

## FISS 2023 ABSTRACTS LIST

### **SESSION 1: UNDERSTANDING NEEDS**

#### **CLOSER TO CONSENSUS? COMPARING SOCIALLY PERCEIVED NECESSITIES IN JAPAN OVER 20 YEARS**

Aya Abe

*Tokyo Metropolitan University*

Measuring material deprivation using a list of socially perceived necessities (Mack & Lansley 1985) is becoming increasingly common all over the world. As opposed to income-based poverty measures which only capture resources available to sustain certain living standards, the material deprivation index directly measures the level of living standard and thus performs better in identifying the poor. It also has added advantages such as being able to measure individual, not household, living standard, and being fairly reliable and with fewer missing answers in surveys. Even in Japan, some material deprivation items were selected as part of official child poverty indices which the government specified in 2019. However, one of the problems that Japan faced in using material deprivation index is that the social perception of what is necessary was very low compared to the Western countries. Thus, only a handful of items met the criteria of receiving support from the majority of the population. Another problem is the social consensus. The validity of deprivation index rests on the assumption that each item on the list has social consensus regarding its necessity (Pantazis et al. 2006), yet the consensus in Japan was weak in some respects.

However, in the past decade, there was a significant advancement in policies at least in child poverty. The media coverage of poverty also skyrocketed since 2009-10 and child poverty continues to be a hot topic in 2020s. Such social change could spur higher support and tighter consensus among the public on socially perceived necessities. This presentation uses 5 necessity surveys over the period of 2003 to 2022 to examine if and how socially perceived necessities changed over time in Japan.

---

#### **THE CASE FOR PER CAPITA REBATES: COUNTING CHILDREN AS FULL PEOPLE**

Sophie Collyer, David Harris, Jiwan Lee and Christopher Wimer

*Columbia University Center on Poverty and Social Policy*

The arrival of the COVID-19 pandemic was accompanied by a flurry of legislative activity in response to both the health and economic fallout. Among the more prominent policies passed were Economic Impact Payments (EIPs) – flat dollar amounts available to all but the wealthiest households. Critically, unlike previous cash payments, the payments were fully refundable, meaning that people with little or no earnings were eligible for the full benefit. By 2021, congress ultimately passed three rounds of EIPs. The first round provided \$1,200 per adult and \$500 per child. As such, a parent with two children received a

smaller benefit than a childless couple. The subsequent two rounds of EIPs provided the same full benefit to children as adults.

While the EIPs created in response to the COVID pandemic may be considered “one offs”, direct payments are a regular policy that arises regularly in federal and state policy as well as in policy proposals. Indeed, with varied purposes and names including EIPs, stimulus payments, dividends, and rebates, flat cash payments are a regular policy concern.

There are numerous design issues to consider when creating rebates. From the standpoint of low-income individuals, full refundability would be the most important, as it is the only way to ensure that those with no or low incomes are eligible for the full benefit.

In this brief we examine rebates from the standpoint of children. Often overlooked, their inclusion in these policies can dramatically improve a lot of our nation’s poorest children. We examine the impacts of EIP round 2 and 3 on child poverty and then model what the impact would be if children were not included, or if they only received half payments as originally proposed – and in so doing, make the case for counting children as full people when creating flat payments policies.

---

**SIMILAR HOUSEHOLDS ARE NOT ALIKE. WHY A BETTER MEASUREMENT OF FAMILY DIVERSITY WITHIN HOUSEHOLDS MATTERS FOR OUR UNDERSTANDING OF POVERTY RISKS ACROSS EUROPEAN COUNTRIES**

Wim Van Lancker, Lovisa Backman, Alzbeta Bartova, Rense Nieuwenhuis and Max Thaning

*Centre for Sociological Research, KU Leuven*

An abundant amount of literature has focused on the measurement and prevalence of poverty, the persistency and consequences of being poor, characteristics of poor individuals, and the role of welfare state institution in reducing poverty within and across countries. In the majority of these studies, the key assumption is that the household is the relevant unit to measure poverty. Hence all individuals within a household are considered poor, irrespective of whether income-based or material deprivation measures are being used. Drawing on insights from the rEUsilience project, in this paper we propose that such household perspective obfuscates our understanding of poverty risks, and that a family perspective in which individual, household and families are distinguished brings much more analytical clarity.

Studying families with social survey data is not always straightforward as it may seem due to conceptual and methodological reasons, in particular with respect to disentangling families and households. Not only is the definition of family fluid and context-dependent, in surveys usually (individuals living in) households are sampled. Families can be defined as networks of at least two people who are connected through birth, marriage, adoption, or choice. A crucial aspect is then that a family can extend beyond any particular household and several families can potentially live in the same household. Households, on the other hand, are collections of people who share the same dwelling. Households are generally classified into non-family and family households. Non-family households are those that contain a single individual or a collection of people who are not connected by marriage, birth, adoption, or choice. In contrast, family households are those where at least two people fulfil the definition of a family unit. Households may

contain one or more family units but also a family unit that shares the space with individuals without any family relation to this family unit. At the same time, a non-family household doesn't necessarily mean an absence of familial relations. Despite living alone, a person may be a part of a broader family network spanning through several households and may benefit from these relations.

In this paper we demonstrate the impact of highlighting family relations within household types in Europe on our understanding of poverty risk, drawing on different cross-country comparative datasets. We empirically show whether it matters to focus on families within households, and to what extent it provides a more fine-grained insight into the role of family composition to shelter households from being poor. One obvious example is single parent households. Previous research clearly established that they run a great risk of being poor across European countries. However, it matters for poverty whether single parents are living alone, in a multigenerational household or share a dwelling with other non-related adults. These different configurations interact with policies in different ways across different social and economic contexts.

---

## **SESSION 2: UNIVERSAL BASIC INCOME**

### **THE INDIVIDUAL NATURE OF UNIVERSAL BASIC INCOME: DISCRIMINATORY AGAINST THOSE WHO LIVE ALONE?**

Elise Aerts, Ive Marx and Gerlinde Verbist

*Centre for Social Policy Herman Deleeck, University of Antwerp*

Advocates of gender equality have pushed for rights that are independent of marital status or household context. A basic income is of course a prime example. There are very legitimate grounds for such a choice but we need to be fully aware that there is a price to be paid. Social rights can be individualized, but poverty remains a household concept. Along that line, we argue that BI is not a neutral reform: it puts singles and single parents at a relative disadvantage compared to larger families. Using the microsimulation model EUROMOD for the Netherlands, we simulate a typical UBI proposal: a full, individual basic income set at the same level as guaranteed minimum income (GMI). Many existing UBI studies only discuss the distributional effects on aggregate, but this can mask significant losses for certain households. We go beyond this by determining the proportions of households gaining/losing across different demographic groups and breaking poverty down by family type.

Our analysis reveals three concerns. First of all, the individual as the beneficiary unit does not accurately reflect the empirical fact that there are economies of scale. An individual-based basic income scheme will accordingly favour large households. Second, similar benefit for all ignores the empirical fact that households have differing circumstances (i.e. abilities and/or barriers to opportunities). That way, a basic income will make it even more difficult for single-adult households to keep up in pace with the living standards in a society where the majority of families rely on two incomes. And because single parenthood predominantly is a circumstance experienced by women, there will also be a gender effect (almost 80% of single parents are headed by the mother in the Netherlands). Accordingly, we find that just over half

of male-headed households would gain from a UBI, whereas for female-headed households less than half of households gain. This strikes an important blow against basic income's gender-egalitarian credentials.

While a basic income may have the potential to reduce poverty and inequality, it may also have unintended consequences for singles and single parents in society. The choice for purely individualized rights is legitimate but it is in distributional terms one with far-reaching implications. For the principle of individual rights sits fundamentally uneasily with the empirical realities of household economics. As such, policymakers should carefully consider the desirability of a fully individualized system such as a UBI before implementation, especially in a country that has a strong precedent of household-level and targeted measures.

---

### **EFFECTS OF BASIC INCOME EXPERIMENT ON UNION FORMATION AND DISSOLUTION: A REGISTER-BASED ANALYSIS**

Henri Salokangas, Outi Sirniö, Pasi Moisio and Heikki Hiilamo

*Finnish Institute for Health and Welfare (THL)*

We analyze whether receiving basic income in a nationwide Finnish randomized experiment (2017-2018) affected union formation and dissolution propensities. Previous guaranteed income experiments in North America led to a debate of their negative impact on marital outcomes. This question has not yet been tested in a Nordic welfare state. Analyzing receipt of basic income enables assessing whether changes in financial situation and participating in an experiment affect union transitions.

We use register-based data covering both cohabiting and married couples with detailed information on union formation and dissolution histories. Our data include all basic income recipients (N=2,000) along with their control group (N=173,000). We employed Cox regression models across different population subgroups.

Receiving basic income did not have a considerable impact on union formation or dissolution in both genders. The effect was not detectable during the experiment or in an extended follow-up ending two years after the experiment. Among rural residents and foreign-born individuals, we found basic income increasing union stability.

Temporarily enhanced financial stability due to basic income does not have substantial long-lasting effects on union dynamics. Arguments for or against basic income, or similar policy schemes, can leave family dynamics aside in countries with an adequate minimum income scheme.

