



Change and Stability of Social Protection Systems in Societal and Ecological Transitions

A Scoping Study

Olli Kangas and Pascale Vielle
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1. Introduction

This is a joint report on scoping studies carried out by Olli Kangas (first part) and Pascale Vielle (second part) on social protection systems in societal and ecological transitions. The study has been prepared in the context of the forthcoming [Social Transformations and Resilience Partnership](#) under Horizon Europe.¹ Expected to be launched in 2027, this Partnership aims to create a transformative research and innovation programme in the social sciences and humanities to strengthen resilience, fairness, inclusiveness, and social cohesion in response to major societal challenges. One of the Partnership's key impact areas is the modernisation of social protection systems and essential services. This scoping note aims to identify previous and present important research trends, discourses and gaps, as well as EU funding and emerging research networks.

Whereas this scoping note has a common introduction and conclusions (Sections 1 and 15), the two parts “Change and Stability of Social Protection” and “Ecological Transition and Changes in Social Protection” are separate but interlinked. The authors come from different disciplines with different research traditions. The two parts mirror these disciplinary differences, by illuminating the challenges and threats to European welfare states caused by societal and ecological changes. Whereas the first part looks at the economic sustainability and social acceptability of the welfare state, the latter part concentrates on the planetary sustainability of European societies and their welfare states.

The STR partnership's [draft guidance proposal](#) highlights the importance of taking advantage of the diversity of institutional systems, welfare state models, labour market institutions and cultures in Europe, which is seen as a 'natural laboratory' for exploring innovative solutions aimed at strengthening the resilience of societies. By focusing on social experiments and studying their potential for adaptation to different contexts, Europe could generate valuable knowledge for modernising its social protection systems and education and training institutions. The aim is to preserve and strengthen the European social model, based on fair working conditions, social dialogue and equity. This would enable Europe to better face future challenges, such as technological developments, demographic changes and labour market disruptions, while ensuring inclusive and cohesive societies. By establishing partnerships to study and experiment with these social

¹ European Partnerships are key instruments in Horizon Europe, which bring together the European Commission and private and/or public sector stakeholders to address some of Europe's most pressing challenges through research and innovation. These partnerships aim to leverage the combined expertise and resources at EU, national and regional level, and ensure sustained impact through long- term strategic planning and funding of research and innovation actions.

models, Europe could facilitate a smoother transition to the future of work, reduce inequalities and lay the foundations for economic and social systems that are both resilient and adaptive. The guidance proposal calls for "developing research to support the modernisation of social protection and inclusive access to essential services, in particular for groups at risk of poverty and social exclusion".

The paper begins with an analysis of the challenges to the stability and transformation of the welfare state, given the important changes European societies are undergoing. Historically, structural transformations in the economic system have altered the content of social policies. The overarching question is to what extent the new digital mode of production will challenge the old forms of industrial social insurance. Additionally, demographic changes – specifically the ageing of the population – will accentuate issues such as pension security and long-term care. Furthermore, it will create new patterns of family formation, necessitating new and more flexible family policy solutions.

Although these challenges may be common to all European welfare states, but due to differences in institutional setups, revenue collection channels to finance public expenditure, and varying demographic and family structures, policy reactions and outcomes may differ across welfare states. Within a welfare state, there may be also shifts between income transfers and social services, as advocated by proponents of the social investment paradigm. There may also be shifts from public (legislated) benefits towards collective labour market benefits, individual insurance policies (fiscal welfare), and gradually transferring responsibilities to families (e.g., in the case of day-care and long-term care). The latter aspect will primarily affect women. These questions are discussed and analysed in Section 3.

Section 4, in turn delves into drivers of inequality. Inequality is an elusive concept, and it can pertain to ex-ante scenarios, i.e., equality of opportunity, or to ex-post situations, i.e., equality of outcome. Inequality can be defined very narrowly, only including income and income differences, or it can encompass all possible spheres of life where we encounter unequal outcomes and processes. Consequences of widening income gaps are manifold, mediated through complex stratification processes where the hypothetical primary causal effect, i.e., income inequality, is deeply intertwined with gender, ethnicity, and outcome factors such as education, social class, and health. Thus, inequality must also be evaluated in terms of societal openness by focusing on intergenerational income and social mobility, the influence of socio-economic background on educational, equality in health and mortality. These elements are intertwined with demographic variables such as age, gender, and ethnicity.

People live in a symbolic environment that affects and often steers our behaviours and choices. While some of these symbolic elements are socially widely shared, others are more group-specific, even personal, although still socially generated and constrained. Some of these elements are resistant to change, while others may change quickly as the world we live in evolves. In Section 5, we examine the

stability and potential changes in the European value systems. These changes may have significant repercussions on how future welfare states will be organised in Europe. The section delves deeper into factors that affect the social acceptability – legitimacy – of the welfare state and the state's normative involvement in providing social security.

The basic aim of social policy is to guarantee social security to people. The difficult question is how much is enough and how much is too much, given the changing expectations and the work incentives and disincentives the welfare state creates. Starting with work incentives, social services in general and family policy services in particular open up possibilities for all genders to be employed. The universal social transfer system, in turn, facilitates labour mobility from one occupation or industrial sector to another. To a much greater extent, targeted and means-tested social assistance schemes create strong work disincentives. There is also an abundance of studies showing that in some cases, work does not pay properly. The issue between social policy and employment is the focus of Section 6. The section thereafter offers a summary of the social policy discussions from Sections 3 to 6.

The second part of the report starts with a discussion on a 'triple transition' (Section 10). The triple transition pertains to ecological, digital, and demographic changes that the industrialised countries are experiencing. Each of these changes has its socio-political impacts. The section discusses conceptual differences between “ecological transition” and “ecological crisis.” Historically, changes in the mode of production have had huge ecological impacts, for example, the transition from agriculture to industrialisation. There is no doubt that the digital mode of production will have its own environmental impacts. Similarly, demographic changes will alter patterns of consumption which, in turn, will have ecological repercussions.

Based on these general considerations, the overall research question for the second part of the report will be formulated: How, in the context of an ecological transition, can research support the transformation of social protection systems to adapt to and mitigate the consequences of ecological changes and possible ecological shocks? The analysis of transformation is based on Peter Hall's seminal trichotomy of societal change: first-order change (pertaining to routine adjustments to existing policies), second-order change (changes in the policy instruments used to achieve shared goals), and third-order change (shifts in the goals themselves). The aim is to explore changes from traditional or industrial social protection towards “ecological social protection” and the theoretical and methodological changes this transition possibly demands. The section also specifies relevant data sources to answer to the research question.

The title of Section 11 summarises central findings of the subsequent analyses: “a poorly structured field with unevenly explored themes”. During the last decade, there have been efforts to develop guidelines and pathways towards environmentally sustainable economics that are also inclusive for all. However,

despite all efforts, the interplay between social protection and ecological transition is not a widely studied area. Social policy researchers and environmentalists seem to work in their respective silos without collaborating. Furthermore, the problem seems to be that social policy experts are poorly trained on environmental issues, which has led to their absence, for example, in international discussions. The same phenomenon is visible in most social policy journals, conferences, and publications.

Sub-section 11.2. offers a conceptual discussion on various “risks”, how they are socially constructed and how they are covered by the state, the market, and the family. The respective role of these three sources of social protection varies between different countries and welfare regimes. Different modes of production have their own specific risks to which people are exposed. The exposure varies in line with socio-economic group, gender, ethnicity, and other background characteristics of an individual. The central finding is that research on social risks must be brought closer to research revolving around environmental and ecological risks.

One central concept in studies analysing the development of social policies has been the concept of “rights.” Following T.H. Marshall’s somewhat evolutionistic analysis of how rights have expanded from civil rights to political rights and finally to social rights attached to social citizenship. Section 11.3 introduces a fourth rights-based category: ecological or environmental rights and citizenship. One central element in achieving this full citizenship status is fortifying individuals’ capabilities to cope in changing societies where they live and give them possibility to actively participate in various functions in their society. In the conceptual framework of eco-social policy, “participation” does not only mean participation in the labour market but also includes participation in reproductive and ecological work.

Regarding the transformation of production and risks generated by these changes, the state may be going through transformations, too. Some researchers have suggested that the state that takes environmental issues seriously should be labelled as ‘environmental state’. This transformation is in the focus of Section 11.4. The environmental state also is an enabling state which aims to provide people and group of people more tools and capabilities over the public services they receive to improve their own wellbeing.

To successfully tackle all these changes and transformations, new research orientations and methods must be applied (Section 11.5). The reason is that traditional methods and approaches are insufficient to comprehend the multifaceted interactions between social and ecological transformations and crises. While research into social protection has deployed deductive and quantitative methods in the search for the “causes of effects,” more emphasis should be placed on understanding comprehensive processes and finding the “effects of causes.” Furthermore, the new research agenda emphasises co-

creation between researchers, public and private actors, citizens, and target populations of various social policy measures.

Finally, Section 12 offers a summarising discussion calling for stronger integration between “traditional” social policy research and environmental issues to reduce social problems caused by ecological crises. Such an integrative social-ecological approach offers promising ways to integrate social justice and ecological sustainability.

Change and stability of social protection

by Olli Kangas

2. Change and stability: research questions

The specific objective of this “Change and stability” part of the study is to delve in a number current issues in the present-day welfare states and studies revolving around. Each of these themes will be discussed below in their respective sub-sections. The report will map some developmental paths, different approaches, research traditions and possible gaps in the field of welfare state studies focussing on possibilities and challenges in the following aspects:

- Stability and effectiveness of the social security and essential services;
- Drivers of inequalities;
- Changing welfare expectations and norms;
- Linkages with social protection and employment/changing labour markets.

Due to space considerations, many important researchers—though hopefully not many significant research traditions—have not found their way onto the subsequent pages. When searching for relevant studies, mainly two digital libraries: *JSTOR* and *CORDIS*. *JSTOR* that offers access to more than 12 million journal articles, books, images, and primary sources in 75 disciplines. I included the following disciplines in my searches: Economics, European Studies, Gender and Feminist Studies, History, Labour & Employment Relations, Political Science, Social Work, and Sociology. Time range spans from 2015 to 2025 (if not specified otherwise). *CORDIS*, in turn, provides comprehensive information about EU Research & Development projects.

Needless to say, due to the sheer number of publications (in some to 20,000 hits), it is impossible to produce a comprehensive and all-encompassing synthesis to summarise all the themes and research results. A few of the studies are taken as examples and as a flavour of the research revolving around welfare issues.

3. Stability of social security and essential services

In its report, [*The future of social protection and of the welfare state in the EU*](#) the high-level expert group disentangles a number of megatrends that will challenge the stability of social protection and on the welfare state: the digital transformation, changing demographics and climate crisis and new labour environments. All of them have their own impacts upon the stability of welfare policies.

T.H. Marshall (1949) presented an evolutionary theory on the expansion of social rights as a natural outcome of the successive development of civil and political rights. We could also speak about “environmental” rights as done in Section 11.3. Marshall's ideas has also been challenged. On the one hand, macro-historical comparative analyses proved that the development of citizenship rights was a

result of fights between political actors (e.g., Korpi, 1989). Differences in power resources lead to different welfare solutions, and groups of countries tended to cluster around similar socio-political models, welfare state regimes (Titmuss, 1974; Esping-Andersen, 1990). In the 1990s and early 2000s, the regime debate revolved around the existence, characteristics and the number of the regimes (for a more detailed discussion, see Morgan, 2001; Greve, 2019 and Beland et al., 2021). Although the regime debate is old, it has its repercussions on present-day studies revolving around the welfare state (see e.g., Timonen, 2025).

On the other hand, new economic and demographic challenges compel decision-makers to critically evaluate the domain of welfare policies and cut back social rights. In this brand of social research, Paul Pierson's (1995) book *New Politics of the Welfare State* launched an avalanche of austerity studies on the crisis of the welfare state (for a summary, see e.g., Sainsbury, 2001). Consequently, stability and change of the welfare state became a theme. In this genre, it was seen that institutions constrain possibilities to change them. Institutions are sticky and have inertia. Therefore, most decisions on social policy reforms are path-dependent, and some welfare state regimes, states and programs may be more robust and stable than some other (see for example, Mahoney & Thelen, 2010; Häuserman et al., 2012). Due to their stickiness, changes tend to be more incremental, belonging to the first and second-order changes rather than more fundamental third-order changes (see Section 10.1.).

