicating with the outside. When accused of crimes, domestic workers enter a hostile legal environment where they may not have access to translators or basic legal services even if they face execution (HRW 2008). Such circumstances led Indonesia to institute an extreme measure of social protection for its citizens: a total ban on migration to Saudi Arabia to perform domestic labor. The ban was lifted in 2014 following the successful negotiation of an agreement between the Indonesian and Saudi government which guarantees Indonesian domestic workers the right to monthly pay, time off, the ability to communicate with their families, and to retain their passports (BBC 2014).

The state is not the only institution protecting workers. In 2012, eight dormitory operators formed the Dormitory Association of Singapore in response to strikes by foreign laborers protesting unacceptable living conditions. The association aims to improve the welfare of the more than 1 million foreign workers in the construction, shipping, manufacturing, and service industries in Singapore and sets minimum standards for their living accommodations. The association works closely with state regulatory agencies, but maintains its autonomy ("Singapore Foreign Workers Dormitory Guide"). The Singaporean Parliament has just passed legislation to more closely regulate and improve standards in these dormitories ("Foreign Employee Dormitories Bill" 2015). Despite such proactive regulation, living conditions for many workers still remain problematic because the law does not extend to smaller dormitory operators and employer-operated dorms where deplorable living conditions persist (Tan 2015). And regardless of dormitory conditions, many workers are unable to access healthcare, notably due to lack of information about the costs of receiving care (Lee et al. 2014).

The Association of Pakistani Physicians and Surgeons (APPS) of the United Kingdom is another instance of a non-government organization offering social protection to migrant workers. Despite being high-skilled and relatively highly paid, foreign-born medical professionals face different kinds of challenges than their native-born peers. As the Association states: "According to statistics, many more overseas doctors face disciplinary action by their employers and the General Medical Council (GMC). APPS is committed to help any Pakistani doctor or medical student who faces disciplinary action. We have sent our representatives to accompany the doctor on disciplinary hearings and provided support and guidance throughout the process. Many of these doctors were not even our members at the time." In fact, the APPS is an example of an institution that addresses social protection needs in multiple sectors simultaneously. It also organizes projects to support health care system

development in Pakistan, matrimonial services for its members living in the UK, and cultural programs for children ("Association Of Pakistani Physicians and Surgeons").

## *4.2 Education*

Global social protection in education often develops in response to large migrant populations who emigrate from a single country and settle in a single host country, such as the 3 million people of Turkish origin living in Germany. While both countries have their own domestic education systems, some bilateral, cooperative research and education activities have also taken shape. These are becoming increasingly institutionalized, through partnerships between ministries and publicly funded actors such as the German Research Foundation or the German Academic Exchange Service. For example, in higher education, there are joint stipend programs. A public German-Turkish University is under construction in the city of Istanbul. Three public Goethe Institutes in Ankara, Istanbul and Izmir provide basic language education (MBF). Moreover, there have been several high-level public discussions about coordinating teacher training between the two countries. In 2008, Prime Minister Erdogan offered to send teachers to Germany to provide Turkish language instruction to German educators. Chancellor Merkel and the German government, however, chose to emphasize German-language education. They preferred to train people of Turkish origin to become teachers in the German school system and to teach in German ("*Bildung Und Forschung: Türkei*").

The Gülen Movement is an INGO which runs an extensive educational system across borders. Fethullah Gülen, a Sufi Muslim currently living in exile in Pennsylvania, founded this transnational organization. The movement runs 1,000 schools in 163 countries worldwide (Ebaugh 2010; Sunier 2014) and several private universities. In Germany alone, there are 20 private schools associated with the Gülen Movement as well as 300 institutes for private teaching and coaching. Their aim is to improve Turkish pupils' access to higher education because Turkish pupils are under-represented in German *Gymnasiums*. Instruction takes place in Germany as the school organizers, like the German government, are skeptical about Turkish language education. While these schools receive most of their funds through school fees and philanthropic contributions, they sometimes receive support from local German governments (Rasche 2013; Schlötzer 2014; Vitzhum 2008).

Other examples of education provided across borders arise more spontaneously, in response to particular needs. When an influx of Mexican migrants arrived in Aurora, Illinois, city officials recruited teachers from Mexico who had the linguistic and cultural skills they needed. During the 1990s, New York City school teachers traveled to the Dominican Republic each summer to learn more about the context from which so many of their students had come. Along the U.S.-Mexican border, where families have intermarried for generations, pupils who reside in Mexico but who have U.S. passports or Green Cards cross the border each day to attend public schools in Texas, California, Arizona, and New Mexico (Layton 2014). In these examples, students, teachers, materials, and educational programming and funding are organized across borders and there may be cases in which diplomas are valid on both sides as well. One of the programs mounted by the *Instituto para Mexicanos en el Exterior* is to provide teaching materials to adult education programs in California so that Mexicans on both sides can follow the same high-school equivalency curriculum (Sabates-Wheeler and Feldman 2011).