---

### **HOW WOULD PEOPLE EXERCISE THEIR 'REAL FREEDOM'? A VIGNETTE EXPERIMENT ON BASIC INCOME**

Cyrille Francisco, Adeline Otto and Wim Van Lancker

*Centre for Sociological Research, KU Leuven*

The concern about a work disincentive effect of a Basic Income (BI) has led many studies to analyse this issue. Unfortunately, this has left other behavioural effects understudied. However, learning more about what activities BI recipients would engage in would not only give us an idea of its potential socioeconomic

implications. It also provides insight into how far and by whom the 'real freedom' that a BI is often claimed to deliver might actually be used. Against this background, we use data from a vignette experiment among 3,000 survey respondents in Belgium. Our results suggest that people's behavioural intention is not limited to working or not working and that most of the respondents aiming to reduce paid work would combine it with other economic or social activities. However, these intentions are socially structured. Additionally, we show that variation in BI design has an effect on the behavioural intention beyond the labour supply impact evidenced in previous studies.

---

## **SESSION 3: BARRIERS OF ACCESS TO SOCIAL RIGHTS**

### **THE SIZE, CHARACTERISTICS AND DETERMINANTS OF NON-TAKE-UP OF SOCIAL BENEFITS IN BELGIUM**

Julie Janssens, *University of Antwerp*

Tim Goedemé, *University of Antwerp*

Manon Bolland, *Université de Liège*

Social benefits targeted at the poor are an important part of modern welfare states. These benefits serve as a final safety net for those for whom traditional protection arrangements fall short. Unfortunately, many of those in a very vulnerable situation do not take up the social benefits they are entitled to and slip through the cracks in the net. In Belgium, as well as in other countries, the issue of non-take-up has received attention from researchers, policy makers, and public agencies concerned with poverty, social exclusion and well-being. However, in spite of this interest, and increased efforts to study and tackle the phenomenon of non-take-up, important gaps in our knowledge of non-take-up in Belgium remain with regard to the quantification of the problem, its causes and its impacts.

The TAKE project, which ran from February 2016 until December 2022, and was funded by the FPP Belgian Science Policy (Belspo), was set up to contribute to filling this gap. The main objective of the TAKE project was to study the size, characteristics and determinants of non-take up of policy measures targeted at vulnerable groups in Belgium. In addition, the project evaluated the impact of several policy initiatives aimed at reducing non-take-up. For doing so, the project built on the latest theoretical insights, analysed existing administrative and survey data, collected new data through surveys, in-depth interviews and focus groups, and made use of both microsimulation techniques and a large-scale field experiment. In this presentation, we summarize the key findings of the TAKE project and formulate some recommendations to guide policymakers and administrations in making further progress in addressing the non-take-up of social benefits in Belgium and elsewhere.

---

## **UNLOCKING ACCESS: OVERCOMING BARRIERS TO SOCIAL SERVICES**

Lukas Kerschbaumer, Sascha Gell and Pia Reichmann

*Center for Social & Health Innovation*

The COVID-19 pandemic had significant impact on the functioning of welfare states, with governments implementing various social support measures to mitigate the effects of the crisis on citizens while complying with budgetary constraints. The Rawlsian theory of justice emphasizes that redistributive measures should primarily benefit the least advantaged members of society. However, take-up rates for these benefits vary widely across Europe, ranging from 20-70% (depending on the type of benefit). This is partly due to bureaucratic barriers, information deficits, and restrictive eligibility criteria, which impede access to benefits for those who need them the most.

Tyrol was hit hard by the pandemic, as it is heavily dependent on tourism and long-term unemployment rates nearly doubled between September 2019 and 2021 followed by high inflation in 2022. Therefore, it was and is of utmost importance to look at the enabling or constraining factors of uptake of social benefits by vulnerable groups in Tyrol as they can make the difference between poverty experiences or resilience.

A total of 143 interviews with people experiencing poverty or living in precarious circumstances, people with disabilities and their families, and 36 interviews with street level bureaucrats were conducted. Gatekeepers and snowball sampling were used to reach participants and a compensation of 50 euros was paid. The data was analysed using qualitative content analysis and biographical reconstruction to provide insights into the contexts and conditions that facilitate poverty and precarious living conditions.

Case reconstructions reveal a lack of awareness and understanding of support options, complicated application processes and fragmentation of the social landscape leading to inefficient use of resources. Digitalization was introduced as boon and bane at the same time. This highlights the need for creative solutions to improve the effectiveness of social welfare systems through simplifying the application process, increasing awareness and better coordination of resources.

---

## **BALANCING AUTOMATION AND DISCRETION IN SOCIAL POLICY: A CASE STUDY IN BELGIUM**

Wim Van Lancker, Koen Hermans, Marjolijn De Wilde and Janne Petroons

*Centre for Sociological Research, KU Leuven*

With the rise of AI and automation, it is expected that many public tasks will be automated in the future. In contrast to rather administrative services, social policy and social work are considered more difficult to automate, as these fields demand individually tailored implementation. This article adds empirical arguments to this discussion, describing the level of automation that is already present in a social policy context.

We collected qualitative data through interviews with 16 employees (amongst them social workers, administrative staff and management) in four public social welfare centers in Flanders. We found automation is present in all four of Parasuraman's stages of automated decision making, namely 1)

information acquisition 2) information analysis 3) action selection and decision, and 4) action implementation.

Examples include generating social reports based on personal administrative data, calculation tools deciding on the amount of the financial aid that is granted, classifying applications as “administrative procedures” meaning further checks by human decision makers are skipped and motivating decisions to clients using standardized codes.

This contribution is part of a larger scale project on automation in the realm of social assistance in Belgium. We will present the set-up and context of the project, present early results based on interviews with social professionals, and interpret this in light of ongoing, international debates on how social professionals manage to balance automated decision-making and discretion in the public welfare sector.

---

### **EXAMINING DISCRETION IN ORGANISATIONAL RULES: THE CASE OF A FINNISH LAST-RESORT SAFETY NET**

Amanda Tuomola, *University of Turku*  
Paula Saikkonen, *Finnish Institute for Health and Welfare (THL)*

Discretion is an essential element of a social security last-resort safety net. Discretion enables acknowledging the individual life situations of recipients in the decision-making. Yet the role of discretion and the extent to which discretion is steered in the organisational rules is still ambiguous. Our article explores the evolution of discretion in social assistance. Our case country is Finland. The reform in 2017 centralised the implementation of social assistance from local municipalities to the national institution. The reform was meant to be administrative although it was stated to unify the implementation and advance equality between recipients nationally. We formulated an analytical framework based on previous literature that combined the top-down and bottom-up theoretical views on discretion illustrating the starting point to study discretion.

We ask what kind of discretion can be identified in the last-resort safety net and how organisational rules reformulated discretion in the Finnish system. Discretion is analysed with document data related to Finnish social assistance and group interview data from social service recipients during the COVID-19 epidemic. At first, we analysed the documents with data-driven qualitative content analysis and then we approached the coded data with the analytical framework.

The analytical framework worked as a tool to recognise discretion in the organisational rules in the document analysis. The results show that discretion can have many forms in the rules. During the epidemic, the implementation was simplified, and discretion was reduced. After the epidemic, discretion is steered more precisely but it cannot be traced to the temporary practices during the epidemic. Instead, the evolution of discretion could indicate the aim of steering discretion in order to better acknowledge recipients’ individual situations in the organisational rules. The results indicate that it is difficult to simultaneously steer discretion uniformly in organisational rules but still enable acknowledging individual situations.

---

## **SESSION 4: POVERTY AND INEQUALITY**

### **DEMOGRAPHIC COMPOSITION AND INCOME INEQUALITY IN BELGIUM: 1985-2021**

Ella-Marie Assal, Koen Decancq, Sarah Kuypers and Gerlinde Verbist

*Centre for Social Policy Herman Deleeck, University of Antwerp*

Remarkably, income inequality in Belgium seems to have remained fairly stable since the 1980s, despite rising income inequality in many other countries. This study aims to explore the role of demographic composition in explaining this quite unique trend. Using a harmonized microdataset spanning from 1985 to 2021, we employ a semiparametric reweighting technique to analyze the impact of changes in the demographic composition on income inequality.

Our analysis focuses on some key demographic factors: population aging, changes in family structure, increased migration, and educational attainment. These variables have undergone significant transformations during the study period, including a considerable increase in the average age of the population, a shift towards smaller families with fewer children and more single-person or single-parent households, a rise in the share of migrants, and an overall increase in educational levels.

Although these major demographic shifts are undeniable, the extent to which these demographic changes have influenced income inequality in Belgium remained uncertain. By employing a counterfactual distribution approach, we are able to disentangle the effects of a changing demographic composition from other potential determinants of income inequality.

---

### **SOCIAL SUSTAINABILITY IN THE DECARBONIZED WELFARE STATE: SOCIAL POLICY AS A BUFFER AGAINST POVERTY RELATED TO ENVIRONMENTAL TAXES**

Kenneth Nelson, *University of Oxford and Stockholm University*

Arvid Lindh, *Stockholm University*

Par Dahlen, *Stockholm University*

Politics and policy involving environmental protection and sustainable development are more topical than ever. Although the regressive profile of environmental taxes has been debated for decades, the role of the welfare state in buffering adverse distributive effects of climate policy is largely unknown. The purpose of this study is to analyze if social policy shields people from falling into poverty because of environmental taxes on household consumption. Focus is on the degree of income replacement in major social insurance schemes. To facilitate detailed analyses of the distributive outcomes of environmental policy, we impute environmental taxes into the European Union Statistics on Income and Living Conditions (EU-SILC) based on information from the European Household Budget Surveys (HBS). Our comparative analysis of 26 countries shows that higher degrees of income replacement in social insurance reduces the probability that environmental taxes push people into relative income poverty. We also find that higher income replacement in social insurance mitigates the educational gradient in poverty associated with environmental taxes. Social policy thus seems to play a role in protecting people against adverse distributive outcomes in the transition towards net zero carbon emission societies.



