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REBUILDING AN INCLUSIVE, VALUE-BASED EUROPE OF SOLIDARITY AND TRUST THROUGH SOCIAL INVESTMENTS

Social protection from a social investment perspective

State of the art

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Social protection from a social investment perspective: state of the art

The Re-InVEST.be project builds on a European Re-InVEST project that was carried out under the EC's Horizon 2020 programme between 2015 and 2019. In that Re-InVEST research (Rebuilding an Inclusive, Value-based Europe of Solidarity and Trust through Social Investment – see re-invest.eu) we developed a comprehensive conceptual framework as well as a participatory approach that enable the evaluation and (if needed) re-design of social inclusion policies. The theoretical framework builds on capabilities and human rights as building blocks for the social inclusion and wellbeing of individuals. The notion of capabilities (Sen, 2005) reflects the set of opportunities that individuals dispose of to transform resources into a bundle of beings and doings that they have reason to value. Hence, capabilities depend on (a) the amount of (material, financial, human, social, cultural) resources at one's disposal, (b) the 'conversion factors' that determine the potential outcomes of the transformation process with given sets of resources, and (c) the freedom one has to choose. Poverty can therefore result from a lack of resources, constraining conversion factors, and/or lack of free choice. From a dynamic perspective, poverty can in turn constrain households' investment in their own resources (housing, education, health etc.), thus ending up in vicious circles of deprivation.

The fight against poverty is also based on human rights, because the universal economic, social and cultural rights in particular aim to protect vulnerable groups against extreme risks that jeopardise their human dignity. Yet, formal human rights do not automatically result in improved wellbeing: it is necessary to understand the shifting borders between shared values, social norms and legal obligations in diverse contexts. The Capability Approach can help to shed light on this complexity: different contexts of work, urban life, health and safety, have an impact on the implementation of universal rights at individual level. For example, how to take care of people with mental disabilities? What does "social citizenship" mean in contexts of "fragmented citizenship" (Sassen) that we observe in our cities? How to articulate social rights with flexible work contexts?

For the implementation of human rights, different types of policy measures need to be implemented: legislation, (public) services, subsidies, social transfers, judicial enforcement... Governments can also transfer power and financial resources – either directly to individuals or households (e.g. social benefits), or to companies and civil society organisations (e.g. employment or training subsidies). These 'collectives' in turn interact with individuals. They can invest in their capabilities, empower vulnerable households through collective action, or constrain their capabilities by exerting pressure or indeed exploiting them. In sum, social investment-related measures may affect individual capabilities in many ways: by invest¬ing in (tangible or intangible) assets, by transferring financial resources that allow households to invest in themselves, by strengthening their rights and freedoms through regulations, or indirectly, by strengthening the agency of collectives that interact with vulnerable people.

In this framework, social investment gets a threefold meaning:

- First of all, governments invest (in cash or in kind) in the capabilities of socially disadvantaged individuals. What matters in this context is to enhance people's capabilities in a sustainable way – so as to achieve the largest possible long-term welfare gains.
- The adjective 'social' moreover suggests that such investments yield benefits for society, over and above those for the direct beneficiaries. For example, early childhood services have enormous long-

term benefits for the participating children, but also for their parents and for society at large, thanks to reduced social risks in later life.

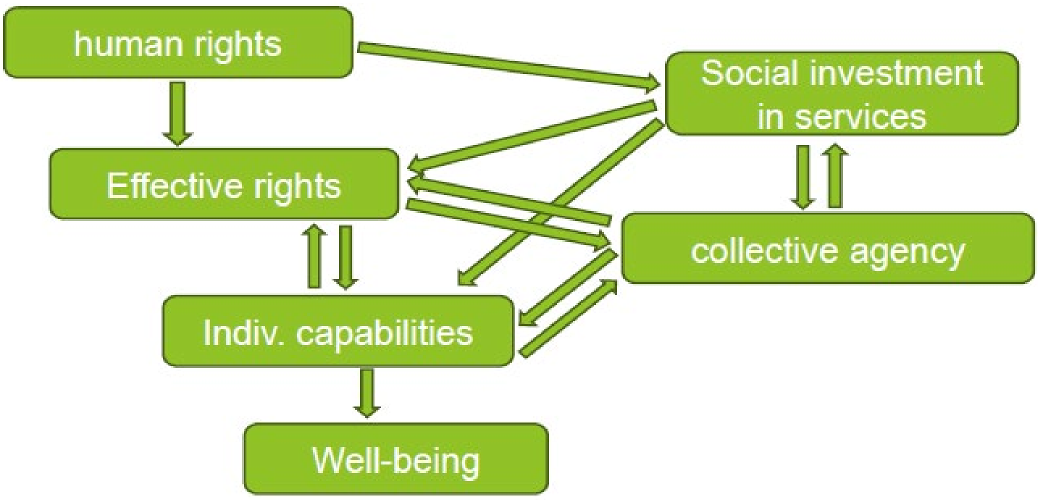
- The third connotation of social investment relates to investment in the 'collectives' (institutions, movements, associations, enterprises, local communities, families) that interact with individuals. Through collective agency, individuals can enlarge their capabilities.