Analytic approach in those discussion was comparative. Data used were either drawn from social expenditure statistics compiled by the OECD, or they based on data on generosity of welfare programmes. That data were produced by large-scale projects such as [SPIN](#) or [CWED](#). The SPIN research project housed at the Swedish Institute for Social Research (Stockholm University) provides comparative and longitudinal data on the development of welfare states and social citizenship rights. The CWED project compiles data on the structure and generosity of social insurance benefits across 33 countries. The principal investigators are from University of Connecticut, Finnish Centre for Pensions and University of Greifswald. Regardless of what data was used, welfare regimes were included in the analysis in one way or another as they also are in many research projects discussed later on whether the question is of stability, inequalities, norms and legitimacy of welfare programmes.

3.1. Digitalisation

Oftentimes, the digitalisation of production is depicted as a threat that will erode paid labour and replace it by platform-based self-employment (e.g., Ford, 2016; Frey & Osborne, 2017). There is a plethora of studies revolving around impacts of digitalisation, including platform work. Most of the publications are descriptive and attempt to map the historical development and the quantity of the phenomenon. The search based on CORDIS for 'digitalisation' AND 'social' AND

'protection' yields as many as 8,859 results. The research projects funded by the EU and their resulting publications are more inclined towards problem-solving than the typical academic publications covered by JSTOR. However, neither are all the CORDIS hits relevant for our purposes, but still there are several EU-funded projects that delve into digitalisation and (platform) employment and changes in social policies in greater depth.

[Beyond 4.0](#) (2019-2023) concentrated on examining the impact of digitalisation on the future of jobs, business models, and welfare. [EUROSHIP](#) (2020-2023) was a consortium of eight countries revitalising the T.H. Marshall's (1949) ideas on social citizenship. The scope was of social rights of vulnerable groups in danger of social marginalisation and poverty. The [PILLARS](#) (2021-2023) consortium analysed labour market inclusion and social policy in a global perspective. Using forecasting scenarios, *Pillars* predicted future exposure to automation technologies, allocation of work force and technological skill mismatch. [TransEuroWorkS](#) (2022-2026) examines social insurance programmes, family and care policies and their impact upon gender equality in 29 countries. The project applies mixed-methods design including survey and field experiments, and interviews with company managers and policymakers.

In Europe, as in other regions, one consequence of digitalisation is increasing platform work. In the European Union (EU), there are approximately 30 million workers engaged in platform tasks, and most of them are self-employed (Eurofound, 2024). In most EU Member States (MS), social insurance treats dependent employees and self-employed differently. Whereas employees tend to be covered under obligatory social insurance, self-employed are often voluntarily covered (e.g., Yeates & Rice, 2020; [Spasova et. al., \(2023\)](#)). Consequently, in developed countries only 35% of platform workers have pension insurance and 17% have insurance against employment injury or unemployment (ILO, 2023). ILO has extensively studied social protection for platform workers (see [ILO, 2025](#)). Also [Eurofound](#) (2008; 2024 and 2025) continuously follows and studies working conditions and social security and reports on them. In particular, immigrants who do not have permanent resident visas are highly dependent on their employers in particularly those employed as domestic workers are in vulnerable position (e.g., [Ghailani et al., 2024](#)).

There is a number of EU-funded consortia focussing on the growing phenomenon of platform employment. For example: [REsPecTMe](#) (ERC, 2019-2025) scrutinises different forms of precarious work and relationships between paid versus unpaid work when discussing precariousness. [PLABOR](#) (ERC, 2018-2023) emphasised that while trying to bring more platform workers under the same social policy schemes as employees, there are needs to improve social rights for solo self-employed workers. [SHARE](#) (ERC, 2017-2023) links national policies to discussion of path-dependencies in social policy and how the institutional stickiness induces national legislators to adopt distinct strategies producing path-dependent consequences on both social protection and collective bargaining.

Eurostat provides a considerable amount of useful statistics on various aspects of self-employment and there are comparative EU-level analyses on their social protection ([Spasova et al., 2017](#)).

In contrast to many dooms-day projections, most EU-funded projects portray digitalisation as a facilitator to improve productivity in the economy and services ([European Social Observatory, 2023](#)). Digital services are particularly important in large and sparsely populated areas where distances to services are long. In that sense, digitalisation facilitates access to services and effectively combats transport poverty. For example [HECAT](#) (2020-2023) developed tools for better digital-based employment services by improving AI-based profiling and job matching devices. [NADINE](#) (2018-2021) in turn, developed a platform to assess migrants' skills as well as the needs of host societies to provide smooth and intercultural labour integration.

Despite the positive future orientation, the projects also list problems. There are predictions that new forms of production and changes in the formation of income, as well as changes in the capital-labour nexus, create new uncertainties and precariousness. For example, the [TECHNEQUALITY](#) project (2019-2021) estimated that up to 44% of all jobs in Europe could be replaced by automation. The digital economy may also pose problems for financing social insurance. It is not possible to collect payroll taxes on robots. Furthermore, it is increasingly common that the place of production does not coincide with the place where the value of production is taxed. A sub-project under the TECHNEQUALITY showed that economic effects of automation are heterogeneous across different groups of countries and different regions. Thus, there is not only one trajectory but different trajectories depending on institutional circumstance.

For the proponents of Universal Basic Income (UBI), UBI is a solution to uncertainties created by the new mode of production (Standing, 2017 and 2019; Parijs & Vanderborght, 2017). UBI was on the agenda in TECHNEQUALITY and Beyond4.0 consortia. They evaluated results from randomised UBI experiments in Finland ([Kangas et al., 2021](#); [Hiilamo, 2022](#)) and the Netherlands ([Somers et al., 2021](#)). The conclusion from both projects was that UBI is not a hand Swiss army knife solving the problems, and recommendations were geared toward the participatory income proposed by Anthony Atkinson (2015) and the social investment approach rather than a pure UBI as such.

Social investment with its emphasis on social services may have more ramifications for countries with stronger reliance in income transfers than social services (e.g., [The future of social protection and of the welfare state in the EU](#)). The question was also dealt with in [InnoSI](#) (2015-2017) that evaluated approaches to social welfare reforms at a regional and local levels. Returns and benefits from social investments are specifically in the focus [WellSire](#) (ERC, 2020-2025). In order to reach those returns from social investments, three complementary policy functions must be in place: the stock of human capital; labour market and family life-course transitions; and inclusive social protection.

Most of the consortia used existing statistical databases at different analytical levels: welfare regimes, countries, regions, branches of industry, enterprises and individuals and their interactions. Some consortia also aimed to produce new databases, as [*TECHNEQUALITY*](#) on [*automation and taxation, national and regional automation*](#) and [*occupations or Beyond4.0 on skills needed in future labour markets*](#). Both projects also analysed data from large randomised experiments and applied counterfactual experimentation by imputing different (un)employment scenarios into the register data mimicking the “black swans” approach of the impact of sudden, unexpected shocks encountering the system as discussed by Nassim Taleb (2007/2010; see also Diamond, 2005).

Relevant databases on digitalisation and social protection:

- Eurofound (2024): [Digitalisation](#); Eurofound (2021): [Sharing Economy Council \(Initiative\), Record number 2874, Platform Economy Database; Digitalisation in Europe – 2024 edition](#).

Generosity and coverage of social protection:

- [Social Policy Indicators Data Base \(SPIN\); The Comparative Welfare Entitlements Dataset \(CWED\); European system of integrated social protection statistics — ESSPROS; Social Expenditure Database \(SOCX\)](#).

3.2. Demography and the stability of the welfare state

All European populations are ageing, which will simultaneously increase age-dependent social expenditure—especially on pensions and long-term care—and create a labour shortage. Thus, there are significant economic and fiscal implications. According to JSTOR 2015 to 2024 there were about 3,200 publications on the search ‘aging’ AND ‘social policy’ of which mainly were from Sociology, Political Science, and Economics main journal being *Annual Review of Sociology*, *American Journal of Sociology*, *Social Forces*, *the Journal of Economic Perspectives*, *Political Science Quarterly*, *The American Political Science Review*, *British Journal of Political Science*.

Demographic changes have their impacts on the life-cycle balance and expanding the life-cycle deficit which is based on generational differences in consumption needs and earning capacity (see [NTA](#)). The life-cycle deficit has important ramifications for the stability of the welfare state, whether the question is income transfers or services (OECD, 2024a, Spassova & Ward, 2019 and European Commission, 2024a).

Revenue sources vary between social policy programmes. Most of all, the demography will cause challenges for pension. A balance must be sought between basic security versus income security, funded versus pay-as-you-go (PAYG) schemes and statutory pension versus contractual and individual

insurance policies. Furthermore, there can be more or less automatic balancing mechanisms that take into account economic growth, wage development, and cohort-specific life expectancy. In such cases, pension benefits differ from cohort to cohort. (Barslund, 2020; European Commission, 2024b). If the cuts in legislated pensions will be substantial, non-statutory pension provisions (functional equivalents to legislated pensions, see Section 3.3 below) will grow in importance.

Needless to say, all welfare states must adapt to demographic changes, and regardless of the method of financing—whether based on taxes or social security contributions—maintaining the functions of the welfare state demands a high level of employment and longer working careers (Walker, 2019; [NTA](#)). High employment rates among men and women is a precondition for a stable welfare state and low level of poverty (e.g., Gornick & Jäntti, 2012).

The relationship between the institutional set up of the welfare state and female employment is vividly discusses issue in the social and humanistic research (see Daly et al., 2023). There are significant welfare regime-specific differences in female employment whether the questions is native-born women or women with immigrant status. While previously many studies were based on cross-sectional, or in the best case, on quasi-cohort inspections, better databases allow longitudinal panel analyses. Databases such as:

- [SHARE; EU-SILCK, EU statistics on income and living conditions; LIS, Luxembourg Income and Wealth Study](#). There also are some large-scale national databases on living conditions, such as:
- [German SOEP - Socio-Economic Panel; UKHLS, Understanding Society, the UK Household Longitudinal Study; LNU, Level of living \(LNU\); SWEOLD, The Swedish Panel Study of Living Conditions of the Oldest Old](#).

Consequently, there is a growing number of comparative studies utilising panel databases, allowing to take a life course perspective (for example, Eurofound, 2008; Daly et al., 2023; Blundell et al., 2021; the EU programme [Dynamics of inequalities across the life-course](#)).

The population growth in Europe is conditioned by immigration. Therefore, employment also among immigrants is an important factor in improving the stability of the European welfare states. Migration has enchanted a substantial number of EU-funded research. For example: [MigrantLife](#) (ERC, 2019-2025); [DYMOLAMO](#) (ERC, 2018-2025); [MYMOVE](#) (ERC, 2019-2024); [MiLifeStatus](#) (ERC, 201-2021) and [IMMIGINTEGR](#) (2018-2022). Migration also can change the stability of the support for the welfare state as discusses in Section 4.

In order to obtain a sustainable welfare state, employment rate should be high also among older population groups. This is clearly stated in the [European Commission Demography Action Toolbox](#) (2023). Most MS have introduced

flexible retirement options, allowing older people to work longer. (Spasova & Deruelle, 2024). There also is a couple of EU-funded research consortia studying age-related phenomena among older Europeans. One important comparative research endeavour is [SHARE COHESION](#) that studies and collects data on consequences of population ageing for the European welfare states.

Not only does the ageing population impact the stability of the welfare state, but processes linked to family formation as well as the regional concentration of the population in larger cities. Modernisation processes have in many ways changed family structures. Changing family formations and its consequences have attracted a vast amount of research. JSTOR search 'family' AND 'welfare state' lists close to 20,000 articles or book(s) chapters, from Sociology, followed by History and Political Science published in journals like *Journal of Marriage and Family*, *Family Relations*, *Journal of Social History*.