## POLICY INTERPLAYS ROOTED IN METHODOLOGICAL INDIVIDUALISM

Rense Nieuwenhuis

*Swedish Institute for Social Research (SOFI), Stockholm University*

The study of policy interplay has regained interest in the field of comparative welfare state research. Whereas early comparative analyses of the welfare state were often based on typologies to (attempt to) capture the complexity of multiple social policies comprising the welfare state as a whole, the last decennia have seen increasingly advanced methodologies to examine the impact of single policies (or even aspects of policies) in isolation. Although the study of social policies in isolation has undoubtedly brought important insights, more recently there is increased attention to the potential interplays between various social policies.

The fact that the study of policy interplay is, in some ways, in its infancy may be best illustrated by the fact that conclusions have differed based on the approach taken, in particular with respect to using macro-level (Nieuwenhuis, 2022) or micro-level data (Plavgo, 2023). The aim of this study is to develop an approach that integrates macro- and micro-level analyses of policy interplay. This approach to analysing policy interplay is rooted in methodological individualism, analysing the actions (or states) of individuals in the macro-level context shaped by multiple policies.

Doing so, the theoretical model highlights a number of different ways in which the interplay between policies can take place. The effectiveness of one policy can be altered by another policy in 3 distinct ways: policy A can alter the demand, the take-up, and/or the effectiveness of policy B. Each of these pathways can be analytically distinguished, and would come with rather different policy implications.

Although the main aim is to make a theoretical contribution, the resulting model is tested using micro-data from the Luxembourg Income Study (LIS, 4,864,670 individuals, from 18 OECD countries, 1984 – 2016). These data are combined with macro-level policy indicators on unemployment benefits (CWED) and ECEC (OECD expenditure) to see their potential in reducing at-risk-of-poverty. Doing so, the results highlight different forms of policy interplay between ECEC and unemployment benefits. These forms are labelled as:

- **Pluralism:** Unemployment benefits and ECEC as both associated with lower poverty, yet among groups that only partially overlap
  - **Complementarity:** ECEC increases the take-up of unemployment benefits (because of a larger work force and better work histories) and make unemployment benefits more strongly associated with lower poverty (because of better work histories)
  - **Substitution:** higher replacement rates in unemployment benefits are associated with higher take-up of unemployment benefits, but less so in the context of high expenditure on ECEC (and vice versa). Moreover, the moral hazard associated with high unemployment benefits being associated with lower unemployment only occurs in the context of low expenditure on ECEC.
-

## **CAN EARNED INCOME TAX CREDITS REDUCE POVERTY?**

Daniel Fredriksson

*Swedish Institute for Social Research (SOFI), Stockholm University*

This study investigates whether earned income tax credits (EITCs) can reduce poverty. EITCs are tax instruments that promote income from work over income from the welfare state, and combine two objectives: 1) reducing poverty, 2) increasing work-incentives. Although the implementation of EITCs has become more widespread over the past twenty years, the emphasis on these two objectives vary by country. Sweden, for example, introduced an EITC in 2007 with the explicit aim to increase work-incentives, whereas, for example, the long-running EITC in the United States can be said to mostly have emphasised poverty reduction. However, despite an increase in employment in many Western countries, poverty has increased or at best remained stable. This indicates a possible trade-off between employment and poverty alleviation when utilizing EITCs, and it is unclear whether the two objectives of EITCs can be complementary.

Any effects on poverty (or employment) are likely to depend on how EITCs are organized. They may, for example, target only low-income households, or differ with respect to the amount of the credit, but also how they relate to other parts of the welfare state, such as minimum wages and out-of-work benefits. However, due to the lack of comparative measures, we have limited knowledge on the effects of EITCs beyond a handful of countries, and virtually no research on how they interrelate with other policies.

This study aims to address that deficit by using newly constructed indicators on the targeting and generosity of EITCs, which have been created using the OECD TaxBEN platform, which includes roughly 40 countries. During the period covered in this study 2001-2022, at least 20 OECD countries have or have had some form of EITC in place. The indicators are used in a multilevel framework in conjunction with harmonized microdata on earnings and income from the Luxembourg Income Study and EU-SILC in order to assess the relationship between poverty and EITCs and particularly if the relationship is moderated by how EITCs are structured in terms of targeting and generosity.

---

## **SESSION 5: PENSIONS SYSTEMS**

### **DESIGNING A FAIR AND FINANCIALLY SUSTAINABLE UNIVERSAL PENSION SYSTEM FOR ALL OF CHINA**

Edward Palmer, Peng Zhan and Xinmei Wang

*Uppsala University, Sweden*

Supported by strong economic growth, China's public pension coverage has developed rapidly over the past few decades. By 2022, 91% of the population aged 16+ was covered either by the Earnings-related Pension Scheme (EP, 503 million persons) or the Social Pension Scheme (SP, 550 million persons). Despite this enormous progress, there remain many economic and demographic challenges.

To begin with, average unisex life expectancy at age 65 is projected to increase from 16.2 years in 2020 to 24.2 years by year 2100. And the present pension ages of 50/55 for women and 60 for men in the EP scheme are at present misaligned as unisex life expectancy at age 65 is already 16.2 years and is projected by the UN to increase to 24.2 years in 2020.

With a stable fertility rate of 1.7-1.8 children per female going into the future the UN projects that the Chinese population age 25-64 will decline from 840 million in 2020 to 475 million in 2100. A decline that will not be counterbalanced by net immigration. A logical remedy is to steadily increase the retirement age. Today 75% of the EP (“urban”) population retire at the minimum ages of 50/55 for women and 60 for men – whereas 75% of SP (“rural”) workers are still active at age 70.

The question addressed in our study is: Given a high economic growth rate for several decades to come, can the SP and EP working-age population be covered by a single Non-financial Defined Contribution (NDC) earnings-based pension scheme? One that provides adequate, financially sustainable pensions in line with increasing longevity, while buffered by a government budget-financed means-based minimum pension attainable at an increasing minimum pension age? Our empirical examination of a range of scenarios shows that the answer is yes – and here we examine how it works.

---

## **MAJOR CHANGES IN CHINESE PUBLIC PENSION SCHEMES AND ITS UNDERLYING PHILOSOPHIES**

Xinmei Wang

*Zhejiang University*

China’s public pension schemes started in 1950s, which were close to an earnings-related pension (EP) schemes, only covering the public sectors and publicly owned enterprises under a planning economic regime. In 1997, towards a market economy, when China adopted the new pension model according to the World Bank’s approach, the coverage rate was only 12% over the total population aged 16+. While in the end of 2022, 91% has been covered by either the EP scheme or social pension (SP) scheme. The latter was launched in 2009, making up about 52% of the total participants of public pensions. Now China has owned every pillar in the World Bank’s model, and has realized full coverage, but leave the adequate and sustainability issues of public pensions being far from international norms in many aspects.

Despite the global reversal of the World Bank’s approach since 2008, however, for China, it is still controversial whether the World Bank’s approach should be proceeded further. This paper will provide the current state of architecture, model design, main characteristics in an international comparison. For example, too high inequality of benefit distribution and too low benefit level of SP, too high floor and ceiling of contribution bases, too low pension ages, and too low annuity factors, and so on. Furthermore, we explain the major changes in Chinese public pension schemes and its underlying philosophies, particularly explore why China decided to use the World Bank model in 1997 and has been very difficult to get rid of it up to date.

---

## **FLEXIBLE PARTIAL PENSION – A BRIDGE TO FULL-TIME RETIREMENT, WAY OUT OF EMPLOYMENT OR AN INCOME SUPPLEMENT?**

Ilari Ilmakunnas and Susanna Sten-Gahmberg

*The Finnish Centre for Pensions*

Many countries have increased their normal retirement age. Simultaneously countries have often introduced or extended individual options for flexible retirement with the aim of prolonging working life. In 2017, Finland adopted flexible partial old-age pension. This means that either 25 or 50 percent of the old-age pension can be withdrawn after the age of 61. Take-up of flexible partial old-age pension will permanently reduce the future old-age pension. The partial old-age pension is not conditional on (reducing) employment. It can be withdrawn while remaining in a full-time job, while being unemployed, or while exiting the labor force without other sources of income. However, there is no previous research examining to what extent the partial old-age pension works as a route to exit from the labour force or as a way to increase the level of late-career income, instead of bridging the transition into retirement (i.e., part-time work in preparation for full retirement).

Using high-quality Finnish register data with monthly information on retirement and earnings, this study analyzes earnings trajectories after the take-up of the partial old-age pension for individuals that were employed. In addition, we use information on unemployment and sickness allowance spells to analyze to what extent benefit reciprocity is supplemented by partial old-age pension. The study uses growth mixture models for illustrating earnings trajectories and analyzing their predictors.

The findings highlight that the proportion of those reducing their working hours is considerable, but nevertheless lower than expected considering the objectives of the pension scheme. Many previously employed individuals receive partial old-age pension despite not working anymore. Typically, this is not related to unemployment or sickness. A substantial share withdraw partial old-age pension while continuing in full-time work. The results indicate that partial old-age pension provides flexibility, but it is unclear whether it leads to prolonged careers.

---

## **THE EARLY RETIREMENT PRACTICE IN TÜRKIYE AND THE RESPONSES OF YOUNG GENERATIONS THE QUALITATIVE RESEARCH IN TERMS OF THE INTERGENERATIONAL SOLIDARITY**

Hasan Aslan, *Bartın University*  
Oğuz Karadeniz, *Pamukkale University*

Until the first pension reform came into effect in Türkiye (08th September 1999), women were entitled to an old-age pension at the age of 38 and men at the age of 43. With the first reform pension reform, the age requirement was increased to 58 for women and 60 for men in order to be entitled to an old-age pension. Those who entered the job before the reform were organized first on social media (2008) and then by establishing an association. The community in question, which calls itself "those hindered from retirement due to age" (in Turkish abbreviation EYT), has become a huge vote potential for the elections. Before the 2023 elections the government abolished the age requirement for those who were employed before 08th September 1999, with the law enacted.