An overview of the theoretical framework: social investment, capabilities, human rights

The social investment (SI) approach constitutes a relatively recent perspective in the literature on welfare state and social protection. Most generally, the SI approach was defined by its main proponents as a set of welfare policies that are needed "to prepare individuals, families and societies to respond to the new risks of a competitive knowledge economy, by investing in human capital and capabilities from early childhood through old age, rather than in policies that simply 'repair' damages after moments of economic or personal crisis." (Hemerijck, 2013, p. 242). Theoretical literature on the social investment perspective has burgeoned in recent years, resulting in the development of a dynamic research agenda. Beyond the theoretical developments, the introduction of the Social Investment Package in 2013 (European Commission, 2013) has furthered the discourse on the SI approach in the social policy area.

In contrast to a narrow understanding of social investment perspective, Re-InVEST.be adopts an innovative and broader definition of social investment. Namely, social investment refers to *the investment of resources into people-, more precisely, into the sustainable enhancement of individual and collective capabilities*. The overall theoretical framework of Re-InVEST.be builds on capabilities (Sen, 2005) and human rights as building blocks for the social inclusion and wellbeing of individuals, as reflected in Nicaise et al. (2017).

Figure 1 From human rights and capabilities to individual well-being



The universal economic, social, and cultural rights aim to protect vulnerable groups against extreme risks that jeopardise their human dignity (De Munck & Lits, 2017). Nevertheless, considering that the formal *human rights* do not automatically result in improved wellbeing, it is necessary to understand the shifting borders between shared values, social norms, and legal obligations in diverse contexts. Hence, although some legal measures may establish *effective rights* (e.g. a guaranteed access to basic services), most policies

necessitate additional '*social investment'* in individual and collective capabilities through public or subsidised service provision (e.g. ECEC, health care) and the transfer of power and resources – either directly to individuals / households (e.g. social housing), or to companies and civil society organisations (e.g. subsidies to housing companies, water distribution, ECEC providers).
In this context, the term "social investment" does not only refer to investment in public infrastructure (e.g. social housing estates, health infrastructure), or in individual's human capital (e.g. improving people's health), although such material and human capital investments may be part of the picture, but to a broader concept of investments that support the development of capabilities. In this context, *social investments* can enrich individuals with tangible and intangible assets (e.g. financial resources, education, improved healthcare and wellbeing), as well as reinforcement of rights, and in turn, expand one's capabilities set (Nicaise, 2017). Enhancing the individual's capabilities leads to a virtuous cycle of further investments in multidimensional assets, expanding capabilities and *wellbeing*. Vice versa, a lack of assets (e.g. income, healthcare, education) translates into under-investment, which in turn results in a weakening of capabilities and leads to a vicious cycle of depreciation and disinvestment.
Finally, another dimension of our theoretical framework relates to the extension of *collective* resources and capabilities. As local authorities, non-profit companies and civil society organisations are strengthened (e.g. regional / municipal water companies, mutual health insurance associations, parents' associations) they may in turn improve the well-being of households.

To sum up, the social investment perspective on social protection adopted in RE-InVEST.be is by nature *multidimensional*: namely, social benefits should allow people to invest in their capabilities, in the broadest sense (health, housing, education & training, mobility, connectivity, social participation, and other areas) (Murphy, Nicaise et al. 2017).
Given the multidimensionality of social investment approach, Re-InVEST.be, in its work packages, considers three different areas of investment, which are deeply interconnected: social protection (with a focus on labour market integration), housing conditions, and healthcare. These interconnections are recognised by a growing body of literature. For example, recent research into housing or housing insecurity demonstrates that poor housing situation contributes to deteriorating mental health of the individuals (Gili, Roca et al., 2012; Keene, Cowan et al., 2015; Meltzer, Bebbington et al., 2013; Nettleton & Burrows, 1998). The relationship between unemployment and increased risk of mortality, morbidity, long-term health problems, and mental health is also well-established (European Commission, 2013, 2015, 2016; Bartley & Plewis, 2002, Montgomery, Cook, Bartley & Wadsworth., 1999, Vaalavuo, 2016). Similarly, living in a situation of poverty and vulnerability appears to have a negative impact both on physical and mental health (OECD, WHO, 2003; CPS, 2019). Therefore, social investment into areas of health and housing via housing allowance or health-related benefits can be expected to have positive effects on other areas of individual well-being and capabilities. In Re-InVEST.be such effects will be examined using both cross-sectional and longitudinal analyses.