There also is a sheer number of EU - funded research project on the topics, such as: [DEMFA](#) (ERC, 2023-2028), on historical patterns on family formation in Western Europe, Central Eastern Europe, and South Asia; [KINMATRIX](#) (ERC, 2020-2025) collecting data on 10,000 families in Denmark, Finland, Germany, Italy, Netherlands, Norway, Poland, Sweden, United Kingdom, United States; [FamilyComplexity](#) (ERC, 2015-2021) concentrating on reproduction and solidarity; [LGBTQ](#) (MSCA, 2016-2022) and [MobileKids](#) (ERC, 2016-2022) in Belgium, France and Italy. One additional characteristic in demographic change is the increase in one-person households. Since poverty is more common in one-person households than in other types of households, the picture of poverty is greatly dependent on the household structure, not only on the level and characteristics of social protection (see: [Ahonen & Kuivalainen, 2024](#)).

According to the European Commission (2023), disparities between geographic areas are increasing within and between MS. Some regions are experiencing a vicious cycle of population ageing, job disappearance and outward migration. The risk is that access to essential services will decrease and people will face transport poverty, where distances to access services such as medical treatment are long and expensive, and service poverty, where essential services are not available (European Commission, 2023 and Babbista & Marlier, 2020).

There are hopes that digitalisation would improve the situation, and actually there are some good experiences to support this. For example, remote medicine and remote access to various public services have brought those services closer to people living in remote areas without local services available. [SHAPES](#) (2019-2023) aimed to create a European ecosystem enabling deployment of digital solutions for supporting older individuals who are facing permanently or temporarily reduced functionality and capabilities; [ICT4life](#) (2016-2018) developed user-friendly ICT tools for long-term ill and elderly to increase their autonomy at home.

However, despite of its rapidly developing potentialities, as displayed in the projects described above, digitalisation is at best a partial solution. Digitalisation does not replace the hands needed for example in home care or in long-term services. Furthermore, not all people are able to use digital devices in banking, social and health care services. Measures to support people with specific needs have not been sufficient, and people without necessary digital skills are suffering from poverty of agency.

3.3. The stability of the welfare state and its functional equivalents

There are multiple ways to produce welfare, and statutory social policy is only one of them (Titmuss 1974). In addition to direct involvement in welfare production, the state can subsidise other forms of social policy through fiscal incentives (fiscal welfare), for example by providing tax rebates (Greve, 2017; Seelkopf & Starkle, 2019). Wealth and assets are an increasingly important part of people's economic safety net. The relative role of these different elements has varied over time, and in present time it greatly varies between MS and welfare regimes (OECD, 2024; Morel, 2025).

Fiscal limitations and labour shortages in the long-term care (LTC) sector represent a common challenge, and almost all Member States face problems with having a sufficient number of workers in the LTC sector ([Pavolini & Marlier, 2024](#)). This in turn, increases needs to find informal care solutions when the care of an elderly, disabled or sick person falls to be a responsibility of a relative or other close person. This process may bring back traditional gendered family and care roles but the question is not only about gender but about the interaction of gender, class and ethnicity. As Conlon et al., (2014) show, where care tends to be privatised in particular women in low-income and low-socio-economic groups tend to most relied on caring for responsibilities. However, there are substantial welfare regime specific differences (Kangas et al., 2020).

In feminist studies, the shifts in care responsibilities are described by two contrasting terms: *defamilialisation* and *refamilialisation* linked to the process of transferring care responsibilities from families to the state or other institutions and other way round. There are quite a few EU-funded projects on the theme such as: [ENTWINE](#) (2018-2023) delving into the caregiving challenges by utilising longitudinal cohort study; [MenWomanCare](#) (ERC, 2015-2020) on the masculine formal medical authority versus of formal and institutional care-giving with the feminine associations; [CareWork](#) (2021-2024) and [GenTime](#) (ERC, 2018-2027) analyses trajectories of unpaid work in different welfare regimes, and differences between men and women in the amount of time they spend on daily activities and their daily life schedules (see also Kilkey et al., 2016).

3.4. The effectiveness of the welfare system

The effectiveness of the welfare state is a complex issue that can be operationalised and quantified in many ways. We will take the straightforward approach and focus on mitigating of income inequalities, poverty and social exclusion. The topic of effectiveness is widely discussed and debated in social sciences. The search “effectiveness of the welfare state” in JSTOR gives 8,300 matches, of which Economics dominates followed by Political Science and Sociology. The main journals contributing to the discussion were *American Journal of Sociology*, *Social Forces*, *Comparative Politics*, *The American Economic Review* and *Journal of Labor Economic*.

The positive impacts of social protection on reducing poverty and inequality are well evidenced (Atkinson & Bourguignon, 2014; [Social Protection System Review](#); [Society at a Glance 2024](#); [OECD: Income Inequality database](#); see also Jefferson, 2012; Olafsson et al., 2019; Agostino et al., 2020; Gornick & Smeeding, 2000; Gornick, 2020; [Milotay et al., 2022](#); Eurostat data [At-risk-of-poverty rate before social transfers by sex - EU-SILC survey](#) and [People at risk of poverty after social transfers](#). There also is a tendency that redistribution has increased in response to the rise in market inequalities (Kenworthy & Pontusson, 2005).

It is also important to disentangle target effectiveness and final outcome effectiveness from each other. In their “Paradox of Redistribution,” Korpi and Palme (1998) showed that the more countries target welfare resources exclusively at the poor (target effectiveness), the less redistribution is actually achieved and the less income inequality and poverty are reduced (outcome effectiveness). Thus, policies and politics behind the regime matter (Gugushvili & Laenen, 2021). Furthermore, it is important to keep in mind the impact of social services. For instance, Verbist et al. (2012) show that publicly provided in-kind benefits have direct redistributive impacts (see also Vaalavuo 2020). This aspect is in the central focus in the social investment paradigm.

Benefits in cash and care are particularly important for individuals in vulnerable positions, such as children. Most of the projects on children are based on different aspects of [the EU Strategy on the Rights of the Child](#) or on [the European Child Guarantee](#) (ECG) such as [ExpPov](#) (ERC, 2022-2027) and [YouCDF](#) (2023-2025) concentrating on children’s health and access to essential services [PCPP](#) (2020-2025). National reports on ECG are summarised in Babtista et al., 2023 (see also Babtista et al., 2020). The summary concludes that in almost all MS there are mechanisms in place at least to some extent comply with the ECG, but the effective access is a challenge. Similarly, we can evaluate the effectiveness of health and long-term care (LTC) systems in Europe by examining the proportion of individuals reporting unmet medical needs or a lack of required help services in the case of functional incapacities (Eurostat, 2024; Baeten et al., 2018; and [European Commission, 2021](#)).

Analyses of the effectiveness of the welfare state should not be limited to ameliorating social grievances. The welfare state also has significant effects in establishing just and trustworthy institutions (e.g., Goodin, 1988; Rothstein, 1998 and 2011; Nussbaum, 2011). Thus, there are outcomes that go far beyond the conventional tasks. This aspect of the welfare state is studied e.g., in [INVOLVE](#) (2023-2026) aiming to demonstrate that inclusive services are necessary not only to create a more equal society, but also for a more supported society. Trustworthy institutions create trustworthy people (Rothstein, 1999). Those institutions that treat people with decency and effectively protect them against social risks enhance trust, strengthen self-confidence, dignity and fortify their capacity-building (Margolit, 1998; Kangas et al., 2021).

4. Drivers of inequalities

Inequality can be defined very narrowly, only including income and income differences, or it can encompass all possible spheres of life where we encounter unequal outcomes and processes (Therborn, 2013; Atkinson, 2015; Molander, 2016 and 2022). There was a specific call in the [NORFACE DIAL programme](#) (2016-2022) to co-fund comparative, research on the dynamics of inequalities in social, cultural, economic and political dimensions.

4.1. Income inequality

Regarding income inequalities – which is often said to be the root of all other inequalities – consequences of widening income gaps are manifold, mediated through complex stratification processes where the hypothetical primary causal effect, i.e., income inequality, is deeply intertwined with gender, ethnicity, and outcome factors such as education, social class, health and multiple forms of discrimination (for a fuller discussion, see [OECD \(2011\): Divided We Stand](#); Stiglitz, 2012; Jefferson, 2012; Salverda et al., 2014; Atkinson, 2015; Molander, 2022; Huber & Stephens, 2024).

Given the centrality of the topics, there has been surprisingly little studies around the theme JSTOR found “only” 10,230 matches for “causes of economic inequality”, of which majority were from Sociology, followed by Economics and Political Science. Main journal comprised of *Annual Review of Sociology*, *The Journal of Politics*, *the American Economic Review*, *American Journal of Sociology*. Although CORDIS finds 450 results for 'causes' AND 'of' AND 'economic' AND 'inequality,' there were only a very limited number of studies on the topic. In contrast, for 'economic' AND 'inequality,' CORDIS produced as many as 10,810 results but almost all of these dealt with the consequences of growing economic inequality and its consequences rather than the causes of its growth.

- Important comparative databases include for example: [EU SILCK](#); [Luxembourg Income and Wealth Study](#); [World Inequality Database](#); and [OECD Income and Wealth Data Bases](#).

Historically, when there are technological advancements and the economy grows rapidly, income inequality tends to first increase and then decrease, forming an inverted U-shape, known as the 'Kuznets curve'. Kuznets (1955) argued that in the early stages of economic growth, income inequality tends to rise because the benefits of growth are not evenly distributed. However, as a country continues to develop, the benefits of growth become more widespread, leading to a reduction in income inequality. The Kuznets curve explains some of the fluctuations in income inequalities but not all. Distributional policies matter (Nolan et al., 2019; Aaberge & Bengtson, 2023).

Following Kuznets' ideas Piketty (2014) argues that the emergence of high- and low-income sectors and capitalisation of production will expand factor income differences. If welfare policies (i.e., taxation, income transfers and social services) do not counterbalance this hollowing out of the middle process, both pre- and post-income differences will inevitably expand.

Wealth is much more unequally distributed than income. In the late 2010s, the share of top 10% of households' disposable income was about 25%, whereas the top 10% took about 50% of households' net wealth (OECD, 2024, p. 87). Actually, in many countries, the process of expanding the income gap is fortified by separating tax on work income and tax on capital from each other (Tuomala, 2019; Iacon & Palagi, 2000). The tax on work income being higher than tax on capital income or income from other forms of wealth whose share is increasing (Fisher & Strauss, 2021).

One aspect of this process is the expansion of functional equivalents. These alternatives to statutory social policy counteract the equalisation effect of progressive taxation and social transfers (Nolan et al., 2014). Occupational and private schemes and fiscal welfare are more likely to benefit the upper echelons of society than poorer population groups, which are more dependent on (diminishing) statutory social benefits. The refamilialisation of care work is likely to expand unpaid work among women in general and working-class women in particular (Conlon et al., 2014), which in turn, will be reflected in lower lifetime income and lower pension provisions (European Commission, 2024b).

4.2. Inequality in health

Health is one of the most important resources or capabilities in our lives, and inequalities in health lead to inequalities in other aspects of life. Inequality in health refers to systematic differences in health between social groups with different social positions. Life expectancy and mortality rates vary among different social groups, individuals with lower levels of education have shorter life

expectancy and higher mortality rates compared to those with higher education levels. Women still tend to live longer than men on average but often have poorer health in many respects. Children's health is influenced by family background, and their early life experiences – even before their birth -- have a significant impact on development and health later in life. There are also geographical differences in health (SOU, 2016).

Investments in health promotion are of utmost importance. Needless to say, health care services are important, but they are not enough. The area is well-studied but ever-green: JSTOR search “inequality AND health” ended in 17,800 hits, again mainly from Sociology, Political Science and Economics, and main journals were *Annual Review of Sociology*, *Journal of Health and Social Behavior*, *the European Journal of Health Economics*, *American Journal of Sociology*, *the Lancet* and *British Journal Of Medical and Health Research*.

The main message is that excess mortality and morbidity are associated with economic inequality (Muillainathan & Shafir, 2013). Inequalities in health are rooted in the institutional structures of society and many other dimensions of inequality (see also Kawachi & Kennedy, 2002; Marmot, 2004 and 2015; Wilkinson & Pickett, 2006 and 2009; Fritzell & al., 2013; Therborn, 2013; Molander, 2022).