The aim of the study is to examine the reactions of the young generation to the early retirement law through the comments on [www.eksisozluk.com](http://www.eksisozluk.com) in terms of the intergenerational solidarity. Eksisozluk is Türkiye's oldest (1999) social media and encyclopedia, the 4th largest encyclopedia and dictionary in the world. More than 80% of the users of the platform in question are under the age of 45. In the study, there are 102 titles and 6583 comments about those who are old at retirement (early retirement application), which were opened just after the announcement of the abolition of the age requirement in retirement. Among the comments made on the aforementioned titles, the most liked 400 comments were examined. 71% of the comments are against the early retirement law.

The working age population in Türkiye see as the only way for individuals to access social security benefits. It is thought that the main problem is the basic income insecurity covering all age groups.

---

## **SESSION 6: POLICY RESPONSES TO THE COVID 19-CRISIS**

### **IS THE BELGIAN SOCIAL SECURITY SYSTEM PANDEMIC-PROOF? A LONGITUDINAL ANALYSIS OF REGISTER DATA ON WHO FALLS THROUGH THE SAFETY NET**

Bram Audenaert, Joanna Geerts, Julie Vinck and Wim Van Lancker

*Centre for Sociological Research, KU Leuven*

The COVID19-pandemic and the accompanying measures taken to slow down the spread of the virus caused a serious reduction of economic activities. To cushion this economic shock, policy makers introduced a broad range of measures and benefits. First results show that these measures were quite successful in their purpose. However, past studies can only conclude that the policies worked for most of the individuals in our society, but it remains unknown if it worked for everyone. This paper will investigate which groups were not able to use the Belgian social security system and fell through the safety net. We contribute to the literature by making use of a unique matching of administrative data from the Crossroads Bank for Social Security. This data allows us to follow the complete Belgian population over the first two years of the pandemic. Because of the fact that information on the complete Belgian population is available, small, but mostly vulnerable groups can be investigated. Individuals that disappear completely from the data can be seen as those falling through the safety net and being under protected. First descriptive results show that 2,5% of the Belgian population is under protected for at least one trimester in 2020. Within this group we see that more women, single parents and individuals born outside of Belgium are overrepresented. This is also true for blue collar workers and individuals working in small businesses. Results of this study will help improve our social security system for future economic shocks such as the COVID19-pandemic.

---

## **THE NEW POOR IN GEORGIA: AN EX-POST ANALYSIS OF THE IMPACTS OF COVID-19 ON POVERTY**

Alessandro Carraro and Gwyther Rees

*UNICEF Innocenti – Global Office of Research and Foresight*

Non-pharmaceutical interventions (NPI) such as social distancing, business and school closures have been introduced worldwide to prevent the spread of COVID-19. In Georgia NPIs affected children's lives, contributing to the emergence of new categories of poor, but in-depth empirical understanding on which categories of people have most suffered the shock is still limited.

By relying on Georgia Integrated Household Survey (HIS) for 2017–2021 we traced the differentiated impacts of NPIs throughout the start of the pandemic in the first two quarters of 2020. Households with children have been hit harder and although an economic rebound started to happen in the last quarters of 2020 our trend analysis suggested that these effects may last longer than the pandemic. The NPIs reshaped the characteristics of poverty, exacerbating gender and area inequalities and placing greatest burden on households with children especially in rural areas, with larger impacts for those relying on self-employment.

---

## **HETEROGENEOUS SAFETY NET RESPONSES TO A SHARP EMPLOYMENT SHOCK: EVIDENCE FROM THE COVID-19 ECONOMIC CRISIS**

Michihito Ando, Masato Furuichi and Hayato Kanayama

*Rikkyo University*

This paper examines how different safety net programs respond to a massive employment shock in different ways. More concretely, we investigate changes in the number of Unemployment Insurance (UI) benefit recipients and Public Assistance (PA) recipient households before and after the COVID-19 economic shock, using interrupted time-series (ITS) analysis with monthly-level national administrative data from 2017 to 2021 in Japan.

Our empirical findings are summarized as follows. First, the number of UI-benefit recipients discontinuously increased in May 2020, the outset month of the COVID-19 employment shock, and then gradually decreased. This implies that the UI system quickly responded to the early-stage COVID-19 employment shocks. Second, the number of PA recipient households in the subgroup of working-age healthy householders decreased before the COVID-19 crisis, and it modestly increased in May 2020 and continued to increase afterward. In other words, the number of households receiving PA shows a "kink", rather than a "jump" at the onset of the COVID-19 economic crisis.

We interpret these heterogeneous benefit-increase patterns as reflecting different counter-cyclical responses of these two safety-net systems to a large employment shock. The UI benefits are entitled to the unemployed who are insured in the UI program and benefits are realized soon after entitled workers lose their jobs. The PA benefits, in turn, are entitled to low-income households who pass strict means-testing and households need to be "poor enough" to be entitled to receive the "last-resort" PA benefits.

Thus there exists some time lag for low-income working-age people from being unemployed to being PA recipients, resulting in a gradual, not abrupt, increase in the PA benefits during the COVID-19 crisis.

---

**CHALLENGES EXPERIENCED BY THE NURSING HOMES AND THEIR COPING STRATEGIES DURING  
COVID-19 IN CHINA: POLICY IMPLICATIONS FOR THE ERA OF THE POST-PANDEMIC**

Shiyu Lu and Wing-Kit Chan

*City University of Hong Kong*

The COVID-19 pandemic posed unprecedented challenges to older adults, particularly those residing in nursing homes. However, more research is needed on the challenges nursing homes faced and their coping strategies at both individual and organizational levels. This study explored how nursing homes demonstrated individual and organizational resilience in response to COVID-19 challenges. We visited 12 nursing homes in Southeast China between February and March 2023. We conducted 12 in-depth interviews with managers and ten focus group interviews with 24 staff members (e.g., nurses, social workers, and care workers) in nursing homes. Thematic analysis was used to analyze the data. Our findings revealed that nursing homes faced multidimensional challenges during the pandemic, including the risk of infection, deteriorating mental and cognitive health, loneliness, and inadequate access to healthcare and social care among elderly residents, as well as heavy workloads and substantial stress for staff members. At the organizational level, nursing homes faced financial instability due to low occupancy rates, high staff turnover rates, and difficulty in recruiting care workers. Coping strategies included simplification of services, restructuring of human resources, which led to the mismatch between the jobs and skillsets, and the use of technology to maintain social contact between residents and their families. Success factors included preparedness and planning, strong personal and organizational networks to obtain critical medical resources, and a humanistic organizational culture that fostered team solidarity. Our study discussed the important policy learning and implications for improving the organizational resilience and quality of care for older adults in nursing homes in the post-pandemic era.

---

**SESSION 7: EMPLOYMENT AND POVERTY**

**THE SOCIAL ECONOMY IN FLANDERS: WHAT DOES IT DO FOR POVERTY?**

Hannes Lenaerts, Wouter Neelen, Marie-Laure Mulayi, Wim Van Lancker, Bea Cantillon

*Centre for Social Policy Herman Deleeck, University of Antwerp*

The social economy in Flanders is an economic sector consisting of social enterprises. To achieve their economic and social goals, these companies rely on government subsidies to employ jobseekers with a large distance to the labour market who need specific support, such as people with a work disability, people with a psychosocial disability and people in long-term unemployment. In total, nearly 30.000 ‘target group-employees’ are active in over 400 social enterprises.

Employment in the social economy is remunerated at the height of the Belgian minimum wage, topped up with a holiday bonus and an end-of-year bonus. As these target group-employees usually rely on unemployment benefits or other types of welfare before being employed in the social economy, it is expected that this transition causes an improvement of the households' disposable income and living standard. However, if and to what extent employment in the Flemish social economy leads to a durable decrease of the poverty risk for those involved has thus far not been studied. The SOCIAL research project funded by the Flemish Government aims to answer this question with an array of quantitative and qualitative research methods including microsimulation, administrative and survey data-analysis, focus groups, and in-depth interviews. At the 2023 FISS conference, I will be presenting some preliminary results of this research project, which indicate the social economy can have an impact on poverty, but work intensity and the family situation are important determinants of outcomes. Beyond income, we find some positive effects of social economy employment on life satisfaction, social network and housing quality.

---

**WORKFARE VERSUS OR PLUS WELFARE: MICRO-LEVEL EVIDENCE ON THE TRADE-OFF BETWEEN  
ACTIVATION AND WELFARE GENEROSITY IN NORWAY**

Bård Smedsvik and Roberto Iacono

*Norwegian University of Science and Technology*

Previous cross-country studies on the debate “workfare versus welfare” have suggested the existence of an empirical relationship between wide-spread increased use of active labour market policies (workfare), and decreasing trends in welfare generosity, operationalized by social assistance adequacy. This article revisits this trade-off with a quasi-experimental event-study design employing Norwegian register data, exploiting municipal variation from a recent reform introducing compulsory activation. Findings from the analysis show no significant relationship between spending on active labour market policies, introduction of compulsory activation, and social assistance adequacy. Hence, our results support the stream of the literature highlighting the non-existence of the trade-off, which leads to the final take-away message: activation policies can be effective without cutting the degree of welfare generosity.