Theoretical perspectives on social security and labour market policies

Originally social protection[1] in Belgium and in Europe was developed as social instrument schemes, hence being an instrument to insure employees against industrial risks, such as professional accidents, loss of employment and old age. Therefore, jointly with the fact that poverty and unemployment are strongly

1 In this report, social protection is defined as "the set of policies and programmes designed to reduce and prevent poverty and vulnerability throughout the life cycle" (ILO, 2017, p. xxix) and it is used as a synonymous of social security. In this context, social protection schemes included both social insurance schemes and social assistance.

interlinked, unemployment insurance and labour market policies represent one of the pillars of social protection[2].

Unemployment insurance and benefits have a twofold purpose: on one hand, they protect individuals against the risk of income loss deriving from losing one's job (social insurance[3]); on the other hand, they contribute to income redistribution and poverty containment (social assistance[4]) (OECD, 2020). In this framework, an extensive literature exists that discusses the optimal design of unemployment schemes in terms of balance between active labour market policies (e.g. training, subsidized employment, tailored services) and social transfers (i.e. cash or in-kind benefits from one group in a society to another group in need of social help), as well as their effects on re-employment and inclusion. Overall, three main perspectives can be distinguished (Nicaise, Lewhess-Litzmann, 2018; Lehwess-Litzmann, Nicaise, 2018b; Lehwess-Litzmann, Nicaise, 2020).

First, the *orthodox neoliberal approach* views individuals as economic actors, 'homo economicus', who compare the costs of employment with the income from welfare benefits when making their decisions on labour market participation. According to this perspective, "generous" (unemployment) benefits, are believed to increase the reservation wage and therefore to constitute a disincentive a job search and to prolong unemployment duration (moral hazard). Several neo-liberal scholars had also sceptical opinions on the effectiveness of active labour market policies (ALMP) because of their fiscal costs, even if some others had more positive views on their effects in terms of employment gains and the containment of wage inflation (Lehwess-Litzmann, Nicaise, 2018b). Overall, this orthodox perspective has found some support both in the micro-level studies focused on the effect of labour market policy changes in a specific country and in the macro-level research that compares unemployment rates of countries over time. For example, van Ours and Vodopivec (2006) analysed the impact of a substantial reduction in the potential duration of benefits in Slovenia. This policy change had a positive effect on the exit rate from unemployment for several categories of unemployed individuals and for unemployment spells of various lengths (van Ours & Vodopivec, 2006). Similar positive effects between a reduced duration/generosity and unemployment spells were found in other European countries (Austria: Winter-Ebmer, 1998; Lalive, Van Ours et al. 2006; Poland: Puhani 2000; Finland: Kyrä & Ollikainen, 2008, France: Le Barbanchon, 2016).

The findings of other empirical studies based on cross-country comparisons demonstrate that countries with generous benefit programmes suffer higher unemployment rates than countries with less "generous" benefit programmes (Layard et al, 1991; Nickell, 1997).

The second, *conservative paradigm* in social protection and labour market policies is founded on the belief that a strong individual responsibility is involved in the persistency of poverty and unemployment situations. According to this view, "generous" social security transfers would not only discourage re-employment, but also reinforce a dependency culture with inter-generational transmission (e.g. Murray, 1990, Dalrymple, 2001). Hence, the optimal design of unemployment schemes should foresee strict conditionality, restrictions in eligibility requirements, sanctioning and monitoring. Similarly, the most suitable labour market policy in the welfare-to-work reforms consists on a combination of PLMP and ALMP aimed at activating jobseekers through increased sanctioning, monitoring and assessing the willingness to work (Lehwess-Litzmann,

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2 Notably, theoretical perspectives on old-age benefits have not been included in the paper, as the focus of the study is on working age population.