In order to give children a good start they must have access to affordable and good-quality health and dental care. EU commissioned a study on the [Feasibility study for a child guarantee](#) to map to what extent children in a vulnerable situation have access to free healthcare, free education, free childcare, decent housing and adequate nutrition (Frazer & al. 2020; Molander, 2022). [Fritzell et al. \(2013\)](#) showed that child-specific poverty rates across countries and time have impact on child mortality rate.

There has been a wider interest in the EU to analyse health differences and the determinants of health inequalities. CORDIS produced 425 results for 'causes' AND 'of' AND 'health' AND 'inequalities'. The research programme [SOCIAL CHALLENGES](#) called for projects to analyse determinants of health and measures to improve the lifelong health status of Europeans. The research programme [Innovative actions for improving urban health and wellbeing - addressing environment, climate and socioeconomic factors](#), in turn, offered funding to six projects (ending in 2025) that, from different research angles, delved into actions and/or policies to improve urban health and well-being, also addressing health inequalities and environmental aspects as drivers of health inequalities. For example: [URBANOME](#) (2021-2025) focuses on environmental factors affecting health. The neighbourhood effects have been analysed also elsewhere e.g., [Health at a Glance: Europe 2024](#); Jivraj et al., 2020). Furthermore, as shown by the [European Environment Agency \(2024\)](#), impact of climate change are not equally distributed across the MS nor across different population groups: like low-income people, the elderly, and children, have a much

higher chance of suffering the consequences of an unhealthy environment and climate change.

Not only the environment where people are living, or education, income, ethnicity, behaviour and different interactions of these factors contribute to health inequalities, but many health problems are hereditary. [The MapIneq](#) (2022-2025) studies how various socioeconomic conditions, policy, societal changes and changes over the life course affect inequalities across these domains. It will also create a huge database. These issues are on the fore also in [HEALTHINEQ](#) (ERC, 2021-2026) that will introduce genetics into the analyses.

People with health problems sooner or later contact the health care system. The characteristics of the health care system itself may be a major driver of health inequalities ([European Social Observatory, 2024](#)). Insurance-based health care may be more limited and exclusive than universal national health care systems that at least in principle provide health care access to all citizens, or to all legal residents and sometimes also to all residents. [Baeten & al. \(2020\)](#) concludes that whereas there is an improvement in access to health care, inequalities in access, both between and within countries persist. In particular, vulnerable groups face multiple hurdles and therefore do not obtain the care they need.

There also are good and important comparative databases, such as: [EU-SILCK](#); [European Health Interview Survey \(EHIS\)](#); [OECD Health Statistics](#); [Health at a Glance: Europe 2024](#) and [SHARE](#). In addition, there are many national longitudinal databases. Combining registers on individuals' demographic, socio-economic, and neighbourhood characteristics with information from national socio-political institutions and survey data allows for better evaluation of links and causal effects between determinants of ill-health and inequalities in health. Furthermore, there are databased that allow researchers to combine data on genes with the above described data and to study interactions between hereditary characteristics and other factors in shaping differences in health. There is a growing number of such studies showing that while some factors are epigenetic and irreversible the development of the individual in general and their health in particular is a result of a complex interplay between genes and the environment (Molander 2022, pp. 35-58).

In their comparative study on the relationship between health inequalities and social policy systems, Lundberg et al. (2008) concluded that “the ways that social policies are designed, as well as their generosity, are important for health. Hence, social policies are of major importance in how we are able to tackle the social determinants of health.” Thus, social policy programs, whether they are services or social transfer systems, are important for health because they increase the resources that individuals have under their control.

4.3. Inequalities in education

The cognitive and formal qualifications acquired during childhood and youth are intended to meet skill demands in the labour market, where returns are also given a monetary form in terms of revenue to the exchequer and various insurance and saving schemes. Later, lifelong learning in the workplace provides skills to adapt to changes in the labour market, whether it be new skills required by digital transformation or skills needed for other reasons to avoid marginalization. The views comply with the social investment paradigm (see Morel et al. 2012; Hemerijck, 2015 and 2017; Huber & Stephe, 2024, pp. 129-140).

It is hoped that formal education will offer equal opportunities for all children. However, national educational systems produce different outcomes in terms of social stratification ([Erola & Kilpi-Jakonen, 2017](#)). Social stratification is a widely studied field, and there is a huge number of research on the generational transmission of advantages—be they education, skills and knowledge, income, wealth, social capital, or whatever—from parents to their children. A search “inequality in education” in JSTOR produced almost 22,000 hits of which almost half from Sociology, followed by Political Science and Economics. The most influential forums were the *American Journal of Sociology*, *Social Forces*, *American Political Review*, and *Sociology of Education*. See also Erikson & Goldthorpe (1992), Erikson & Jonsson (1996), Corak (2013) and Kalter et. al. (2019). The influential databases on education results are [PISA](#) and [TIMSS](#).

Inequality in education has attracted attention also in research projects funded by the EU. Cordis search for 'inequality' AND 'in' AND 'education' produced 6,748 results. There has been a number of research programmes as the [NORFACE DIAL programme](#) (2016-2022) discussed above. There has been and still are a sheer number of studies delving into the issue of intergenerational transmission of (dis)advantages in education such as: [DetEdIn](#) (2018-2020) emphasising the child's right to education on the basis of equal opportunity; [LEARN](#) (2023-2027) seeking to explain how socio-economic status, gender, ethnic and migrant status are associated with inequalities over the life-course; [MapIneq](#) (2022-2025) focusing on drivers of intergenerational, educational, labour market and health inequalities over the life course, [PIONEERED](#) (2021-2024) delving into intersectional inequalities in access to, uptake and completion of education, both in formal and informal educational settings; [ISTOS](#) (2017-2019) that concentrated on vulnerable children and [FATHERCHILD](#) (ERC, 2018-2022) that scrutinized in what ways fathers influence their children's social, behavioural, emotional, and cognitive outcomes.

Formal education is a necessary but not sufficient condition for meeting the skill demands of the digital society and tackling all the inequalities this transformation will generate ([Cedefop, 2020](#)). Lifelong learning is seen as a solution to help enterprises cope and, on the other hand, to help individuals accumulate their skills to successfully engage with the labour market in a rapidly changing society ([OECD, 2021](#)). A problem is the accumulation of advantage: those with higher

skill levels are the most likely to be involved in lifelong learning. Thus, skill gaps will expand. Therefore, there is a need to study effective ways to also encourage low-skilled employees to utilise opportunities for lifelong learning ([Beyond4.0 WP6](#); Kangas et al., 2022).

4.4. Gender-related inequalities

Gender-related inequalities have generated a substantial amount of studies as indicated by JSTOR search on (inequality) AND (gender): there were 18,500 hits of which half was from Sociology followed by Political Science and History, and the most influential publications were *the American Sociological Review*, *Social Forces*, *Gender and Society*, *Annual Review of Sociology*, *the American Economic Review*.

The themes in these publications were related to differences in employment, wage formation and income inequality, different opportunities to participate in paid labour, the glass ceiling, and the intersection of gender, race, ethnicity and stratification from an intersectional perspective, including Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ) individuals. They also covered care responsibilities and time use and account for “child penalties” i.e., how much mothers loose in their life-time income compared with males and women without children.

The same themes are visible in the EU-funded research projects. As did JSTOR also CORDIS displayed a rather many (7,952) results for 'inequality' AND 'gender'. The projects financed by the EU-funds study drivers of gender-related inequalities from different angles: [GENEQUALITY](#) (ERC, 2021-2026) focussing on the “child penalties” in terms of labour market outcomes; [CIC](#) (ERC, 2017-2022) studied female career choices and priorities related to work-life balance; [GenTime](#) (ERC, 2018-2027) is on inequalities in time use; [Struct. vs. Individ](#) (ERC, 2017-2025) concentrates on the countervailing processes of women’s (individual) upward occupational mobility versus women’s (collective) effect on occupational pay in Sweden, Germany, Spain and the United States; [LGBTQ Parenthood](#) (2021-2024).

One important theme in both the JSTOR and CORDIS listed projects is women's employment careers, the breaks in these careers, and the penalties these breaks cause in career development, work income, and ultimately pensions. There are differences between countries in how social policy programs try to compensate for the "child penalty" and counterbalance its detrimental impact on pensions. According to the EU Pension Adequacy Report, women in the EU-27 receive, on average, 26.1% lower pension income than men, and 5.3% of women receive no pension at all. These gaps stem from gender pay differences, shorter or interrupted careers, and more part-time work (European Commission, 2024b; see also Section 5).

Important data sources:

- OECD: [Society at a Glance: OECD Social Indicators](#); OECD: [Gender data portal](#); European Institute for Gender Equality: [Gender Equality Index](#); World Economic Forum: [Global Gender Gap Report 2024](#).

Results from all the research indicate that gender is much more than just the traditional dichotomy between men and women. Gender issues impact all our lives, and the very concept of gender is being re-examined and redefined. Inequalities related to gender, as well as their drivers, are multifaceted and intertwined with most other social inequalities. Increased access to longitudinal and individual-based databases give better possibilities to study these interactions more reliably.

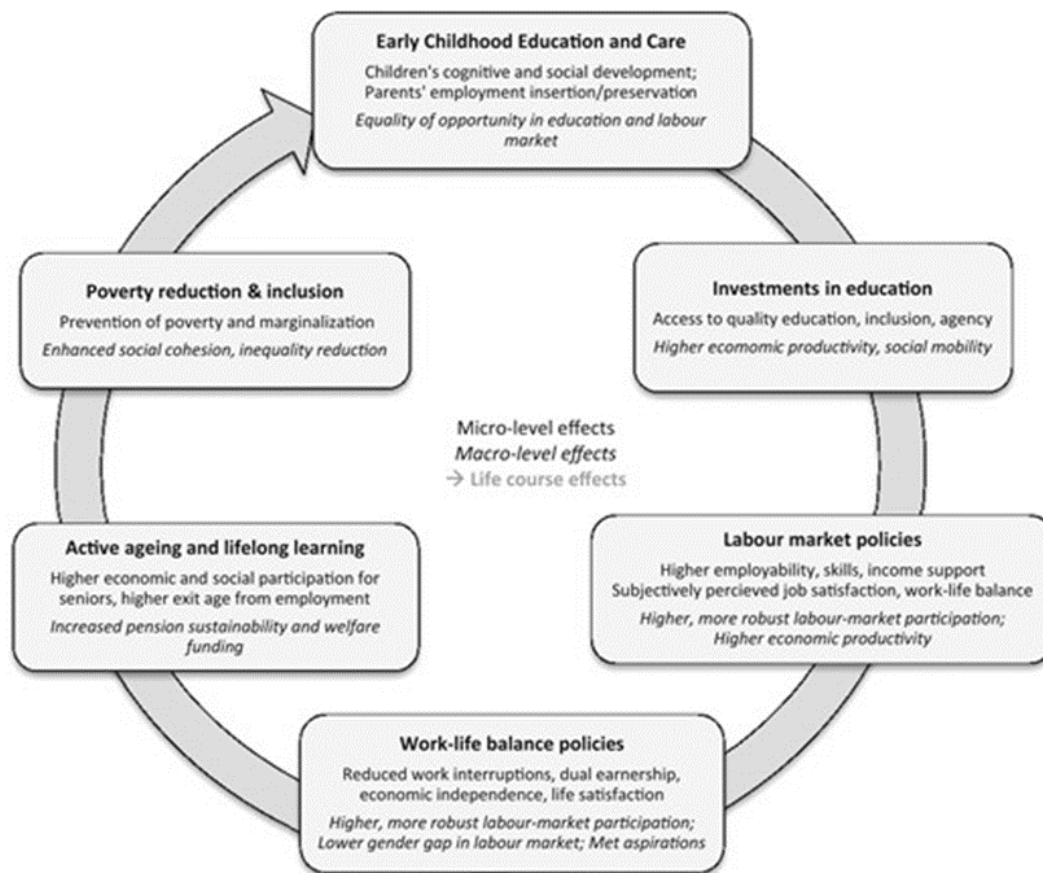
4.5. Shooting at a moving target: new forms of poverty

The historical construction of the welfare state has been a constant adaptation to new risks and correcting market failures. In that sense, creating the welfare state has been like shooting at a moving target. That target has moved slower or faster depending on the historical situation at hand.