---

**THE REDISTRIBUTIVE CONSEQUENCES OF UNION DECLINE: WHAT IS THE CAPACITY OF ORGANISED  
LABOUR TO REDUCE POVERTY?**

Henri Haapanala, *Centre for Social Policy Herman Deleeck, University of Antwerp*

Ive Marx, *Centre for Social Policy Herman Deleeck, University of Antwerp*

Zachary Parolin, *Bocconi University; Columbia University*

Decades of industrial relations research tell us that collective bargaining and strong trade unions contribute to wage equality through compressed wage distributions. The persistent decline in trade union membership and the weakening and decentralisation of collective agreements suggest as much, as income inequalities and low-wage employment have increased dramatically over recent decades. This brings about an interesting interaction: how does low-wage employment, and the labour market



institutions overseeing it, contribute to poverty? As dual-earner households have become the norm, a large share of low-paid workers are in fact in non-poor households. But at the same time, those low-wage workers that do not have a sufficiently earning partner are trapped ever deeper into poverty. How do trade unions and collective bargaining navigate this messy situation, and are they capable of supporting the most precarious workers? In this talk, I present a draft research agenda with exploratory empirical findings regarding the interactions between low wages, poverty and the role of collective bargaining therein.

---

## **SESSION 8: MINIMUM INCOME SCHEMES**

### **SOCIAL ASSISTANCE AND MINIMUM INCOME BENEFITS: A COMPARISON BETWEEN FIVE ARCHETYPICAL EUROPEAN COUNTRIES**

Daniel van Vuuren, Kim van Berkel and Jellien Knol

*Tilburg University*

This study describes and compares guaranteed minimum income schemes in five European countries: Belgium, Denmark, France, Germany, and the United Kingdom. It considers minimum income schemes aimed at three groups: persons of working age, pensioners, and households with children. We describe the policy instruments in these countries, their coverage, and their effectiveness regarding poverty alleviation and labor market activation. We find that in addition to the basic minimum income transfers, all studied countries provide supplementary transfers, such as housing, healthcare or child allowances. The designs of both the basic income transfers and supplementary transfers differ a lot between the five countries. Poverty among the elderly and households with children also differ a lot between the countries. However, poverty levels of persons of working age are remarkably equal. In all studied countries, except Germany, the minimum income level is higher for pensioners than for persons of working age.

---

### **MINIMUM INCOME SUPPORT SYSTEMS AS ELEMENTS OF CRISIS RESILIENCE IN EUROPE**

Werner Eichhorst, Mathias Dolls, Annabelle Krause-Pilatus, Max Lay and Paul Marx

*IZA Institute of Labor Economics*

This paper studies the role of social policies in different European welfare states regarding minimum income protection and active inclusion. The core focus lies on crisis resilience, i.e. the capacity of social policy arrangements to contain poverty and inequality and avoid exclusion before, during and after periods of economic shocks. To achieve this goal, the paper focusses on minimum income support on the one hand and upstream systems of protection such as unemployment insurance, job retention and employment protection, as they play an additional and potentially prominent role in providing income and job protection in situations of crisis. A mixed-method approach is used that combines quantitative and qualitative research, such as descriptive and multivariate quantitative analyses, microsimulation

methods and in-depth case studies of five countries representing different welfare state types. We find consistent differences in terms of crisis resilience across countries and welfare state types. In general, Nordic and Continental European welfare states with strong upstream systems and minimum income support show better outcomes in core socio-economic outcomes such as poverty and exclusion risks. However, labour market integration shows some dualisms in Continental Europe. The study shows that minimum income support holds particular importance if there are gaps in upstream systems or cases of severe and lasting crises.

---

## **THE EUROPEAN PILLAR OF SOCIAL RIGHTS AND THE MINIMUM INCOME RECOMMENDATION**

Bea Cantillon

*Centre for Social Policy Herman Deleeck, University of Antwerp*

---

## **SESSION 9: POLITICS OF THE WELFARE STATE**

### **ARE THE POLITICS OF CREATING VERSUS EXPANDING SOCIAL RIGHTS DIFFERENT? A COMPARATIVE-HISTORICAL ANALYSIS OF PARENTING LEAVE FOR FATHERS**

Cassandra Engeman

*Swedish Institute for Social Research (SOFI), Stockholm University*

Fathers' access to paid leave has expanded cross-nationally in recent decades. Yet, countries have taken different approaches to creating and investing in leave rights for fathers, and there remains considerable variation in provisions. This presentation examines the politics of fathers' leave access and benefits across 22 affluent democracies and asks: Why have some countries been faster to adopt leave rights for fathers than others? How have fathers' leave provisions developed across countries and over time? And finally, what explains variation in fathers' leave benefits – in terms of time and pay – across countries? Analysis draws from independently collected timelines of leave policy reforms, starting in 1965, and longitudinal and comparative indicators that account for the duration and benefit levels of leave provisions accessible to fathers. The presentation will summarize two published studies and present ongoing research that builds on these studies. Published work examines the timing of leave policy adoption and shows a role for leftist parties and institutions, women lawmakers, and confessional right parties. A second published study identifies five types of fathers' leave provisions and shows how countries vary in the extent to which they offer and invest in these different leave types. Finally, the presentation will focus on preliminary results from a time series cross-sectional analysis of relationships between different political actors and the generosity (in terms of time and pay) of fathers' leave provisions. Overall, the presentation will explore the possibility of different political drivers in the creation of new rights and the expansion of existing provisions.

---

## **POVERTY AS SUBJECT. ON THE SOCIO-POLITICAL NEGOTIATION OF A PERSISTENT WELFARE CRISIS**

Philipp Kahnert

*Otto-von-Guericke University Magdeburg*

The topic of poverty is of great importance as a social problem complex of its own, as a foil for the study of social inequalities, as a socio-political and thus welfare state crisis and processing category, but also as a basic, socio-theoretical element within social sciences.

The paper will be a theoretical chapter from my dissertation. Its research question is: Which discursive and instrumental practices in the socio-political processing of poverty can be understood in terms of their exclusionary characteristics as structures and dynamics of social abjection by the German welfare state within the ALG II since the beginning of AGENDA 2010, and what transformation processes are they subject to with regard to the alteration of understandings of poverty?

With regard to the socio-political discussion of poverty, the dissertation asks not only about the functions and shifts in the rhetorical-discursive uses of the term 'poverty' in parliamentary contexts, but also about the transformation of its abjectifying-excluding instrumentality as a specific welfare-state processing of poverty. According to the hypothesis, this becomes explicit in the socio-political reforms of the AGENDA 2010, above all in the social security provision "ALG II" and its shaping within social law.

The paper will refine current exclusion approaches in poverty research and make the concept of social abjection fruitful for welfare state analysis as an interpretative framework through which to examine neoliberal practices of state making.

The aim of the theoretical analysis is therefore to interlink three levels: Exclusion approaches of poverty research, which have been expanded through perspectives on abjection, are to be further developed from the perspective of welfare state analysis and social theory. The discussion will eventually draw a clearer picture of social abjection as specific exclusion practices of the welfare state for the reproduction of poverty mediated through socio-political discourses and instruments.

---

## **RESPONDING TO SHORTCOMINGS IN THE BILATERAL REGIME PERTAINING TO SOCIAL PROTECTION FOR MIGRANT WORKERS AND THEIR FAMILIES**

Marius Olivier

*University of Western Australia; Nelson Mandela University; North-West University*

Countries routinely turn to bilateral arrangements in an attempt to ensure better social protection for their migrant workers (MWs) and their families abroad.

However, bilateral labour agreements (BLAs) and memorandums of understanding largely ignore the social security protection of MWs. Lately however, UNMN Guidance on Bilateral Labour Migration Agreements and the African Union Guidelines on Developing Bilateral Labour Agreements represent a significant development in setting non-binding standards globally and continentally.

Bilateral social security agreements (BSAs) invariably provide for equality of treatment of nationals and non-nationals; as well as for portability of benefits and other social security coordination principles. Yet, BSAs face significant challenges: they are of limited application (invariably only certain categories of MWs may benefit from them); they may often lack adequate protection and balance, as the country of destination (CoD) is usually in a stronger bargaining position than the country of origin (CoO); the social security system in the CoD may be underdeveloped; and a plethora of BSAs concluded by a particular CoO may create confusion and lack of consistent treatment.

The absence of appropriate bilateral arrangements has forced an increasing number of CoOs to unilaterally extend social protection to their workers abroad. However important, these measures rarely provide for sufficient social protection; a normative framework guiding and supporting CoOs is largely lacking.

Multilateral social security agreements (MSAs) set common standards for participating countries. Much can be done to build into both MSAs and BSAs greater flexibility and the gradual expansion of coverage regarding categories of MWs and types of social security schemes; as well as the social security coordination principles involved (e.g., avoidance of dual social security payments; and portability of social security benefits; totalisation of entitlements).

---

## **SESSION 10: THE LABOUR MARKET**

### **POST-UNEMPLOYMENT EMPLOYMENT DYNAMICS AND THE ROLE OF NON-STANDARD EMPLOYMENT IN GERMANY**

Torsten Lietzmann and Katrin Hohmeyer

*Institute for Employment Research*

The German labour market has gone through an increasing flexibilization during the past three decades and non-standard work (NSW) has been increasing. Almost half (45%) of the employed individuals in Germany in 2018 were employed in NSW (Walwei 2022). At the same time, the social security system has been reformed profoundly in the early 2000s (Hartz reforms) and some smaller adjustments in 2023. One aim of recent (Bürgergeld) reforms has been to improve qualification opportunities and stable labour market integration of the unemployed as opposed to a strong work-first and activation approach of the Hartz reforms.