These efforts do not stop at primary and secondary school education. The High-Level Forum on Higher Education, Innovation, and Research between the U.S. and Mexican Governments, "will encourage broader access to quality post-secondary education for traditionally underserved demographic groups, especially in the science, technology, engineering, and mathematics (STEM) fields. It will also expand educational exchanges, increase joint research on education and learning, and share best practices in higher education and innovation" (U.S. Department of State 2013). Joint and double degree programs are burgeoning sites for the internationalization of education. This is not just about U.S. and European universities creating campuses overseas or in partnership with

universities in Asia and the Middle East. These are important instances of global social protection because they aim to provide graduates with credentials and training that are valid in multiple places. Joint degree and credentialing programs, such as the one created by Cambridge College in Massachusetts, for example, allow students to study in Brazil and the U.S. and complete a degree that is valid in both countries.

### *4.3 Senior Care*

Due to its rapid demographic transition, the high cost of labor, and labor shortages, Germany has become a leader in outsourcing elder care. Even though Germany made long term care insurance mandatory in 1995, it is still too expensive for many families. Therefore, caring for the elderly in the long term care facilities of neighboring countries with lower labor costs, such as Poland, Slovakia or the Czech Republic, is a more attractive and affordable alternative. In 2012, about 7,000 German pensioners were living in facilities abroad. In addition to Eastern Europe, countries like Spain and Thailand are also becoming increasingly popular destinations (Connolly 2012; "*Deutsche Rentner*" 2014; Schölgens 2013).

Private companies are quickly jumping on this bandwagon, developing transnational models for long-term care, most commonly in Eastern Europe and South-East Asia. In Eastern Europe, some German and local private investors have received financial support from the European Union to upgrade elder care facilities. Although they create high-end institutions that provide excellent care to elderly Germans who can afford to pay, they are often beyond the reach of the local Eastern European population. A kind of two-tier system is created by this medical tourism that diverts resources from locals to attract high-end, self-paying tourists. Critics claim that the influx of German pensioners into neighboring countries like Poland creates capacity shortfalls that necessitate the relocation of local seniors to other, cheaper countries such as the Ukraine. Germany's inability to deal effectively with its aging population and to reform its long-term care sector, therefore, may disproportionately burden Eastern Europe by importing net-payers into the social security system (young immigrants who come to Germany to provide elder care) and by exporting net-users out of the social security system. Public debate about these issues has been highly emotional. The Sozialverband Deutschland (VdK), a German organization which advocates for social rights, calls the export of the elderly a "deportation" (Cohen 2015; Connolly 2012; "Deutsche Rentner" 2014).

These dynamics in Europe reflect broader global trends as baby-boomers around the world reach pension age and increasingly need long-term care. Singapore is also outsourcing elder care to Malaysia where private investors are exploring underdeveloped markets (Shobert 2013). Similarly, US senior citizens increasingly move to Mexico to retire, because the costs of living and long-term care are much lower than in the US. While medicare benefits are not accessible outside of the U.S., there are increasing demands that the program be extended across borders (Blahnik 1999; Paxson 2012).

## 5. Looking Forward

In today's world, more than 220 million people live in a country that is not their own. This is almost ten times larger than the entire population of Australia, and six times larger than the entire population of Canada. At current growth rates, the population of this "nation" of immigrants will soon surpass that of the United States, constituting the fifth largest "nation" on earth.

The increasingly transnational lives of individuals parallel the heightened cross-border movements of markets, firms, churches, labor unions, and humanitarian organizations. More and more, even national governments are carrying out what we once thought of as national-level activities at a transnational level.

Yet despite these pockets of institutional change, the provision of social protection, and the policy-making that undergirds it, is still primarily done by nations. We expect that transnational migrants must increasingly turn to non-state systems of global social protection to piece together coverage to meet their basic needs. To date, we know little about which protections exist, which protections travel across borders, who can access these protections, and who is left out. We know little about what the hidden costs are of providing and accessing global social protections. We do, however, suspect that while these newly emerging forms of social protection have begun to adapt to the mobile lives of the people they serve, they still come up short, particularly among individuals without power and resources.

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