The [European Pillar of Social Rights](#) (EPSR) states that “everyone has the right to access essential services of good quality, including water, sanitation, energy, transport, financial services and digital communications. Support for access to such services shall be available for those in need”. Failures in access to those essential services leads to new forms of poverty (“transport poverty”, “energy poverty” etc., Babtista et al., 2020). Furthermore, digitalisation of various services poses a challenge for low-income and low-education groups without the necessary skills to navigate in the digital service world. We can speak about poverty of agency linked to capabilities (Nussbaum, 2011; Sen, 1992; 1999 and 2010). Poverty in agency pertains to situations where people do not have the physical devices, or the skills, to be active participants in their own lives and in the digital society in which they live. Taking into account all these changes combatting poverty is like a shooting at a constantly moving target.

The social investment approach tries to solve this moving target problem (see Figure 1). The theory argues that investments in human capital provide long-term returns (e.g., Morel et al., 2012; Hemerijck, 2015 and 2017; Hemerijck & Matsaganis, 2024). The central idea is that the welfare state can accumulate human capital stocks over the life course by affecting work–life balance, gendered labour markets, and guaranteeing decent social protection to all (Molander, 2022). The sequential dimensions depicted in Figure 1 form a virtuous cycle, where various aspects of social policy functions mutually reinforce each other, leading to cumulative returns that contribute to improvements at both the individual and societal levels (cf. discussion on enabling state in Section 11.4.).

Figure 1. The virtuous cycle of social investments.



Source: Hemerick et al., 2024, p.16.

All those aspect depicted in Figure 1 and their interactions will enlarge expectations towards the welfare system. Research and evidence-based policy-making must also be able to adapt to constantly moving circumstances and flexibly follow where the target is moving.

5. Changing welfare expectations and norms

In 1993, Francis Fukuyama predicted the end of history, asserting that ideological evolution had reached a point where Western liberal democracy and its value bases had been universalised. He could not have been more wrong! The number of democratic nations is diminishing, regressive regimes are gaining ground worldwide, and more conservative and authoritarian and conservative winds are sweeping also over Fukuyama's own country. The same applies to Europe. In their book *Cultural Backlash* (2019), Pippa Norris and Ronald Inglehart describe how authoritarian-populist parties are successfully rallying on nationalistic agendas and conservative social values (see also Norris, 2005; Mudde, 2007).

In analyses of changes in value orientations, it is common to speak about different generations (e.g., Interwar cohorts, Baby Boomers, Generation X, Millennials), each having its own generational experiences and, hence, its own policy priorities. In addition to authoritarian populist movements, Norris and Inglehart also disentangle a shift from material values towards post-materialism, where individuals are more tolerant and more interested in protecting individual freedoms. Thus, the modernisation process bifurcates into two opposing world views: the conservative-authoritarian and green-left liberal camps.

Supporters of these two highly different value orientations come from different cohorts and different socio-economic strata. Partially the cleavage is also gender-based. These differences aside, there is one common underpinning of these two seemingly contradictory orientations. Both demand recognition of their identities, dignity (Frazer & Honneth, 2003). Regarding Generation X and Millennials, they strive for the welfare state to recognise their different identities that possibly deviate from the traditional ones. Instead of the old politics of economic redistribution, the new identity politics could be called the "politics of resentment" (Fukuyama, 2019). In the case of the authoritarian camps, the politics of resentment is linked to increased economic inequality, insecurity amidst modernisation and multiculturalism, and loss of status (Norris, 2005; cf. Bell, [1963 (2001)]). The politics of resentment is the voice of those forgotten people seeking to be heard and recognised. In the case of social policy, recognition means that the institution in question acknowledges clients as autonomous agents and takes their claims seriously and recognises the people (Kangas et al., 2021). These ideas are analysed also in a number of EU-funded projects.

Lots of opinion studies analyse the level of support for the welfare state, legitimacy of different welfare programmes, values, beliefs linked to them and change of norms related to the behaviour and utilisation of social benefits. A JSTOR search for "support for the welfare state" produced as many as 26,300 matches; "support for the European welfare state" yielded 15,300 hits and "support for the universal welfare state" gave "only" 7,600 hits. In all cases the most important publication channels were *the American Journal of Sociology*, *American Journal of Political Science*, *European Sociological Review* and *Journal of European Social Policy*.

Many publications were inspired to study whether the opinions and expectations of the welfare state align with welfare regimes or with the ethnic / cultural homogeneity of the country. Regarding welfare state regimes and the impact of immigration and expectations towards the welfare state, the results are inconclusive (Alesina & Glaser, 2006; Reeskens & van Oorschot, 2015). Poor countries with wider income inequalities display higher expectations towards redistribution (Kulin & Meuleman, 2015). Differences in welfare expectations between Europe and the U.S. can be explained by differences in the concept of welfare. Whereas "welfare" in Europe encompasses a broader range of state activities, "welfare" in the U.S. carries a negative connotation referring to social

assistance. Thus, much depends on contextual factors, national values and the type of background information provided in the survey in question.

Regarding the EU-funded research CORDIS found 625 results for 'support' AND 'for' AND 'welfare' AND 'state'. On average most of the EU projects studied the same topics as those listed in JSTOR and many publication are listed both in the JSTOR and CORDIS. [*EMERGINGWELFARE*](#) (ERC, 2017-2021) challenged the traditional welfare state typology and looked at emerging welfare regimes in Brazil, China, India, Mexico, South Africa and Turkey. [*UNI-SEL*](#) (2021-2024) based on an interesting cross-national, experimental and longitudinal data identified under which circumstances one form of social policy is more popular than the other. They showed, that universal programmes receive higher levels of public support than selective, means-tested programmes. Which indicates that universal schemes may be more stable than selective schemes (cf. Section 2). One central question for the future of the welfare state is what the priorities are during times of austerity. The issues is dealt with in [*PRIORITIES*](#) (ERC, 2017-2023).

A specific EU-funded programme [*Addressing populism and boosting civic and democratic engagement*](#) wanted to increase knowledge on populism in comparative and historical perspectives and enhance studies on medium to long-term scenarios on the consequences of populism in Europe. Three projects were funded from the programme. [*POPREBEL*](#) (2019-2022) concentrated to explain the rise of populism in Central and Eastern Europe. The starting point in the [*DEMOS*](#) (2018-2022) was that the rise of populism is linked to the cleavage how democratic polities operate and how citizens perceive their own aspirations and identities within the political system. [*Populism And Civic Engagement*](#) (2019-2022) analysed causes of the populist movements and their challenges for liberal democracy. The Norris-Inglehart type idea on cultural clashes were analysed in [*INWELCHAV*](#) (2017-2019). Their results showed that populist right-wing parties make a distinction between 'us' and 'them' pertaining to migrants, ethnic minorities, or people with alternative lifestyles, which impacts the construction and stability of welfare programs and the regulation and control of access to benefits

In social life people impose behavioural rules – norms – on each other. Social protection is not an exception. The JSTOR search “changing norms and the welfare state” found 5,700 articles and book chapters published in the last decade. CORDIS, in turn, recognised only a few research projects, most of them were either theoretical, related to norms of waste politics, world politics or scientific research. [*ASNODEV*](#) (ERC, 2016-2022) offered an interesting intervention study on the role of norms affecting “aspiration failures”, i.e., due to prevailing norms, the poor perceive certain goals as unattainable and they do not invest towards those goals, thus remaining in their poor positions. The results have wider ramifications for studies on poverty and generating persistent inequalities. Mullainathan and Safir (2013) explains that people with low-income are preoccupied with immediate needs, which, in turn, limits their ability to focus

on long-term goals and prevent them from making rational long-term decisions. This “reduction of bandwidth” leads to poor decision-making fortifying disadvantages over life cycles

Different forms of social policy generate different normative obligations for clients to gain access to the benefits. Whereas from a normative point of view, those benefits that are based on undisputable criteria (e.g., age) or on contributions are not problematic, the case for social assistance is different. The benefit is a discretionary last-resort transfer. It has often been claimed that highly targeted or selective welfare benefits generate different perceptions of benefit recipients compared with other forms of social security. Selective programmes tend to create a cleavage between the recipients and the paying majority (see, [UNI-SEL?](#)). Oftentimes, pejorative epithets are linked to the recipients; they are singled out as ‘deviant’, ‘socially inferior’, or simply ‘the others’. Existing studies (for example, those included in the JSTOR search) show that the unemployed, immigrants, and social assistance recipients are often seen as the least deserving of benefits. Differences in perceptions of deservingness are also linked to individuals’ values and political ideologies (Kallio & Kouvo, 2015). In sum, social norms imposed on recipients of social assistance and unemployment benefits are stronger than those imposed on the majority of recipients of other social security programmes. The issue is who should get what and why? ([Oorschot, 2000](#); [Oorschot et al. eds. 2017](#)).

In the wake of the authoritarian approach, traditional values tend to strengthen, which means that the caregiver roles of women will receive more emphasis. Consequently, the normative movement, which has for a long time gradually shifted towards more equal gender politics, will begin to swing back towards traditional norms in social policy and society at large. Furthermore, there are increasing demands to separate social benefits targeted to the native-born and foreign-born, and to limit access to benefits for foreign-born residents. In other words, citizenship is replacing residency as the basis for social benefits.

There is a number of opinion surveys that have been repeatedly carried out such as:

- [European Social Survey](#) (ESS); [European Value Survey](#) (EVS); [World Value Survey](#) (WVS); [International Social Survey Program](#) (ISSP); [Eurobarometer](#).

Most of them are cross-sectional, but since they repeat the same questions in successive waves, it is possible to follow changes in values and welfare expectations. Furthermore, they also allow for quasi-cohort analyses where groups that have experienced different conditions (e.g., the COVID-19 pandemic) mimicking interventions are compared to analyse how these 'quasi-interventions' impact opinions. Combining survey data, for example, with geographical data (on regions, suburbs, etc., with different population compositions, e.g.,

unemployment or immigration) opens new methodological avenues to study neighbourhood effects on opinions.

6. Linkages with social policy and employment

The issue of social policy and employment is a well-studied area of research. JSTOR lists 27,400 hits for “social policy AND employment” whereas “social policy AND work AND incentives” yielded close to 15,000 hits. The lion’s share were from Sociology, Political Science and Economics. The most influential publications were *Journal of Economic Perspectives*, *Social Forces*, *American Journal of Political Science*, *European Journal of Social Quality*, *American Journal of Economics*, *Comparative Politics*.

A search in the CORDIS system resulted in over 4,000 hits for 'social' AND 'policy' AND 'employment'. However, most of the projects and hits do not deal with social policy but focus on job security, innovation and employment, European competitiveness, immigrants and their inclusion in the labour market, etc. Most of the projects that are related to our theme were already discussed earlier. Projects such as [TECHNEQUALITY](#), [BEYOND4.0](#) and [UPLIFT](#) examine the relationships between social policy and employment within the digital transformation.

It is said that work is best guarantee against poverty. In most cases it is so, but not always. European Commission was interested to know about the characteristics and composition of in-work poverty in Europe. The Network of European Independent Social Policy Experts² wrote country reports on their respective countries. [Peña-Casas et al., \(2019\)](#) provides a summary of the individual Member State reports. The report concludes that the in-work poor represent a substantial group among workers and their numbers continue to grow in many European countries, leading to a polarisation within the EU (see also [Guio et al., 2021](#)). Similarly, [the WorkYP](#) project, is focused on the increasing social trend of working people at risk or below the poverty line.

Welfare states have a huge impact on employment, both positive and negative. The issue is widely debated and the results tend to be inconclusive, depending on the country and sector of social policy examined. Starting with the positives, the social investment paradigm emphasise that investments in education and social services enhance employment in general and employment among women

² The European Independent Social Policy Experts are part of the European Social Policy Analysis Network (ESPAN), which provides independent analysis and expertise on social protection and social inclusion policies across Europe. ESPAN supports the European Commission by monitoring progress towards EU social objectives, particularly those outlined in the European Pillar of Social Rights. The network consists of 38 country teams of independent social policy experts, covering EU Member States, candidate countries, and other European nations.

in particular (Esping-Andersen, 2009; Morel et al., 2012; Hemerijck, 2015 and 2017; [Hemerijck et al., 2023](#)). For example, the high levels of employment in the Nordic countries, are said to be consequences of the universal welfare policies that also enhance female and maternal employment.