In this paper we investigate the role of NSW for the labour market trajectories of unemployed individuals for the period 2012-2019. On the one hand, NSW might offer opportunities for some unemployed workers, who can improve their human capital. Thus, NSW might serve as a stepping-stone to permanent employment. On the other hand, NSW might also just buffer fluctuations in labour demand and thus, NSW might foster interrupted employment biographies with workers being often less well protected against social risks, e.g. during the COVID 19-pandemic and against old-age poverty. Previous research finds that whether the dead-end effect or the stepping stone effect prevails depends on several aspects, e.g. the type of NSW or the economic circumstances.

Using rich administrative data from Germany, we study typical labour market trajectories of individuals who became unemployed in 2012-2015 for a four-year period after entry into unemployment. We study whether NSW is transitional or terminal and whether different individual characteristics shape the likelihood for different trajectories. We study the following four types of NSW: part-time, fixed-term, marginal and temporary agency. The sequence analyses yield ten clusters of labour market trajectories, of which six contain substantial periods of NSW. Furthermore, NSW is more likely for but not restricted to sociodemographic groups with low employment prospects. Our results point to a limited potential of NSW as a stepping stone.

---

### **"SURVIVAL" OF OLDER PERSONS IN THE LABOUR MARKET: THE CASE OF LITHUANIA IN THE EU CONTEXT**

Jekaterina Navickė and Žeimantė Straševičiūtė

*Vilnius University*

Population aging raises many questions, challenges, as well as new opportunities for the aging societies. One in five workers in the EU is aged 55+, and the share of older workers among all employed has almost doubled (from 12% to 20%) in the last 15 years (Eurostat, 2020 [lfsa\_ergan]). Lithuanian population ages twice as fast as the EU average, which may result in becoming one of the oldest societies in Europe in 2050. The case of Lithuania is also of interest as, despite of the lag in many socio-economic indicators, Lithuania is among the leaders in the EU according to employment of people aged 55+; employment level in pre-retirement and retirement age has grown rapidly in Lithuania since 2000.

The purpose of this paper is to investigate the micro, meso and macro factors of employment in the age group of 55+ in Lithuania and in the EU context. We also analyse the differences between these factors in pre- and post- retirement age. Data from SHARE survey (waves 7-8) was used for the analysis applying regression techniques. The study reveals that the usual factors of health and workplace quality cannot explain the relatively good employment situation of the elderly in Lithuania, and the positive trends in employment can stagnate. We highlight the push and pull factors, their implications for the employment of older persons in Lithuania and in a broader EU context, as well as possible directions for policy interventions.

---

### **HETEROGENEITY OF FAMILY OLD CAREGIVING ON FEMALE LABOUR PARTICIPATION IN CHINA**

Jing Wang

*Institute of Sociology, Chinese Academy of Social Sciences*

Based on CFPS panel data from 2016 to 2018, the paper deeply studies the impact of caregiving on female labor force participation and its heterogeneity through individual fixed effects model. The results show that: (1) the family elderly care and present negative substitution effect between female employment, take care of labor participation rate, the labor time and labor income marginal effect are 0.2%, 1.2% and 3.0% respectively, to take care of grouping regression found "threshold effect", namely high strength

caregivers bear the labor loss bigger; (2) From the perspective of urban and rural areas, the employment of urban daughters is significantly negatively affected by care. This paper explores two reasons respectively, one is the different pension concepts of urban and rural daughters, the other is the flexibility difference of urban and rural employment modes; (3) By class, the employment of women with lower socioeconomic status is significantly negatively affected by care. Further research shows that upper-class women relieve the pressure of care on their employment by increasing economic support to their parents. This article examines the labor cost of women in family care, which will help to understand the dilemma and risk of family care for the elderly at present, so as to explore how the state and family share the responsibility of elderly care.

---

### **LABOR UNIONS AND LEFTIST SOCIAL POLICY: DIVERGENT PENSION RIGHTS IN KOREA AND TAIWAN**

Young-hwan Byun

*Swedish Institute for Social Research (SOFI), Stockholm University*

Recent welfare state literature rarely discusses the role of unions in social policy change. Unions in fact is an important mediator for the ways in which leftist governments influence social policy. To modify power resource theory, leftist power not necessarily leads to universal social policy. It does if inclusive unions aligns its interest with that of average workers. To test this expectation, the study contrasts pension policies between otherwise the most similar cases Korea and Taiwan. The membership composition defined unions' interests, which made once-similar pension systems diverged by leftist reforms. Inclusive unions led to more universal pensions in Taiwan, while unions of labor market insiders to limited and stratified pensions in Korea. The findings suggest power resource theory to be relevant for non-western welfare states by taking into account union composition. With a low union density, inclusive unions still can channel leftist power to universal social policy.

---

## **SESSION 11: CHILD POVERTY AND -WELLBEING**

### **TRANSFORMING SOCIAL SECURITY FOR YOUNG CHILDREN AND FAMILIES AT A TIME OF CRISIS**

Dominic Richardson and David Harris

*UNICEF Innocenti: Global Office of Research and Foresight*

The majority of countries globally significantly underinvest in social security for the youngest children. From pregnancy to age of five, families in high-income settings are subject to a portfolio of social security policies over a short period of time – yet on average receive lower public expenditures than when children are in school. In low-income countries, where fewer social security policies exist, many children go without benefits entirely.

During this critical period of human development – early childhood – families are particularly vulnerable. On average, families with young children are larger, poorer, and less-attached to the labour market than working-age families with older or no children.

A difficult situation for young families everywhere has been exacerbated by a series of crises. The combined effects of COVID-19, the cost-of-living crisis, climate change, and a land war in Europe, have significantly worsened living conditions for millions. And although countries implemented some social security for those caring for the youngest during COVID-19, these measures have been withdrawn – leaving societies and families to deal financial insecurity and lingering inflation alone. At the national level, government debt puts pressures on both governments and markets, and is a recipe for retrenchment and austerity of a kind not dissimilar to that of the global financial crisis of 2008.

This paper presents evidence from 84 countries world-wide of how and when money is spent on the earliest years of child development – with trends for OECD countries – comparing expenditures across the child’s life course, and social security to other key sectors for families with children. It concludes with recommendations for transforming social security in these countries to better address the needs of the youngest children, their families, and societies as a whole at a time of continued crisis.

---

**UNIVERSAL, TARGETED OR BOTH: EFFECTS OF DIFFERENT CHILD SUPPORT POLICIES ON LABOUR  
SUPPLY AND POVERTY - A SIMULATION STUDY**

Kerstin Bruckmeier, Diego d'Andria and Jürgen Wiemers

*Institute for Employment Research (IAB)*

We study a set of hypothetical reforms of child benefits in Germany using a static tax-benefit microsimulation model augmented with endogenous labour supply and take-up choices. We distinguish between a reform of the universal non-means-tested child benefit, a reform of the mean-tested child benefit under the minimum income scheme, and a combination of both. Since the reforms are associated with different fiscal costs, we consider two different budget closures: an increase in the income tax or the consumption tax. The model simulates the impacts of the reforms on household income, poverty and labour supply. We find that improvements in the means-tested child benefit are well-targeted: They provide a high level of poverty reduction with a low fiscal impact at the cost of reduced labour supply incentives for low-income families. When unconditional benefits are increased, the effect on overall income inequality is more pronounced at the cost of reduced labour supply incentives for middle- and high-income families. Finally, when combined, the two approaches show synergies, particularly in the form of improved poverty reduction.

---

**THE ROLE OF SOCIAL TRANSFERS IN REDUCING THE POVERTY RISK OF LARGER FAMILIES IN THE  
EUROPEAN UNION**

Lauri Mäkinen, *Iitla Children’s Foundation and University of Turku*

Aapo Hiilamo, *Iitla Children’s Foundation*

Ilari Ilmakunnas, *Finnish Centre for Pensions*

Reducing poverty is a top priority in the European Union. According to the most recent goal, the number of children living at the risk of poverty or social exclusion should be reduced with 5 million by the year 2030. Child poverty is impacted to a great extent by family demography, with large families and single

parents having a greater risk of being poor. It is well established that poverty during childhood has negative causal effects on children’s cognitive, health and social outcomes.

Social transfers are one of the key instruments in poverty reduction. We examine the extent to which social transfers affect the poverty risk among large families in 28 European countries. Large families are defined as families with three or more children. The analysis is conducted in two phases: we first look at the poverty rates before and after the social transfers. We then examine which types of social benefits are of most importance in alleviating the poverty of large families while examining separately families with low work intensity and high work intensity. We compare these analyses across countries and against the families with one or two children to provide evidence about how social security benefits reduce poverty for different families with children.

The article takes advantage of EU-SILC data for the year 2020 and operationalizes poverty as income poverty. To provide a more comprehensive picture of poverty, we examine poverty gaps in addition to poverty rates. Poverty gaps can provide useful information about the improvement of living standards that social transfers have.

The study provides new information regarding poverty of large families, in general, and the impact that social security has on the prevalence of poverty among large families in particular.