3 In this report, social insurance is defined as "social security that is financed by contributions and based on the insurance principle: that is, individuals or households protect themselves against risk by combining to pool resources with a larger number of similarly exposed individuals or households"(Norton et al., 2011, p; 10).

4 In this report, social assistance is defined as collective (i.e. public or non-public) "actions which are designed to transfer resources to groups deemed eligible due to deprivation" (Norton et al., 2011, p; 10).

Nicaise, 2018b; Vooren, Haelermans, Groot et al., 2019). Concerning the effectiveness of these reforms in lifting individuals from unemployment and inactivity, the literature presents mixed findings. Supporters to welfare-to-work reforms point at the positive effects achieved with the 1996 Personal Responsibility and Work Orientation Reconciliation Act in the US (Schoeni & Blank, 2000) and the Hartz Reform in Germany, despite other scholars also identified negative outcomes of these policies on poverty and vulnerability (e.g. Bargain et al. 2006; Petrongolo 2008). In addition, other critics to this approach argue that tight conditionality measures, if not carefully designed, can generate income losses in vulnerable groups, hence enhancing poverty (Carcillo & Grubb, 2006) and that precipitation into work without proper upskilling or reskilling and additional measures can lead to dropouts from employment (Nicaise, Lehwess-Litzmann, 2018b). For example, in Belgium, the reports of the CPS (Combat poverty service) show that an increased focus on the flexibility of the labour market leads to a rise in temporary contracts and a reduction in the quality of the employment. (CPS, 2015).

Both the above-described approaches oppose strong arguments about the "generosity" and high extent of welfare position. Nevertheless, critics of these welfare-pessimist perspectives point out that the detected effects of the size and duration of social benefits on (un)employment are only modest or even small (Atkinson & Micklewright, 1991; Howell & Rehm, 2009; Lehwess-Litzmann & Nicaise, 2019; Sjöberg, 2000). An additional argument is that a decrease in unemployment rate is not always equivalent to an increase in employment. A reduction in the amount of benefits and/or their duration may cause job seekers to get discouraged. As the result, they may stop looking for jobs altogether and turn inactive rather than making the transition to employment (Howell & Rehm, 2009; Lehwess-Litzmann & Nicaise, 2019; Petrongolo, 2008; van Ours & Vodopivec, 2008). In the context of Belgium, for example, the statistics from the National Employment Office show that 45% of the permanently suspended unemployed did not appear in any other register (employed, unemployed, GMI, sickness or disability, pension, among others) afterwards (Callewaert, 2015).

Several factors at the individual-level may also influence the relationship between benefit generosity and the labour market status of the individual. For instance, individuals may attach emotional value to being employed, independently of the generosity of the unemployment benefits. They may dislike being unemployed, while being employed results in a feeling of (self-)recognition, structures the daily routine, and provides possibilities for socialization, among other reasons (van der Wel & Halvorsen, 2015). At the same time, being unemployed for a long time can have detrimental effects, which are recognized by most job seekers. Long-term unemployment can have a scarring effect (Nilsen & Reiso, 2011) and result in the depreciation of one's human capital, reducing a persons' employability, and resulting in (mental) health problems (Brenner, 2013; 2015, 2016) and social isolation (Gallie, 1999, Gallie et all, 2003). Individuals are thought to be aware of these effects and are thus willing to (search) work in order to avoid (further) decline in their employability, even when unemployment benefits are generous (Lehwess-Litzmann, Nicaise, 2019).

Stricter labour market legislation can also have adverse effect of reducing the number of available quality jobs for job seekers (CPS, 2015). This, in turn, influences the degree of division between labour market insiders and outsiders (Biegert 2014; Fervers and Schwander 2015). This division moderates how generous welfare benefits affect unemployment (Biegert, 2017): the job-search subsidy function of generous benefits can outweigh potential disincentives to work, which results in lower unemployment rates, but this effect can only occur if the labour market offers jobseekers attractive opportunities.