One important aspect of the universal mode of social policy is labour mobility from one occupation or sector to another. When all sectors and enterprises are universally and equally covered by the same regulations, there are no inbuilt systemic disincentives hindering mobility, whereas sectoral and enterprise-based social security programmes, such as pensions and sickness benefits, may inhibit sectoral labour mobility. To a much greater extent, targeted and means-tested social assistance schemes create strong work disincentives. As a rule, the tapering percentage is high, often close to 100%, meaning that each earned euro diminishes assistance by one euro. ([OECD, 2024c](#)) Furthermore, there are those normative problems that are the most severe just in the case of social assistance and unemployment benefits.

The Nordic welfare states are often portrayed as “women-friendly welfare states”: the welfare system promotes gender equality and enhances female employment in contrast to many other regimes. All this said, there is a flip-side. For example, Danish Economists Nabanita Datta Gupta and Nina Smith (2006 and 2008) demonstrate that, although the 'Nordic model' has been successful in boosting female employment, it is a costly solution. Despite all family-friendly policies, long paid maternal leave has adverse effects on women's wages with consequences for gender equality. The family- and women -friendly schemes may even have created a 'system-based glass ceiling' hindering women's career progression. Similarly, [Hadas Mandel \(2010\)](#) shows that welfare state policies interact with socioeconomic position in determining women's economic rewards, tending to penalize highly skilled women while benefiting the less-skilled. The finding seems to be valid also for men (Kenworthy, 2024).

There is an abundance of studies from different welfare states showing that in some cases work does not pay properly, and in some case, work does not pay at all. One measure widely used to evaluate how much tax on labour income discourages employment is the “tax wedge”. According to the OECD (2024a), the tax wedge is the ratio between the amount of taxes paid by an average single worker without children and the corresponding total labour cost for the employer (OECD 2024a, p.23). The tax wedge for the second earner contributes to the persistence of gender disparities in labour markets (OECD, 2024a, p. 52).

A more holistic way of looking at the work (dis)incentive structures created by the welfare state is to calculate effective marginal tax rates. These calculations combine income tax, employee social contributions, payroll taxes, and consumption taxes. This indicator measures the fraction of any additional earnings that is lost to either higher taxes or lower benefits when an employed person marginally increases their working hours. Often, these calculations take into account, for example, the impacts of day-care and other possible fees that

increase due to increased income. In such cases, the effective marginal tax rate for the extra income may increase close to 100% or even higher, which is a very effective disincentive to try to find employment. (OECD, 2024a).

There are different trials to make work pay. In particular those on social assistance and those getting different forms of unemployment benefits are the target groups for such trials. In the wake of the surge of authoritarian governments, there are more moral and formal obligations set to unemployed to try to find employment. The desired effect is faster employment of jobless individuals. The problem is that, according to the OECD report '[Faces of Joblessness](#),' there are several barriers (health problems, low education, skill mismatches, age) that have nothing to do with tax-benefit incentive structures. Often those with weak labour market attachment simultaneously suffer from various employment barriers. In such cases, improving incentive structures does not help as much as desired when implementing the reforms.

7. Discussion

Great transformations always have winners and losers. In the wake of significant changes, old social institutions vanish, and new ones gradually take shape (Schumpeter, 1994 [1942]). Digitalisation is considered one of the most fundamental changes in production systems since the industrial revolution, and there is an abundance of debates on how to assist those hindmost who are most negatively affected by this development. There has been a number of EU-funded projects that specifically focused on digitalisation and its effects on social policies. Some of the projects estimated the extent of job losses due to digitalisation, while others studied changes in work qualifications and the possibilities to enhance people's knowledge and skills to respond to the rapidly changing demands of the labour markets. Despite the pervasive changes, which may make the future outlook seem gloomy, the overall message from the projects reviewed was that the process is not deterministic and it is manageable. Furthermore, in the best scenarios, digitalisation will help societies cope with other transformations, such as the shortage of labour in health and social care services, combat new forms of poverty (e.g. poverty of transportation) and will assist immigrants and people with various disabilities in integrating into society. Digitalisation will open up promising avenues for telemedicine, intelligent translation services for immigrants, and digital assistive devices for people with disabilities.

Digitalisation and platform employment have amplified calls for implementing UBI. In some countries, the COVID-19 pandemic had the same effect, particularly in those countries that had to introduce a variety of ad hoc measures to repair gaps in their safety nets. The issue of UBI was dealt with in a couple of EU-funded consortia ([Beyond4.0](#) and [TECHNEQUALITY](#)). In both projects, the conclusion was that decent basic security is a necessary condition for fulfilling the grand goals of inclusive societies. However, this is not a sufficient condition to achieve

all the goals. In addition, other measures are needed, such as available and affordable childcare, as well as well-functioning health and long-term care, continuous education, and social and employment services to support people and societies in their paths towards inclusive digital societies (cf. the social investment paradigm).

Changes in demographic and family formations causes their own challenges for the stability of the social protection. Population aging will increase age-specific social spending. More complex family forms on one hand make it harder for social policies to recognise new risks, which creates uncertainty regarding the sufficiency and suitability of social protections for non-traditional families. On the other hand, complex and unstable family relations make it more difficult for families to obtain satisfactory safety nets themselves in case the statutory safety net fails (Miho & Thévenon, 2023).

One possibility to mitigate excessive demands on the welfare state and the heavy financial burden is to utilise "functional equivalents" offered by other actors besides public authorities and new forms of public-private partnerships. Such other actors include private for-profit and non-profit companies, associations, religious organisations, and families. The flip side of this transformation would be changes in dependencies and conceptions of deservingness. From the libertarian perspective, there has been criticism against welfare dependency. However, there always will be dependencies. When responsibilities are transferred to private markets, market dependency – ultimately dependency on money – will replace the welfare state dependency. Greater responsibility placed on families will, in turn, increase the family dependency and workload of family members, particularly women, which will reinforce gender inequalities in the labour market in other spheres of life. Third sector organisations play an important role in taking care of their constituencies, but oftentimes their resources are limited, and they lack the capacity for large-scale services.

Drivers of inequality, consequences of widening income gaps – and notably so concentration of wealth – are manifold, mediated through complex stratification processes where the hypothetical primary causal effect, i.e., income inequality, is deeply intertwined with gender, ethnicity, various manifestations of discrimination and outcome factors such as educational attainment, health, social class and status. Ultimately, these factors may themselves become causal effects of other undesirable societal outcomes such as crime, distrust, and social and political alienation.

Improved longitudinal individual-based databases on family backgrounds, education, employment, and health, along with the integration of register data with survey data and possibly with data from various experimental settings, open up new avenues to study the multifaceted phenomenon of inequality.

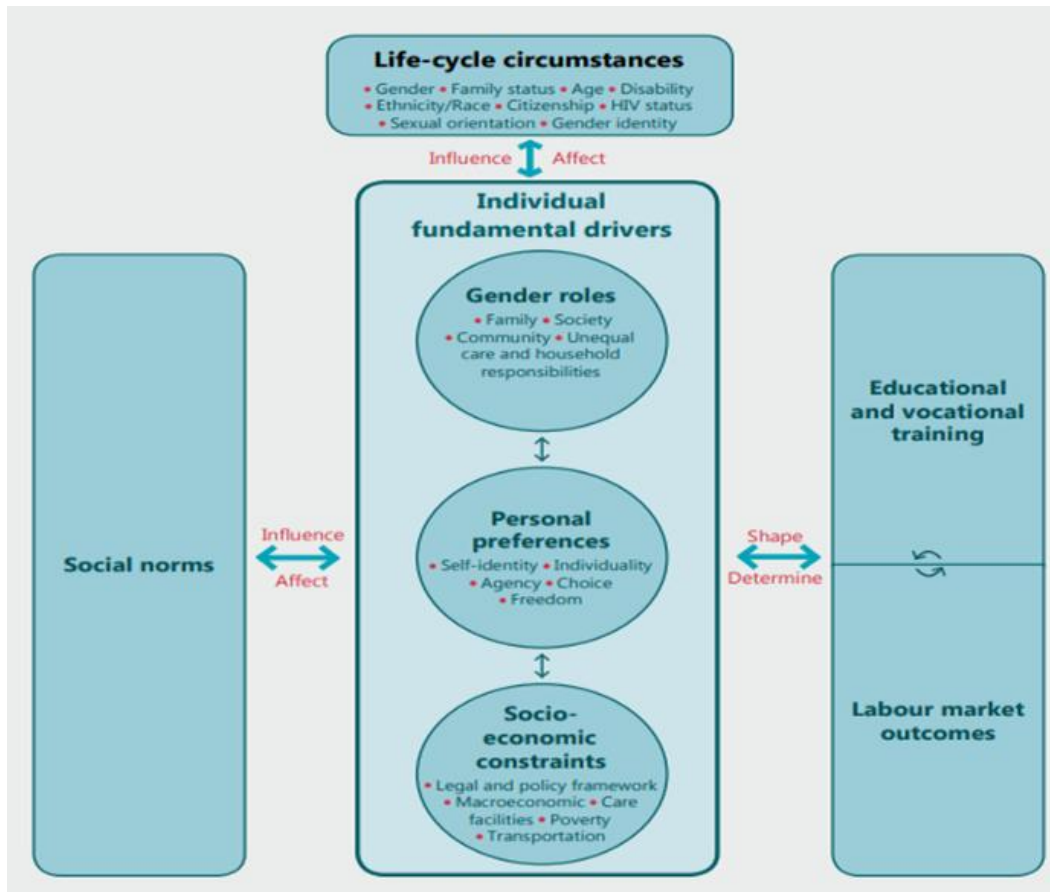
Furthermore, effectively combating inequalities demands analyses of inequality of opportunity and inequality of outcome. Often, the latter perspective is criticised

by those who believe there is de facto equality of opportunity. However, even in a fortunate case of equality of opportunity, the inspection of outcomes is not irrelevant. Inequality of outcome affects equality of opportunity for the next generation. “Today’s ex-post outcomes shape tomorrow’s playing field: the beneficiaries of inequality of outcome today can transmit an unfair advantage to their children tomorrow” (Atkinson, 2015, p. 11; see also Molander 2016 and 2022). Huber and Stephens (2024, 140) in their comparative analyses of Western countries show that a poor socioeconomic background prevents children from benefiting from their access to free education more than children coming from high-income groups. Improved longitudinal national and EU-level databases enable a more comprehensive and comparative examination of intergenerational, generational, and life course inequalities, which manifest across all spheres of life (see, for example, Karonen, 2024).

In a way, all welfare policies revolve around eliminating inequalities. A schematic presentation of the process is depicted in Figure 2. As the figure illustrates, there are individual drivers that hereditary and thus beyond our choices. The society and its welfare systems with its prevailing norms, in turn, either constrain or facilitate our possibilities. They affect how we can cope in different life-cycle circumstances. Genes, social norms and gender roles affect our preferences and educational choices and hence, our possibilities in labour market. Possibilities, in turn, are linked to our capabilities. In that respect, Martha Nussbaum’s ideas (2011) offer a fruitful starting point. The corollary in her approach is that people must be able to make rational and well-informed choices about their lives. Nussbaum defines two kinds of capabilities: i) internal capability, which pertains to the individual's own abilities (“Personal preferences” in Figure 2), and ii) combined capability, which refers to abilities related to social and political institutions and everyday practices, including employment, education, consumption, and political participation. Combined capabilities require both internal capabilities and adequate institutional arrangements. Nussbaum emphasises that it is the ultimate task of the government to create social institutions where people can utilise their capabilities and actively support skill-building. This task primarily falls within the domain of education, encompassing early childhood, basic, secondary, vocational, and university-level education.