---

## **SESSION 12: WHAT’S SOCIAL SECURITY GOOD FOR? A CASE STUDY OF THE UK IN A TIME OF PERMA-CRISIS**

### **PANEL: MOVING FROM HOPELESSNESS TOWARDS HOPE AMID PERPETUAL CRISIS: DESPATCHES FROM THE UK**

Ruth Patrick, *University of York*  
Maddy Power, *University of York*  
Jim Kaufman, *University of York*  
Jamie Redman, *Sheffield Hallam University*

In the UK, we have lived through a period of perma-crisis, enveloping Brexit, the pandemic, and the harsh effects of the cost of living crisis. These events are unevenly felt, with particularly adverse consequences for those living in poverty either before or because of these crises. The UK’s context is one where we witness a collision of socio-economic crises and repetitive policy failure, including a growing erosion in trust in the mechanisms of government. This context can and often does feel hopeless, and yet we argue in this paper that it can be productive of hope, fuelling resistance, struggle and the pursuit and production of alternative, better futures. We present an alternative conception of hope, one which draws in particular on the insights of Lisa Duggan and Jose Munoz (2009) and Rebecca Solnit (2016) and presents hope as a practice of critical thought, action and transformative behaviours. We reflect on our work on Changing Realities, a participatory research programme, which partners with over a hundred parents and carers on a low-income to document everyday realities and advocate for change. We explore the spaces of and for hope that this work generates, the heightened ethical challenges associated with this, and the particular methodological approach we adopt which allows for hope-generative discussion and



argument. We argue that working with hope can be transformative for all involved, even when the political context remains bleak.

---

**PANEL: ‘ALL OF THIS IS HAVING A STRAIN ON THEM’: EXPLORING HOW THE UK’S BENEFIT CAP AND TWO-CHILD LIMIT HARM CHILDREN**

Ruth Patrick, *University of York*

Kate Andersen, *University of York*

Kitty Stewart, *London School of Economics and Political Science*

Jamie Redman, *Sheffield Hallam University*

Internationally, there are increasingly large variations in the treatment of children and young people within social security regimes (Stewart et al, 2023). Recent years have seen both significant investments in support for children (e.g. through the USA’s Child Tax Credits) and also radical withdrawal of support, in some cases explicitly targeted at children in a household. In this paper, we explore the UK social security system, focusing especially on the introduction of the Benefit Cap and the Two-Child Limit, two new policies that reduce entitlement for households claiming means-tested benefits. Both policies disproportionately affect households with dependent children and are expected to lead to a rise in child poverty.

The Benefit Cap and the Two-Child Limit were introduced under the Conservative-Led Governments of 2010-2017 as part of a wide ranging austerity and welfare reform agenda. Both policies create a sharp and historically significant break in the relationship between need and entitlement in social security provision. The Benefit Cap limits the total amount of benefit income some low-earning or non-employed households can receive and the Two-Child Limit restricts support provided through means-tested benefits to two children in a household.

In this paper, we draw on findings from a major mixed-methods research programme to explore the harms these policies are doing to children in affected households. We draw on the family stress and investment models to do so; bringing them into conversation with rich qualitative data generated from three rounds of interviews with parents affected by the two policies between 2021 and 2023. We share the multiple and severe overlapping harms that are done to children, and pull out key policy implications that emerge from this, as well as reflecting on the utility of the examined models to properly understand the relationships between poverty and children’s experiences and outcomes.

---

**PANEL: FOOD INSECURITY, POVERTY AND MENTAL HEALTH IN THE UK: UNDERSTANDING AND ADDRESSING INEQUALITIES**

Maddy Power

*University of York*

Drawing upon over forty in-depth interviews with people living on a low income and experiencing food insecurity, this paper explores the impact of food insecurity and poverty on the mental and emotional

health of people living on a low income in the North and South of England. It considers the complex relationship between poverty, experiences around food, and mental health, and highlights where and how access to services, including both charitable food aid and statutory mental health services, can alleviate or instead exacerbate the mental health consequences of poverty and food insecurity. It considers how inequalities in age, gender and race impact the lived experience of food insecurity and mental health, drawing attention to examples of racial discrimination in access to and experiences of mental health services and charitable food aid. The paper will argue that we need to urgently rethink the societal-level response to food insecurity and mental health in the UK.

---

## **SESSION 13: OLD-AGE SPENDING**

### **THE EFFECT OF KOREAN SEVERANCE PAYMENT ON INCOME AND WEALTH AFTER RETIREMENT**

Dongjin Kim

*Seoul National University*

It is well known that Korean old-age poverty has been the highest among OECD countries. The main reason for this problem is that both the contribution and replacement rates of the Korean national pension system (NPS) are considerably low. The total contribution rate is only 9%, and the replacement rate is decreasing to 40%. To address this problem, the Korean government convenes a special committee to reform NPS every five years. The last special committee was formed in 2018, and the committee members tried to increase the contribution rate. However, one of the committee members representing employers strongly opposed this suggestion because employers already have an 8.3% contribution rate of mandatory severance payment (SP).

Korean mandatory SP was established in 1961 to protect employees after retirement instead of social security systems. Even though Korean social security systems have been established and extended since 1988, most employees still want to retain mandatory SP because they can freely do investments with SP for their wealthy old age.

Mandatory SP has a long history and is remarkably prevalent in Korea. Nevertheless, there is no study to examine the economic effect of mandatory SP after retirement. The goal of this paper is to assess the effect of mandatory SP on income and wealth after retirement and provide suggestions to reform mandatory SP.

As a result of our investigation, mandatory SP may not be sufficient to provide a stable source of income for retirees, as it does not support as much as lost labor income after retirement. On the other hand, mandatory SP appears to increase housing wealth and the rate of homeownership. These results suggest that Korean mandatory SP causes retirees to sacrifice their stable income after retirement in exchange for housing wealth. We recommend that Korean mandatory SP should convert mandatory Retirement Pension.

---

## **OLDER PEOPLE POVERTY IN THREE DIMENSIONS: INCOME, CONSUMPTION, AND WEALTH**

Inhoe Ku and Dongjin Kim

*Seoul National University*

This study examines older people poverty in three dimensions: income, consumption, and wealth. Most assessment of old-age poverty has focused on an income-dimension of material well-being, assuming that income is the most important determinant of the goods and services over which individuals have command. Alternatively, other studies argue that consumption may better capture the level of economic well-being in later life, relying on the permanent income hypothesis. Another approach calls for an inclusion of wealth when evaluating a living standard especially after retirement. We first conceptually investigate strengths and weaknesses of each approach. We also examine conventional measures of poverty based on the three approaches and show how improved measures change profiles of older people poverty in the case of South Korea. Then, we compare different aspects of poverty among older Koreans revealed by the three approaches. We inspect a potential divergence between income poverty and consumption poverty and assess the role of wealth in accounting for the divergence. Finally, we propose a way to combine them for an integrated assessment of older people poverty, considering that income, consumption and wealth as three complementary dimensions of economic well-being. We construct a measure of resource poverty based on both income and wealth dimensions. We compare the measure of resource poverty with a measure of consumption poverty and discuss how to integrate the two measures as complementary, rather than substitutive, ones. We show whether and how using the integrated multi-dimensional framework changes our understanding of the high incidence of poverty among older Koreans relative to younger ones and relative to older people in other industrialized countries with different institutional settings.

---

## **THE WELFARE STATE AND THE CROWD OUT EFFECT: OLD AGE SOCIAL SPENDING AND QUALITY OF LIFE AMONG THE OLD**

Oda Nordheim

*Norwegian University of Science and Technology*

The welfare state has a large potential of securing the well-being of individuals in the later stages of life, however, it is also theorized that welfare initiatives can crowd out social capital, which can deprive older individuals of social participation and social contact that is important for quality of life in later stages of life. This paper investigates how social spending related to old age affects the quality of life among older individuals, focusing on loneliness, self-rated health, and life satisfaction, and whether higher spending is associated with more support for state responsibility for welfare services among the old. Old age social spending is analysed in terms of total old age spending, as well as two underlying categories indicating whether the spending is associated with cash benefits or benefits in kind. The paper uses multi-level analysis of 24 countries, with data from European Social Survey and OECD statistical database between 2002-2020, disentangling the cross-country association from the longitudinal association, allowing for interpretation of the effects associated with both between-country and within-country changes in spending. Preliminary findings show that higher average levels of old age social spending over the time

period are associated with higher levels of loneliness, however, investments in benefits in kind are associated with lower levels of loneliness. Increased spending on benefits in kind is also associated with better self-rated health, more satisfaction with life, and more support for the government taking responsibility for the standard of living for the old. The analyses focus on a sample of individuals aged 60 and above but will also look at subsamples of younger and older individuals within this age group as individuals' needs change considerably through this period in life.

---

## **SESSION 14: LONG-TERM CARE POLICIES**

### **DIVERGENT PATHS OF LONG-TERM CARE PROVISION IN EAST-ASIA: A COMPARATIVE PERSPECTIVE**

Wing Kit Chan, *Sun Yan-sen University, China*

Jiayu Zhang, *School for Business and Society, University of York*

Zhongyan Zhang

Given the rapidly growing care demand of the ageing population, public long-term care insurance has been introduced in many countries for resource pooling to ensure sustainable and sufficient care provision for older people in need. Although the long-term care insurances in East Asian societies (Japan, South Korea, and China) are argued to learn from the German one to a certain extent, diverse service funding and provision mechanisms of long-term care are witnessed in these cases, for instance, varying from the eligibility to benefits to the care types and the care providers. Notably, despite the long-debated residual welfare system in East Asia, formal care delivered by those beyond the family is primarily adopted in Japan and South Korea. Correspondingly, informal care has been gradually included in China's programme, revealing divergent paths of long-term care provision in East Asia. The reasons for these variations are still under discussion.

This paper explores how long-term care insurance has developed in response to the challenges mainly driven by the worsening demographic structures in contemporary East Asian societies (Japan, South Korea, China). The caring responsibility in funding and provision dimensions has been reconstructed among actors from the public, private, voluntary, and informal sectors. The gender division of labour has also been reflected in the policy designs. Care inequalities among individuals may also merge or expand due to the specific policy settings, even with the implementation of public insurance schemes as the state's interventions targeting the care demands of older people.