The above-mentioned arguments in favour of "generous" social transfers[5] constitute the founding basis of the third emerging paradigm in social protection, the *social investment perspective,* which advocates for high welfare provision and "generous" benefits in combination with sustainable and decent ALMP, in order to invest in human capital and more broadly, capabilities and consequently in people's employability. In the literature, supporters of welfare state "generosity" recognize that relatively high benefits may prolong

5 In this framework, "generosity" refers to high level of benefits, long duration of the benefits, broad coverage and low conditionality. Given the risk that this term would be labelled as inadequate because of its moral connotation, it will be used in quotation marks. (Lehwess-Litzmann, Nicaise, 2019).

unemployment spells but claim that these benefits also have positive effects that, in some cases, may offset the disincentifying effect (Biegert, 2017; Pollmann-Schult & Büchel, 2005). Benefits are seen as a job-search subsidy or financial resource (Lehwess-Litzmann & Nicaise, 2020) which relieves the financial pressure associated with income loss and gives the individual the possibility to take time to search for an appropriate job or even invest time in further education and training (Estevez-Abe, Iversen & Soskice, 2001; Morel, Palier & Palme, 2012). The proponents of this strategy argue that it will result in better job matches and fewer job changes (Gangl 2004; Büchel & Pollmann- Schult 2005). Although receiving "generous" benefits may result in individuals taking more time to find a job, making unemployment spells longer, it may result in a better job quality for the following employment (Pollmann-Schult & Büchel, 2005), longer subsequent employment duration (Gangl, 2004), and less unemployment in the long run. Groenez & Nicaise (2004) find that, at the macro-level, higher unemployment benefits and longer entitlements have a positive impact on mobility into (decent) work. From the social investment perspective, such positive effects of longer entitlements on (aggregate) re-employment chances can be explained by the fact that income security allows jobseekers to invest in their skills and competences and prevents them from accepting precarious jobs.

Nevertheless, similar to the empirical findings supporting the neoliberal perspective, the evidence for the effect of (unemployment) benefits and labour market inclusion is mixed. Specifically, in contrast to the authors cited above, several scholars do not find any positive effect of unemployment benefits on the quality of subsequent jobs or a better transition to employment (Le Barbanchon, 2016; Card et al., 2015; Lalive, 2007; van Ours & Vodopivec, 2000).

In addition, independently from the availability of jobs, escaping unemployment remains difficult for those job seekers who lack the necessary skills and competences. Therefore, in accordance with the traditional social investment perspective, social benefits should be combined with the active labour market policies (ALMP) that include a wide range of measures, ranging from education and training, over job application training, work trial placements, counselling and mediation, to public employment schemes and conversion of benefits into recruitment subsidies. Nevertheless, it should be noted that in the Re-inVEST.be project it is highlighted that not all ALMP are social investments, as some of them reduce individuals' capabilities and constitute a disinvestment (e.g. when precipitation into work does not allow individuals to further enhance or develop skills) (Nicaise, Lewhess-Litzmann et al., 2018). Hence, decent ALMP policies should focus on the provision of high-quality services that focus on sustainable social inclusion (Nicaise, Lewhess-Litzmann, 2018b).

Upon presenting the main perspectives on the effects of policy design on employment, the following paragraph summarises the main academic views on different welfare policies and their effect on poverty reduction.

Different approaches to poverty alleviation

Reducing poverty and associated vulnerabilities is the main purpose of social protection (ILO, 2017). For this reason, it is essential to carefully design social protection schemes in order to achieve results in poverty alleviation. Hence, a significant body of research on the effects of social benefits on poverty has therefore focused on the (possible) differences in outcomes between welfare regimes. For example, according to Polin and Raitano (2014) the social-democratic regime, "assigns the welfare state a large redistributive role and is characterized by generous benefits to guarantee adequate economic resources independent of the market or family support" while the corporative regime puts "less emphasis on redistribution and makes benefit eligibility more dependent on having entered the labour market" (p. 748). These differences might partly explain why some welfare state regimes, using the terminology of Esping-Andersen (1990), reach more individuals and are more effective at combatting poverty than others. The research by Baldini and colleagues (2016) confirms this statement by demonstrating that the probability of receiving cash transfers depends on both individual characteristics and the specific features of different systems of social protection. The authors argue that "the probability of not receiving any benefit when poor is higher for specific groups [young, foreigners, highly educated, and those who live alone]" and "the degree of inclusion or exclusion for each category is different among the European welfare systems" (Baldini et al, 2016, p. 23).

Additional research shows that these differences between welfare systems and social policies also hold for poverty dynamics. Several studies confirm that differences in poverty entry can be partially explained by the welfare regime typologies (Layte & Whelan, 2003; Fouarge & Layte, 2005). For example, Layte and Whelan (2003) indicated that the residents of social-democratic countries are less likely to experience poverty and have lower levels of persistent poverty than the residents of liberal and southern regimes and that "labour income changes are more often associated with poverty transitions in Anglo-Saxon and Southern countries" (p. 749).

