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# **Analysis of bilateral and multilateral social security agreements as they relate to OAS Member-state worker pensions**

**(Draft for comments)**



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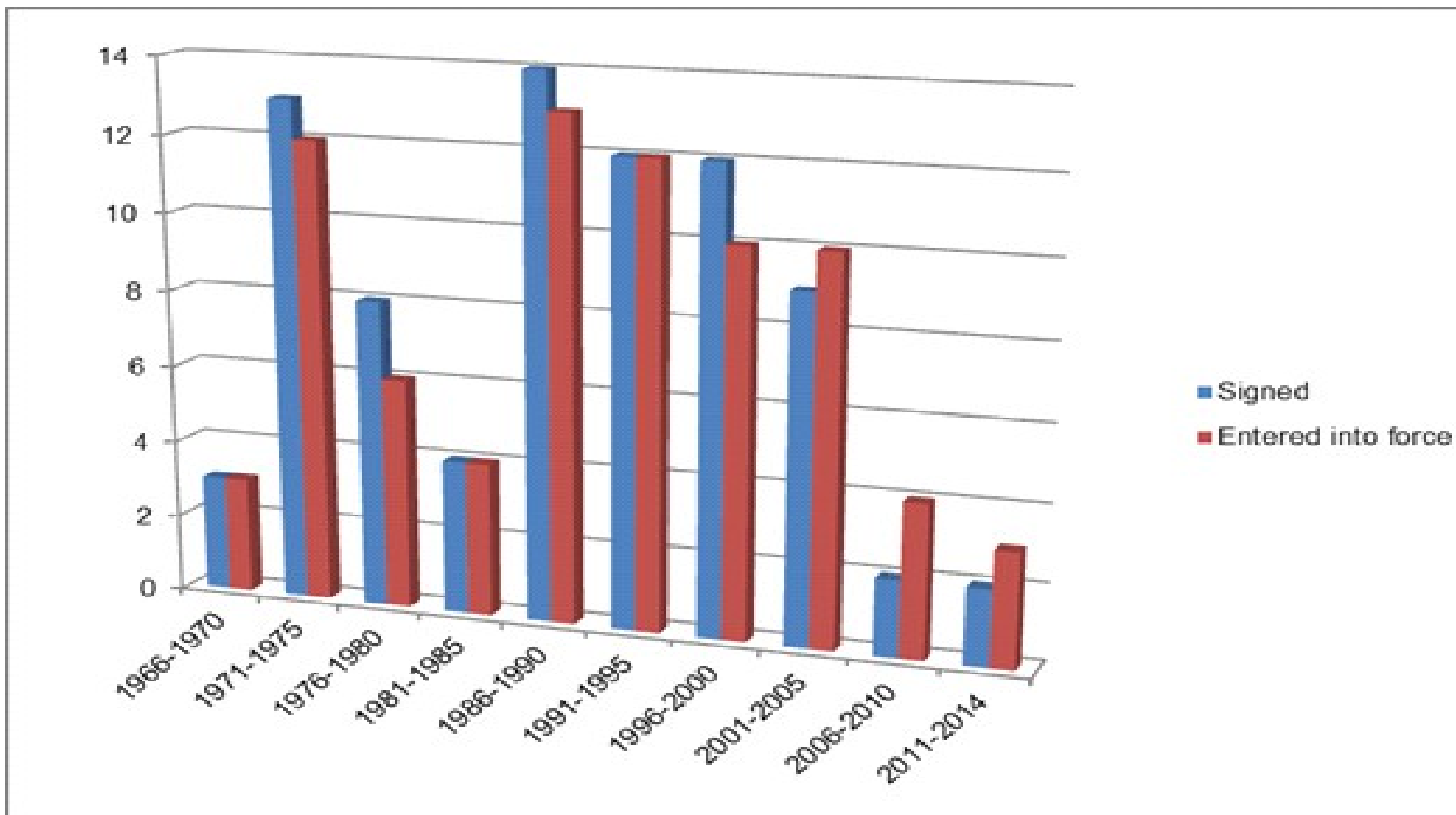
## Scope of analysis

Type of agreement	Number of agreements	Percentage
Purview includes pensions	58	73.4
Purview limited to benefits, social security issues other than pensions	21	26.6
<b>Total</b>	<b>79</b>	<b>100.0</b>
Repealed due to MERCOSUR	4	N/A
Repealed due to CMISS	8	N/A