---

### **CASH VERSUS IN-KIND TRANSFERS FOR LONG-TERM CARE PROVISION IN CHINA**

Jiayu Zhang

*School for Business and Society, University of York*

In the ageing society, the current care systems for older people have been in unprecedented crisis in many countries. It is particularly the case in China, which has the world's largest ageing population. With the implementation of the long-term care insurance pilot programme in 2016, diverse service delivery

patterns have been established in China's fragmented care system. However, in its early development, the adequacy and sustainability of long-term care provision in China remain contested.

This paper attempts to fill the research gap through an insightful discussion of long-term care provision in China. Based on an empirical study in Guangzhou City, one of the typical cases of long-term insurance exploration in China, this paper investigates how long-term care has been delivered, mainly as cash or in-kind transfers, and the underlying explanations of the different patterns employed and outcomes. A thematic analysis was conducted based on the data collected from semi-structured interviews with different groups in the care system, including disabled older people, caregivers, care homes, insurance enterprises, and government officials (N = 36). The findings indicate that different groups prefer cash transfers for various reasons. More adoptions of both cash and in-kind transfers of long-term care in pilot cities reflect policy responses to changing demographic and socioeconomic transitions, primarily accounting for local government's capacity to develop care systems and individuals' capacity for care alternatives. The long-term care provided as cash transfers, mainly the informal care delivered by the family networks, is essential and feasible for satisfying the pressing demand for more comprehensive coverage. The social reproduction of families in Chinese society is illustrated, which policymakers have also recognised in developing long-term care.

---

## **FORMAL SYSTEM AND SOCIAL BASE: DIFFERENT ELDERLY CARE SERVICE PRACTICES IN RURAL CHINA**

Chen Liang

*Institute of Sociology, Chinese Academy of Social Sciences*

In China's vast underdeveloped rural areas, the aging problem is becoming increasingly more prominent due to the great changes in family structure. Family elderly care is facing challenges, and the socialization of elderly services is imperative. Influenced by economic factors and social concepts, rural elder people mainly aging in place instead of living in nursing home. Governments at all levels tried to innovate the system construction of home-based elderly care service model. However, the formal system may face difficulties in the process of landing in rural area and needs to be integrated with the local social base. This study will take the elderly care practices in Shandong, Jiangsu and Fujian Province as examples to analyze the situation and difficulties of the connection between the formal elderly care system and the original social basis of elderly care in rural areas. The study found that the formal system needs be integrated with the original informal care such as family, relatives and neighborhood and community mutual assistance in rural areas in order to operate smoothly in practice. However, in some regions, the deficiencies in the policy designing and cultural discrimination against caregivers and other factors will restrict this connection, so that the formal system cannot be integrated with the social base.

---

**CARE AS SOCIAL RIGHT: A CASE STUDY ON LONG-TERM CARE POLICY AND SERVICE  
TRANSFORMATION IN QINGDAO, CHINA**

Wenbo Zhang

*Institute of Sociology, Chinese Academy of Social Sciences*

With the significant emergence and rapid growth in demand for long-term care (LTC) services, policy areas concerning LTC services have generally evolved in global aging countries, especially in the past 2-3 decades. China has entered an aging society at the turn of the century, while also witnessing the emergence of LTC services. However, prior to the proposal of the first batch of National Urban Pilot Projects in 2016, the development of LTC service policies in different cities varied greatly due to the differences in the aging degree of local societies. This paper takes Qingdao, the first city in China to launch the relevant system of LTC services, as the investigation object, and aims to conduct a case study of the development and transformation of Qingdao's LTC service-related policies. The focus primarily lies on the analysis of institutional setting, the level of integration of the policy domain, and the shift of service organization and provision. Research indicates that the LTC system itself in Qingdao has experienced a continuous improvement in the level of integration of policy fields and department cooperation. Moreover, the idea of LTC policy has shifted from an identity-oriented to a demand-oriented development, with the aim of improving the provision and delivery of social services while responding to the care needs as social right, which objectively promotes social justice and social harmony.

---

**SESSION 15: OPEN STREAM**

**DIGITAL STORYTELLING FOR YOUTH MENTAL HEALTH - RECONNECTION, ENGAGEMENT, INCLUSIVITY**

Csenge Kolozsvári and Szandra Varju

*Hidak Ifjúsági Alapítvány*

Young people nowadays face multiple challenges: social inequalities are rising; social mobility is decreasing in most of the European countries; the labour market requires new skills and public education cannot always keep up with these needs. It is not surprising that feelings of anxiety, helplessness, loss of personal integrity are more and more common problems among young people in Europe made even worse by the COVID-19 pandemic. With the framework of the Digital Storytelling for Youth Mental Health project, we carried out international research in the framework of the project in Hungary, Slovakia, Slovenia, Portugal, and The Netherlands.

The literature review focused on digital storytelling and its innovative methods (e.g., animation, comics) and youth work on mental health in digital environments. Traditional storytelling methods and findings were involved too in the theoretical research. Then, national best practices were presented on two main topics: digital storytelling and youth work on mental health in which we collected existing, well-working practices regarding youth mental health and digital youth work. To get a deeper understanding on the project's topic and the selected best practices, we conducted 3 semi-structured interviews in each country, 15 in total.

In conclusion, digital storytelling can be an excellent pedagogical tool that allows youth to engage both in subject matter learning and self-reflection (Brites et al., 2019), therefore it can be an effective tool to combat mental health issues too. However, to use it effectively requires a lot of background knowledge, skills, sensitivity and 21st century competence. Our research emphasizes the importance of reconnection and community, learners' motivation and creativity, inclusive approach of digital education, digital literacy education, facing the challenges of cyberbullying, ethics, and legal implications of digital storytelling.

---

## **THE IMPACT OF THE EARTHQUAKE ON THE LABOUR FORCE AND THE RESPONSE OF THE SOCIAL SECURITY SYSTEM IN TÜRKIYE**

Oğuz Karadeniz

*Pamukkale University*

Türkiye was shaken by three big earthquakes with a magnitude of 7.8 and 7.5 in Kahramanmaraş on 06 February 2023 and 6.4 in the Defne district of Hatay on 20 February 2023. More than 50,000 people lost their lives in the earthquakes, and more than 100,000 were injured. Approximately 15.7% of the population was living in 11 provinces affected by the earthquake before the disaster. Employment in the region was 12.3% of total registered employment. There are very few studies in the literature on the effects of natural disasters on the labour market and social security response to earthquake crises.

The aim of the study is to estimate the effects of the most devastating earthquake in the history of Turkey on the workforce and to discuss to what extent the social security system can protect households from this severe crisis.

In the estimation of the effects on the labour market and the loss of labour, estimated labour losses are calculated based on the number of houses destroyed and the number of people working in the household. In the first method, workforce losses were estimated by using the number of employees per household in the region and the number of demolished houses from the TURKSTAT Household Labour Force Survey micro data set (2021) and government earthquake reports. As the second method, monthly statistics of the Social Security Institution were used. As a result of the study, it was concluded that the workplaces have been affected due to the earthquake were generally micro and small workplaces.

It will be tried to estimate to what extent social security benefits can fulfil the task of acting as a cushion against a major natural disaster in terms of the coverage and amount, using the micro datasets of the household labour force survey and income living conditions surveys.

---

## **UNDERSTANDING CHINA'S WELFARE SYSTEM FROM THE PERSPECTIVE OF RURAL RESIDENTS' NON-EMPLOYMENT INCOME**

Chunguang Wang

*Institute of Sociology, Chinese Academy of Social Sciences*

There is no academic consensus on exactly what kind of welfare system China has in place. China does not fit into Anderson's classification of the welfare state, nor does it fit into the East Asian productivist welfare model. This paper tries to think about the pattern of China's welfare system from the composition and level of rural residents' non-employment income. Non-employment income of rural residents in China can be divided into three categories: fiscal transfer income (such as endowment insurance income, social subsistence income, etc.), social transfer income (charity income, transfer income, etc.), and market income (land and housing rental income, interest income, etc.). The research has the following findings: 1. In the recent 20 years, the fiscal transfer income has increased rapidly, the urban-rural gap has narrowed, but the absolute gap is still expanding; 2. The gap between urban and rural market income is the largest, and the market income in rural areas is relatively small; 3. Among social transfer income, charity income has increased, but the amount is still very small; Intergenerational transfer income has also increased. These findings show that China is not yet a high-level welfare state, and the gap between urban and rural welfare is still very large. Family and community still play a important role in rural welfare system Therefore, China needs to find the possibility of reconstructing the new welfare state system from its own cultural and institutional resources and learns the practical experience of other countries, especially East Asia countries.

---

## **COMPARING PUBLIC TRANSFERS TO IMMIGRANTS AND NATIVES IN CANADA: A NATIONAL TRANSFER ACCOUNTS APPROACH**

Gilbert Montcho, *University of Ottawa*

Julien Navaux, *Université du Québec*

Marcel Mérette, *University of Ottawa*

Yves Carrière, *University de Montréal*

In Canada, immigration constitutes the primary response to population ageing. While extensive research has covered the impact of immigration on various aspects of labour supply, the financial aspect has received less attention. In this study, we apply the National Transfer Account (NTA) method and demographic decomposition to estimate the net fiscal cost, including social security, of immigration in Canada between 1997 and 2015. Results show that, on average, immigrants received about CAN\$1,710 more in net transfer per capita than natives between 1997 and 2015. However, this cost is mainly the result of labour market imbalances which, after removing the effect of demographic differences, account for 85% of the surplus.