In a rapidly changing world, this means the continuous acquisition of new skills and lifelong learning, which is a key aspect of the social investment welfare state. In line with Nussbaum, Bo Rothstein (1998, p. 54) states that the state should supply a broad range of resources, since it cannot know which resources will be critical in changing circumstances. Therefore, having a larger toolbox is preferable to having a minimal one.

Figure 2. A schematic presentation of drivers of inequality and possibilities to combat detrimental consequences by welfare policies.



Source: ILO (2017, p. 24). World Employment and Social Outlook. ILO, p.24.

Structural changes in society bring about changes in central values and, consequently, changes in demands towards welfare states and norms regulating access to benefits and obligations imposed on beneficiaries. Low-skilled workers face shrinking employment opportunities and increased insecurity. In particular, unemployed blue-collar workers with low educational attainments are prone to support the nationalistic and anti-liberal values propagated by the new right-wing parties. There are very strong linkages between perceived personal income insecurity, populist votes and authoritarian values (Norris & Inglehart 2019, 159). The correlation is much stronger among men than women.

In the populist and authoritarian right-wing agenda traditional values e.g., regarding gender roles and harsher norms against the beneficiaries of social benefits prevail. Beneficiaries are depicted as "fraudulent." Instead of carrots, sticks should be used to whip them into work. Interestingly, on the one hand their political agenda is geared against the "too lavish welfare state" that encourages idleness and attracts immigrants, which is believed to increase unemployment and social security costs. But on the other hand, there is criticism against benefits being too low, leaving people in difficult situations. The solution to these seemingly contradictory opinions is more effective targeting of benefits to those who are truly in need—the "deserving poor"—which poses a challenge for universal welfare programmes. Additionally, another solution offered is that benefits should be targeted only to native-born "us" and not foreign-born "them".

Authoritarian values and anti-immigration attitudes go hand in hand as shown by Norris and Inglehart (2019) and the studies discussed in Section 5.

The question is, what does this kind of political agenda mean for the legitimacy and stability of the welfare state in general, and the universal welfare state in particular? Therefore, opinions on the role of the welfare state, its extension, and redistributive effects are important for the legitimacy of the welfare system. The availability of repeated high-quality comparative databases provides tools for reliable comparison on the magnitude of political support versus demands to profoundly reform the welfare state.

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9. Appendix: Programmes and projects analysed³

Programmes:

[*Fostering skills development in the EU for more sustainable, resilient, and fair societies;*](#)

[*Addressing populism and boosting civic and democratic engagement;*](#)

[*NORFACE DIAL programme;*](#)

[*SOCIETAL CHALLENGES - Health, demographic change and well-being.*](#)

Projects:

[*Beyond 4.0:*](#) (2019-2023); **NL**, UK, NL, DE, FI, BG, SP.

[*EUROSHIP*](#), Closing gaps in social citizenship. New tools to foster social resilience in Europe (2020-2023): **NO**, DE, EE, ES, HU, IT, CH, BE, UK.

[*PILLARS*](#), PATHWAYS TO INCLUSIVE LABOUR MARKETS (2021-2023): **DE**, UK, FR, IT, NL (China).

[*TransEuroWorkS*](#), Transforming European Work and Social Protection: A New Proactive Welfare State Fit for the Future World of Work (2022-2026): **NL**, BE, IE, SLOVAKIA, SP, BE (CH, UK)

[*REsPecTMe*](#), Resolving Precariousness: Advancing the Theory and Measurement of Precariousness across the paid/unpaid work continuum (ERC, 2019-2025): **BE**, DE, FR, IT, NL, PL, SW, UK.

[*PLABOR*](#), Platform Labor: Digital transformations of work and livelihood in post-welfare societies (ERC, 2018-2023): **NL**.

[*SHARE*](#), Seizing the Hybrid Areas of work by Re-presenting self-Employment (ERC, 2017-2023): **IT**.

[*HECAT*](#), Disruptive Technologies Supporting Labour Market Decision Making (2020-2023): **IR**, DK, FR, SL, SP, CH.

[*NADINE*](#), digital iNtegrAted system for the social support of migraNts and refugEes (2018-2021): **FR**, UK, BE, LU, FR, IT, SP, GR.

[*TECHNEQUALITY*](#), Technological inequality – understanding the relation between recent technological innovations and social inequalities (2019-2021): **NL**, EE, SE, DE, BE, UK, IT.

[*InnoSI*](#), Innovative Social Investment: Strengthening communities in Europe (2015-2017): **UK**, FI, SE, PL, HU, GR, IT, GE, NL, SP.

[*WellSire*](#), Wellbeing Returns on Social Investment Recalibration (ERC, 2020-2025): **IT**.

³ The main partner in bold and participating countries without financing in parenthesis. There is a strong geographical bias in the research projects discussed in this section. The U.K. is mostly involved (in 14% of the projects), followed by Germany and Italy (10% each), the Netherlands (9%), Belgium (7%), and France (6%). The distribution of money between countries might yield a different picture.

[MigrantLife](#), Understanding Life Trajectories of Immigrants and Their Descendants in Europe and Projecting Future Trends (ERC, 2019-2025): **UK**, SE.

[DYMOLAMO](#), Dynamic Modeling of Labor Market Mobility and Human Capital Accumulation (ERC, 2018-2025): **SP**.

[MYMOVE](#), (ERC, 2019-2024): **NL**, BE.

[MiLifeStatus](#), (ECR, 201-2021): **IT**, NL.

[IMMIGINTEGR](#), The Role of the Welfare State in the Integration of Immigrants: Comparative Analysis of Latino Communities in Spain, the United Kingdom and the United States (2018-2022): **UK**.

[SHARE COHESION](#), Cohesion in further developing and innovating SHARE across all 28 member countries (2019-2024): **DE**, DK, NL, FR, IT, SP.

[DEMfam](#), Democratising the Family? Gender Equality, Parental Rights, and Child Welfare in Contemporary Global History (ERC, 2023-2028): **DE**.

[KINMATRIX](#), Uncovering the Kinship Matrix: A New Study of Solidarity and Transmission in European Families (ERC, 2020-2025): **DE**.

[FamilyComplexity](#), Intergenerational Reproduction and Solidarity in an Era of Family Complexity (ERC, 2015-2021): **NL**.

[The WYP Project](#), Working, Yet Poor (2020-2023): **LU**.

[LGBTQ](#), Parenthood and Parental Desires among LGBTQ People: Generational and Cross-national Perspectives (2016-2022): **FR**.

[MobileKids](#), children in multi-local post-separation families (ERC, 2016-2022): **BE**.

[SHAPES](#), Smart and Healthy Ageing through People Engaging in Supportive Systems (2019-2023): **IR**, FI, SE, NO, UK, BE, DE, CZ, IT, SP, PR, GR, CY.

[ICT4life](#), ICT services for Life Improvement For the Elderly (2016-2018): **SP**, NL, FR, HU, GR.

[ENTWINE](#), The European Training Network on Informal Care (2018-2023): **NL**, SE, IT, UK, Israel.

[MenWomanCare](#), Men, Women and Care: The gendering of formal and informal care-giving in interwar Britain (ECR, 2015-2020): **UK**.

[CareWork](#), Female Paid Domestic Care Work: A Node of Social Reproduction (2021-2024): **AU**.

[GenTime](#), Temporal structures of gender inequalities in Asian and Western welfare regimes (ERC, 2018-2027): **UK**.

[ExpPov](#), The Experience of Poverty in the Post-Industrial Economy (ECR, 2022-2027): **IT**.

[YouCDF](#), Young Children of Disadvantaged Families: A Comprehensive Analysis of Parental Human Capital Investment and Child Health (2023-2025): **Türkiye**.

[PCPP](#), Poverty, Child Protection and Parents' Participation (2020-2025): **UK**.

[INVOLVE](#), For trustful, participatory and inclusive public policies (2023-2026): **BE**, FR, DE, IR, PR, PL.

URBANOME, Urban Observatory for Multi-participatory Enhancement of Health and Wellbeing (2021-2025): **GR**, CY, LS, IT, DE, FR, BE.

HEALTHINEQ, Social inequalities in population health: integrating evidence from longitudinal, family-based and genetically informed data (ECR, 2021-2026): **FI**.

The MapIneq Mapping inequalities through the life course (2022-2025): **FI**, EE, SE, DE, SP.

DetEdIn, Micro-, Meso-, and Macro-Level Determinants of Educational Inequalities: An Interdisciplinary Approach (2018-2020): **UK**.

LEARN, Longitudinal Educational Achievements: Reducing iNequalities (2023-2027): **FI**, EE, IT, RO, EE, NL, IE.

PIONEERED, Pioneering policies and practices tackling educational inequalities in Europe (2021-2024): **LU**, FI, LI, HU, DE, NO, IR, CH.

ISTOS, Inclusive Education and Social Support to Tackle Inequalities in Society (2017-2019): **NL**, UK, IR, DE, IT, PT, GR, PL, NO, FR, CZ.

FATHERCHILD, The role of the father in child development and the intergenerational transmission of inequality: Linking sociological stratification questions to developmental psychology research (ERC, 2018-2022): **NL**.

GENEQUALITY, CHILDREN AND GENDER INEQUALITY ERC (2021-2026): **UK**.

CIC, Context, Identity and Choice: Understanding the constraints on women's career decisions (ECR, 2017-2022): **UK**.

Struct. vs. Individ., The 'Declining Significance of Gender' Reexamined: Cross-Country Comparison of Individual and Structural Aspects of Gender Inequality (ERC, 2017-2025): **Israel**.

EMERGINGWELFARE, The New Politics of Welfare: Towards an "Emerging Markets" Welfare State Regime (ERC, 2017-2021): **Türkiye**.

UNI-SEL, Universalism or selectivism? What citizens think about the institutional design of the future welfare state (2021-2024): **NL**.

PRIORITIES, Welfare state politics under pressure: Identifying priorities, trade-offs and reform opportunities among citizens, political and economic elites (ERC, 2017-2023): **CH**.

POPREBEL, Populist rebellion against modernity in 21st-century Eastern Europe: neo-traditionalism and neo-feudalism (2019-2022): **UK**, CZ, PL, HU, Serbia.

DEMOS, Democratic Efficacy and the Varieties of Populism in Europe (2018-2022): **HU**, DE, PL, LI, GR, SK, DK, SP, FR.

Populism And Civic Engagement, Populism And Civic Engagement – a fine-grained, dynamic, context-sensitive and forward-looking response to negative populist tendencies (2019-2022): **UK**, IE, BE, FI, DE, AU, BU.

INWELCHAV, Intersectional Analyses of Welfare Chauvinism in Europe (2017-2019): **BE**.

ASNODEV, Aspirations Social Norms and Development (ERC, 2016-2022): **IT**.

**Ecological transition and changes
in social protection
by Pascale Vielle**

10. Ecological transition and social protection: the scope

10.1. Research questions

The very idea of a '*triple transition*' (ecological, digital and demographic) is more a matter of political than scientific language (see, however, Petmetsidou et al., 2022).

- We can indeed speak of an ecological transition - but also of an ecological crisis, amply documented by the IPCC, which has an existential dimension for humanity and civilisation. We cannot - yet - speak of a digital crisis.
- On the other hand, we can talk about a digital transition, especially in view of the meteoric advances in AI over the last few years, which will inevitably require adjustments to social protection. It should be noted, however, that we currently lack the hindsight to circumscribe these changes and identify their social consequences, and that research into their impact on social protection is still in its infancy (see, however, Section 3.1. the numerous works by ETUI on this issue and Dubois, to be published in 2025 by EUROFOUND).
- In recent years, from the point of view of the link between digital transformations and social protection, the social sciences have taken an interest in the work of platforms (improperly described as the "collaborative economy") and the social issues of discrimination linked to algorithms, or access to social protection in connection with the digitalisation of social protection and social services. These aspects are already the subject of a great deal of substantial research and are therefore not included in this part of the literature review but see Section 3.1. ([ETUI Labour rights and the digital transition conference](#), 2021 and the work of [Périne Brotcorne](#) from 2009). Some pioneering work links the digital and ecological transitions (Pochet, 2017).
- On the other hand, the use of the expression 'demographic transition', at the same level as the other two transitions, seems inappropriate. In demography, the term 'transition' is mainly used to describe a historical and global process, often linked to economic development, characterised by the passage from a society with high birth and death rates to one where these rates are low. In the field of social protection, this subject refers to the balance of funding based in part on the ratio of active to inactive people (see Section 3.2. above). This ratio is the consequence of an ageing population, of course, but also of the dynamics of migration and structural changes in the working population. Moreover, there is every indication that, in the future, the financing of social protection may no longer depend solely on the ratio of working to non-working people due to the

transformation of systems linked to the ecological transition and crisis and the digital transition. Finally, - the "active/inactive ratio" indicator itself remains based on demographic and actuarial data that should be re-evaluated to take account of ongoing transformations (e.g. the impact of extreme climatic phenomena on health, life expectancy, etc., migratory phenomena, the impact of digital transformations on the labour market, etc.).