Broadly, the current literature on poverty and social investment is generally based on a dichotomy of "new" social investment vis-a-vis "old" social protection (i.e. social transfers to protect against traditional industrial risks) and their role in poverty reduction. The first *social protection perspective* is founded on principles such as conditionality, means testing and progressive reduction of social benefits, as presented in the paragraph above on unemployment. From a traditional social protection standpoint, bringing people into work has been deemed as the best strategy to lift individuals from poverty (Cantillon et al. 2003, Immervoll, 2009), hence highlighting the crucial role played by unemployment protection and labour market policies in the fight against social exclusion. However, opponents of the more traditional social protection paradigms, the above-mentioned "make work pay" and "welfare-to-work", argue that, while these strategies can have positive effects on the reduction of unemployment, the effects on poverty alleviation are often negative (Nicaise & Lehwess-Litzmann, 2018b). In addition, Europe is faced with increasingly high levels of in-work poverty, proving that promoting jobs is not enough for poverty alleviation (Van Lancker, 2012; Bonoli & Natali, 2009), especially for vulnerable categories, for which jobs are often precarious, also due to the increased conditionality and flexibility on the labour market (CPS, 2015).

The alternative perspective, the "new" *social investment paradigm*, builds on the claim for "generous" social transfers, combined with activation policies to invest in capabilities. As a support to the social investment approach, in general, there appears to be ample evidence for the positive correlation between the expenses on social transfers and the reduction in the poverty rate when comparing the situation before and after social transfers (Nolan & Marx, 2012; Caminada et al., 2010). Several studies stress the importance of the generosity of benefits, in other words, the size of the transferred income (Ferrarini, Nelson & Palme, 2016; Kyzyma & Williams, 2017; Whiteford, 2008). At the same time, the ultimate effect of social transfers on poverty may depend on individual and household characteristics (Baldini et al., 2016). Microeconomic research that focuses on these individual- or household-level differences underscores that some groups of the population (in particular, self-employed, migrants, low-skilled workers, families with children) have a higher probability of entering poverty and are less likely to benefit from social transfers (Italy: Addabbo & Baldini, 2000).

Nevertheless, several authors pointed at the move to a social investment state as a possible explanation for the disappointing poverty trends in the past decade (e.g., Morel et al, 2012; Vandenbroucke and Vleminckx, 2011, Van Kersbergen & Hemerijck, 2012; Hemerijck, 2013). According to this view, there are two main explanations for the emerging negative relationship. First, the new active welfare state programmes are less redistributive than the traditional welfare state programmes (Ghysels & Van Lancker, 2011; Cantillon, 2011, Wang et al., 2012). Second, the new social policies tend to focus on activation and 'making work pay' notion and therefore have become less generous (Paetzold & Van Vliet, 2014) while the eligibility conditions have become stricter (Immervoll & Richardson, 2011). In addition, the redistributive effect of the remaining unemployment benefits has declined (Cantillon and Van Lancker, 2011; Wang et al., 2013). In addition, Cantillon and Van Lancker (2013) demonstrate that the shift towards social investment strategies (in narrow definition) has not led to a social progress for every individual considering that not all individuals can enjoy the merits of the social investments.

At the same time, these negative policy effects do not seem to be generalizable across contexts. Van Vliet & Wang (2015) analysed the distributional effects of shifts from traditional welfare state arrangements to social investment policies in 15 European countries (1997-2007). The authors examined the extent of the variation in poverty rates and income inequality levels in their relation to social investment policies. Their results suggest that "the detrimental effect of social investment policies, described in some specific cases in the literature, cannot be generalized across a larger group of European countries" (Van Vliet & Wang, 2015, p. 611). However, the authors also find that "for European countries other than the Nordic countries, the results provide some evidence for a linkage between stagnating or increasing poverty trends and shifts in expenditures to new welfare state programmes" (Van Vliet & Wang, 2015, p. 611)

Other empirical research appears to corroborate these findings by stating that the redistributive effect depends on the specific policy context and the socio-demographic structure of a country (Vaalavuo, 2013). Another strand of research highlighted the relevance of some crucial structural preconditions that must be met for the effects to arise (Kazepov & Ranci, 2017).