- Includes American hemisphere, Spain and Portugal



## Signing and entry into force of agreements, in 5-year increments





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## **Bilateral social security agreements analyzed**

1. Canada-United States of America Convention
2. Jamaica-Canada agreement
3. Chile-US agreement
4. Nicaragua-Costa Rica agreement
5. Argentina-Chile agreement
6. Colombia-Spain agreement



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## **Multilateral social security agreements and accords**

1. Latin American Multilateral Agreement on Social Security (CMISS)
2. CARICOM Agreement on Social Security
3. MERCOSUR Multilateral Agreement on Social Security
4. SICA Multilateral Agreement on Social Security
5. CAN Andean Social Security Instrument



## Emigrants and immigrants from countries within the Americas

Subregion	Total population*	Total emigration within the Americas	% of subregion population	Total immigration within the Americas	% of subregion population
<b>North America</b>	<b>355,361,8</b>	<b>4,300,1</b>	<b>1.2</b>	<b>27,578,3</b>	<b>7.76</b>
<b>Mexico and Central America</b>	<b>167,387,5</b>	<b>17,445,8</b>	<b>10.4</b>	<b>1,774,8</b>	<b>1.06</b>
<i>Mexico</i>	122,332,4	13,212,4	10.8	1,042,3	0.85
<i>Central America</i>	45,055,1	4,233,4	9.4	732,5	1.63
<b>Caribbean</b>	<b>42,517,4</b>	<b>7,705,8</b>	<b>18.1</b>	<b>1,071,0</b>	<b>2.52</b>
<b>South America</b>	<b>406,739,7</b>	<b>1,155,2</b>	<b>0.3</b>	<b>4,330,6</b>	<b>1.06</b>
<b>Total</b>	<b>1,139,393,9</b>	<b>41,003.7</b>	<b>3.6</b>	<b>34,754,7</b>	<b>3.05</b>



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## Percentage of working-age population actively contributing to pension scheme

Subregion	%
Caribbean	55.5
Mexico and Central America	27.0
South America	30.2
North America	73.5
<b>Average</b>	<b>46.6</b>



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## Pension funding scheme types

Funding scheme	# of nations	% of nations
Funded	25	71
Individual capitalization	6	17
Funded and individual capitalization	4	11
<b>Total</b>	<b>35</b>	<b>100</b>





## Individuals benefiting from social security agreements

Nation or territory	Individuals benefited	Observations
Antigua and Barbuda	43	
Brazil	12,325	For the period 1994-2015. Of these, 835 correspond to the Americas; 6,092 to Portugal; 3,341 to Spain; and 2,057 to other countries.
Canada	95,000	Individuals residing abroad in 56 countries with which Canada has agreements.
Chile	4,043	Pensions paid from within Chile to Argentina, Brazil, Canada and Quebec, Colombia, Ecuador, United States, Peru and Uruguay.
Colombia	524	
Ecuador	15	12 from Chile and 3 from Uruguay
United States of America	212,064	Under the terms of 25 agreements.
Mexico	469	De 2010 a 2014.
Dominican Republic	1,031	122 claims for benefits sent to Spain and 909 responses processed in Spain.
St. Lucia	66	
St. Kitts and Nevis	33	CARICOM citizens.



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## Conclusions and recommendations

According to the Medellin Plan, an analysis of currently-underway agreements will shed light on which factors need to take precedence when OAS member States begin to design and negotiate a hemisphere-wide mechanism; especially one aimed at the recognition of migrant workers' social security contributions and pension rights. The following is a list of factors that should be taken into account:

- Realistically value the economic implications of the agreement for each signatory State.
- Recognize within each State, the rights of persons that have made contributions to social security, disregarding their migratory status.
- Guarantee equal treatment and consider the situation of the different groups that compose the universe of potential beneficiaries of the agreement.



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## Conclusiones y recomendaciones

- Take into account the exogenous factors.
- Focus on the common goal during the negotiation phase of the agreement.
- Involve in the negotiating teams experts of social security and other institutions that will be taking the role of liaison bodies in the administration of the agreements.
- Recognize the economic impact of the application of these agreements.
- Create a flexible, regularly-scheduled and highly-efficient review mechanism by which the agreement might be adjusted vis-à-vis legislative changes occurring in the signatory States.
- Disseminate the agreement widely in each of the member countries so that all the potential beneficiaries are aware and informed about it.



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Thank you