The patterns concerning poverty exits are, however, less easy to interpret (Callens & Croux, 2009; Polin & Raitano, 2014). A more "generous" welfare regime will protect individuals from falling into poverty, but this does not necessarily help individuals who are already in poverty to escape it faster (Polin & Raitano, 2014). In addition, recurring to poor targeting and quality ALMP may not always have positive effects on poverty, as pushing people into work may increase their dissatisfaction and lead to higher inactivity rates, with negative consequences on social indicators (Nicaise & Lehwess-Litzmann, 2018b). Instead, poverty exit could be facilitated by increases in social transfers, more effective active labour market policies and a labour market that can employ inactive individuals and unemployed (Polin & Raitano, 2014).

Finally, some authors analysed the effectiveness of generous social policies and social transfers other than unemployment schemes in combatting emerging social risks. For example, Rovny (2014) finds that active labour market policies (ALMPs) appear to be the most important predictor of the reduction of poverty among low skilled, while other analysed social policies only have significant effects for specific groups (e.g. passive labour market policies only for older men, family policies only for low-skilled young women and men, welfare generosity in unemployment, sickness and disability allowances mostly for the older male group). These results suggest that "some social policies remain geared towards older segments of society, leaving the younger population at greater financial and therefore social risk" (Rovny, 2014, p.405). Kyzyma & Williams (2017) applied a similar approach when examining the effect of specific components of total transfer income on individual probabilities of exiting and entering poverty and the total amount of time spent below the poverty line. Their results suggest that these components all have a positive effect on the reduction of poverty but that the effect depends on specific conditions or specific contexts/countries. For example, an increase in the received unemployment benefit results in higher probabilities of exiting poverty, especially when these transfers are combined with the well-developed ALMP. On the other hand, old-age transfers reduce the time spent below the poverty line if "they are generous in size and not progressively distributed along the total income distribution" (Kyzyma & Williams, 2017, p. 485). Family benefits lower the probability of poverty entry in countries that spend larger shares of their GDP on childcare facilities. Lastly, in half of the countries in the study, sickness benefits appear to contribute to shorter periods under the poverty thresholds (Kyzyma & Williams 2017).

Overall, looking at the increasing poverty trends in Europe and acknowledging that the social targets for Europe 2020 will not be met, doubts are raised also on the effects of "generous" social transfers on poverty reduction and social inclusion. Therefore, recently, a *third* and more recent *perspective on social investment* and poverty is emerging, that would consider social protection not in antithesis to social investments, but rather as a complement (Morel et al., 2012). So does Re-inVEST.be, which sees social protection as one of the possible instruments to achieve investments in capabilities. Indeed, as explained in the previous paragraphs, both the old and new welfare states showed some pitfalls in obtaining successful results in poverty alleviation. From this perspective, enhancing social protection appears to be insufficient to improve social outcomes, and additional investments into individuals and households (such as into health, education, housing) seem necessary to fight poverty (Nicaise, Lehwess-Litzmann, 2018b). Building on this argument, poverty does not only depend from a lack of income, as is claimed in more traditional social policy paradigms, but, according to the social investment perspective, it can result from a lack of resources, constraining conversion factors, and/or lack of free choice (i.e. lack of capabilities). Hence, a situation of poverty can translate into a reduction of investment of households in their own resources (e.g. housing, education, health), thus contributing to disinvestment, social exclusion, and deprivation (Bonvin & Laruffa, 2017). Social investment measures can contribute to invest (directly or indirectly) into the capabilities of individuals and households, breaking this vicious circle of disinvestment (Nicaise, 2017).

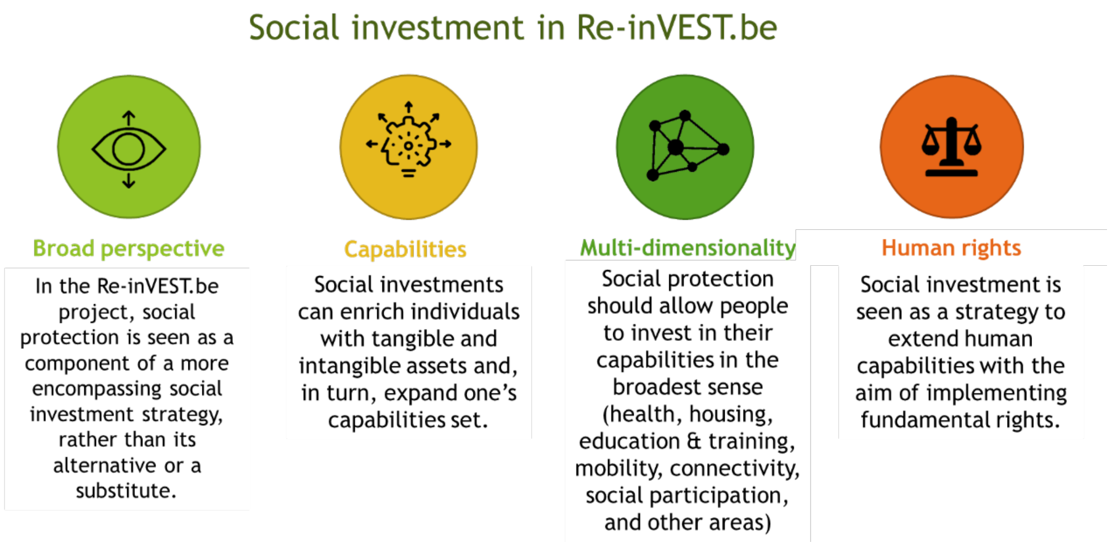
The next section presents a more detailed description of the perspective taken by Re-inVEST.be on the link between social protection and social investment.

Social protection as a social investment and fundamental right

As discussed in the previous paragraphs, the mainstream literature considers social investment policies to be 'new' welfare policies, as opposed to the 'old' social protection policies. In this understanding, social protection policies include cash benefits which provide income compensation for old industrial risks (e.g. cash benefits for families with children, old-age benefits, unemployment benefits) while social investment refers to "investments in services", aimed at enhancing human capital and labour market participation, and addressing the new social risks that have emerged in post-industrial societies" (Ronchi, 2018, p. 464). According to this dichotomy, "new" welfare policies come in bulk with ALMPs, as a mean to invest in people's skills to increase their employability. This is also shown in the Social Investment Package and in different OECD reports that suggest a shift away from PLMP to increasingly develop and implement ALMP and other investments, such as education.

Nevertheless, a more recent view of social investment suggests the presence of a more complex interplay between the concept of social protection and that of social investment. In this interpretation, the two types of welfare strategies are seen as policy complements rather than policy substitutes. For example, as stated by Hemerijck (2013, p.248) "adequate minimum income protection is a critical precondition for an effective social investment strategy" (see also Morel et al., 2012; De Deken 2014; Vandenbroucke & Vanhercke, 2014). In line with this view, many authors argue for a balanced mix of both policy dimensions (e.g. Esping-Andersen et al., 2002; Hemerijck, 2013; Cantillon & Van Lancker, 2013). Similarly, in the Re-inVEST.be project, as summarised in the figure below, social protection is seen as a component of a more encompassing social investment strategy, rather than its alternative or a substitute.

Figure2 Definition of social investment in Re-inVEST.be



Thus RE-inVEST.be provides a new understanding of the role of social protection that has not yet fully permeated the EU's social policy discourse.

In brief, for this emerging perspective, social investment is seen as a "strategy to extend human capabilities with the aim of implementing fundamental rights" (Nicaise, Lehwess-Litzmann, 2018, p.13).

In this framework, considering that access to social protection is a human right and fundamental freedom (e.g. Art. 22 of the Universal Declaration of Human Rights; Art. 34 of Charter of Fundamental Rights of the European Union), and further developed in the European Pillar of Social Rights[6], the right to social protection translates into the entitlement, for European citizens, to social security benefits and services with the aim of protecting them from unemployment, social exclusion, illness and accidents, disability, but also of providing safeguards in case of maternity, childcare and old age[7].

6 Such as the right to work, social security, decent working conditions and protection from unemployment.

7 More information on social protection in Europe can be found online on the website of the European Commission at: https://ec.europa.eu/info/aid-development-cooperation-fundamental-rights/your-rights-eu/know-your-rights/solidarity/social-security-and-social-assistance_en#:~:text=Know%20your%20rights,-The%20Union%20recognises&text=Furthermore%2C%20everyone%20residing%20and%20moving,and%20national%20laws%20and%20practices.&text=This%20right%20is%20enshrined%20in,the%20Charter%20of%20Fundamental%20Rights.

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Re-InVEST.be - Rebuilding an Inclusive, Value-based Europe of Solidarity and Trust through Social Investments

The purpose of Re-InVEST.be is to re-frame the main federal anti-poverty policies and instruments from a remedial into a proactive mode – from a 'survival' to a sustainable and inclusive perspective, and to uncover open and hidden discrimination processes that risk 'locking in' some population groups into persistent poverty. Social inclusion is re-examined from an innovative, social investment perspective, with a particular focus on the interactions between social protection, housing and health

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