In agreement with the authors of this document, we therefore in this part of the study focus on the ecological transition. Based on these various considerations, the general question to be answered by future research can be formulated as follows:

"How, in the context of an ecological transition, can research support the transformation of social protection systems to cope with systemic shocks (ecological, technological, demographic, economic) and support the transitions needed to prevent, mitigate and prepare for them?"

Drawing on Hall's typology (1993), this question invites research to explore three types of change with a view to moving social protection systems towards 'ecological social protection':

- 1) the adaptation of instruments ("1st order" changes) which concern a change in the way an existing instrument is used, such as restricting or extending access to a social benefit: methods and forms of risk coverage, adaptation of actuarial bases, participation and control of stakeholders, conditions of access to social protection benefits and other parameters, mainstreaming of the ecological dimension in instruments.
- 2) institutional changes ("2nd order" changes), relating to introduction of new public policy instruments, such as a social-ecological sector in social protection: governance arrangements, scale of intervention, funding, circumscription of categories of contributors and beneficiaries, new social protection programs to cover social-ecological risk, mainstreaming of the ecological dimension in social-ecological protection institutions.
- 3) the paradigm ("3rd order") is the most decisive and conditions the previous two. It relates to the "paradigm" of public policy, i.e. its overall orientation and the ideas on which it is based. In this case, it concerns transformations in the conception of 'risk' and the understanding of vulnerability, in the values underlying the system and the normative framework that incorporates them, and in the general objectives and functions it pursues. Paradigm shifts, from Hall's perspective, necessarily require institutional and instrumental changes.

We propose to focus here on paradigm shifts, and more specifically on the issues at stake:

- related to *the concept of social-ecological risk*: how does it differ from the social risk whose contours were defined by the industrial revolution? Can social-ecological protection respond to this (mitigation, preparation, support)? What new forms of vulnerability are associated with social-ecological risk?
- *theoretical*: what concepts can be mobilised to understand and propose the transformations required, in terms of values and functions, to move towards social-ecological protection?
- and *methodological*: what methods for diagnosing risk and vulnerable groups, devising solutions and communicating results should be adopted by research into social and ecological protection to explore the three types of change that social and ecological protection has to deal with?

Finally, it should be emphasised that social protection, by hypothesis, has very close links with the 3 other themes of the STR partnership and that it is often impossible to dissociate it from the issues of transforming work, "just" transition and education and training.

10.2. Identifying Relevant Studies and Projects

In view of the specific objectives, it seems appropriate to focus on **social-ecological research from the field of social protection** (rather than from the field of ecology – this is why we name it “social-ecological” rather than eco-social), and to concentrate, among these, on research that approaches **social-ecological protection from a theoretical, methodological, international, European or comparative perspective**. We therefore exclude **sectoral** articles (mobility, housing, energy, etc.). Similarly, the question of the **viability of social protection systems** in a context of ecological transition, which calls into question the historical dependence of the welfare state on economic growth, and prompts research to explore alternatives such as green taxation or shorter working hours, is already the subject of a great deal of economic research - and controversy - at both national and international level, and is not addressed here as such.

This document is based on several recent literature reviews:

- [Bohnenberger](#) (2023)
- [Galgoczi and Pochet](#) (2023)
- [Hirvilammi T., Häikiö L., Johansson H., Koch M. and Perkiö, J.](#) (2023)
- [Nenning, L., Bridgen, P., Zimmerman, K., Büchs, M. and Mesiäsllehto, M.](#) (2023)

In addition, a report that we recently coordinated for the SPF Social Security in Belgium (VIELLE et al., 2025, forthcoming) has helped to structure the research issues and prospects presented beyond.

We carried out the following search in the CORDIS database:

```
(contenttype='project' AND applicationDomain/code='funda','society','env' AND (/project/relations/categories/euroSciVoc/code='/29/' OR /project/relations/categories/euroSciVoc/code=='/29' OR /project/relations/categories/euroSciVoc/code='/29' OR /project/relations/categories/euroSciVoc/code=='/29') AND frameworkProgramme='HORIZON','H2020','FP7' AND language='en','fr' AND endDate>=2015-01-01 AND contentUpdateDate>=2015-01-01 AND ('protection sociale' OR 'Welfare state' OR 'sécurité sociale' OR 'social protection' OR 'Etat providence' OR 'social security' OR 'eco-social') AND ('climate change' OR 'ecological transitional' OR 'just transition')).
```

785 projects were identified. Excluding those relating to basic needs (water, energy, etc.) likely to be covered by universal services, there were few relevant projects left, which were moreover only loosely linked to this scoping review. A second search then focused on the keyword "social protection" alone, to examine whether the projects concerned adopted a social-ecological perspective. The following filters were used: contenttype='project' AND applicationDomain/code='funda','society','env' AND ('social protection'), then in the same way, but with the expressions 'social pol*', then 'social security', then 'welfare state', resulting in a pre-selection of around a hundred projects, very few of which addressed social-ecological issues.

To supplement this information, we have consulted the Eurofound, Labordoc (ILO) and Labourline (ETUI) databases. We have limited ourselves to scientific articles and literature reviews published between 2015 and 2025, in English or French, and relating to OECD countries. The keywords and general operators used to launch the search (on keywords and abstracts) are:

```
"social protection OR welfare state OR social security OR social rights  
+ "green*" OR "ecologic*" OR "environment*" OR "climate"
```

Important publications regularly appear in the following scientific journals:

- [Sustainability](#)
- [Ecological economics](#)
- [Transfer](#): European review of labour and research
- [International Environmental Agreements](#)

And to a lesser extent:

- [European Journal of social security](#)
- [International Journal of Comparative Labour Law and Industrial Relations](#)
- [Social policy and society](#)
- [Global social policy](#)
- [Journal of social policy](#)

11. Results

11.1. General considerations: a poorly structured field with unevenly explored themes

From **2010 to 2015**, the International Labour Organisation (ILO) worked to develop the "Guidelines for a just transition towards environmentally sustainable economies and societies for all" (ILO, 2015). Also in **2015**, the Paris Agreement was adopted by the international community, setting the common goal of limiting global warming to 1.5 degrees above pre-industrial levels. The Preamble to the Agreement echoes the work of the ILO and refers to the "imperatives of a just transition for the workforce and the creation of decent, quality jobs". Galgoczi and Pochet (2022) note that Gough had already pointed out in 2008 that the welfare state, which had emerged in the context of an extractive economy model based on fossil fuels and a belief in the virtues of growth, would necessarily be affected by the ecological transition. Yet in 2024, the relationship between social protection and the ecological crisis and transition remained largely unexplored, and thought process tended to continue in silos between 'environmentalists', on the one hand, and social protection specialists, on the other (Galgoczi and Pochet, 2022). In an in-depth and recent review of the literature, Bohnenberger (2025) observes that social security specialists have been insufficiently represented in discussions on social-ecological policy. This has contributed to a distorted view of the role of the welfare state and a limited understanding of the specific issues and areas of social policy. Furthermore, the lack of training of social security experts in ecological research (Galgoczi and Pochet, 2022), combined with the predominance of environmental research at the international level while social security research tends to be concentrated at the national level, complicates the progress of social-ecological research. Moreover, the evolution of modern welfare states, historically linked to economic growth, raises a fundamental contradiction: this same economic growth is now identified as one of the main sources of social-ecological problems (Hirvilammi et al., 2023). This normative shift calls into question the implicit assumptions and conceptual frameworks of welfare state research, thus limiting the development of social-ecological policy approaches (Bohnenberger, 2025; Vielle, 2023).

This observation applies to recent projects relating to social protection under Horizon, Horizon 2020 or FP7: most do not integrate the social-ecological dimension - see [RE-InVEST](#) (H2020 2015-2019), [EUROSHIP](#) (H2020 2020-2023), [WelMovFem](#) (HEU 2024-2027), [PRINT](#) (H2020 2015-2018), [ETHOS](#) (H2020 2017-2019), [Agenda](#) (H2020 2018-2020), [SOLIDUS](#) (H2020 2015-2018).

Few projects stand out from this observation. **Healthineq** (ERC 2021-2026) represents an exception and may provide a useful basis for defining the functions

of social-ecological protection. [ToBe](#) (HEU 2023-2026) goes beyond thinking in silos and integrates social, economic and ecological policies and indicators.

The most frequently cited authors in the field of social and ecological protection come from the field of 'social policies', with a variety of orientations (political economy, political science, law, political and social theory, etc.). Ian Gough (LSE, London) is a pioneer in this field, with a considerable number of publications since 2008 on topics as varied as the foundations of social justice, European policies and social protection instruments. Among economists, the question of the 'post-growth' sustainability of social protection systems is one of the main research themes. Éloi Laurent (Sciences Po, Paris), a long-standing and prolific author on these issues, is also endeavouring to define the contours of social-ecological risk and the redistributive challenges of social-ecological protection (reducing inequalities). Milena Buchs (Leeds), for her part, adopts a more sectoral, applied economics approach, and is also interested in the methodological approaches likely to account for the social and economic effects of ecological policies. Philippe Pochet, who directed the European Trade Union Institute (ETUI) until 2024, is an early author, with a political science approach that has focused mainly on European Union policies. He has helped to establish ETUI as a centre of reference on the issues of social protection and ecological and social transitions. A new generation of researchers is emerging, including F. Laruffa (University of Geneva), a sociologist and theorist; Sebastiano Sabato (OSE, Brussels), a specialist in the social policies of the European Union; Katharina Zimmermann (University of Hamburg), who has led several major projects on European policies; and Martin Fritz (University of Jena), a social psychologist, who is interested in the attitudes, values and representations associated with social and ecological policies. We should also mention a group of social policy researchers from Scandinavian research institutions who regularly co-sign (T. Hirvilammi - Tampere -, H. Johansson and M. Koch - Lund).

Legal experts are also making a significant contribution to the debate on the normative and institutional framework of social and ecological protection. Among those from the field of fundamental social rights, Elise Dermine (Université libre de Bruxelles), holder of an ERC starting grant (RethinkingWork: Rethinking work beyond productivism from labour law and its use 2025-2030), Anja Elleveld (Vrije Universiteit Amsterdam), philosopher and jurist, and Olivier De Schutter (UCLouvain and United Nations Special Rapporteur on Food and Poverty) come to mind.

It should be noted that a significant amount of research is being initiated by or conducted within international or European organisations. The [International Social Security Association](#) has been working on this issue since 2014, and is stepping up its activities in connection with the ecological crisis. The [ILO](#) has made it a major theme since 2015, devoting its [World Report 2024-2026](#) to it. The [Beyond Growth 2023 Conference](#) at the European Parliament was a huge scientific success and devoted several sessions to social protection issues, although it should be noted that the theme remains largely absent from the work

of the [OECD's Green Growth and Sustainable Development Forum](#). [EUROFOUND](#) has integrated the just transition dimension into its activities, but has not yet developed the issues linked to social protection to any great extent. Similarly, it is surprising that the recent report "EU welfare systems and the challenges of poverty and inequality" does not include the ecological dimension (Milotay et al., 2022).

The link between social protection and the ecological crisis is emerging in several research centers in Europe. However, among those that have been focusing on this area for the last ten years or so, the emphasis has tended to be on analysing European policies. These include the Observatoire social européen ([OSE](#), Belgium), the European Trade Union Institute ([ETUI](#), Belgium) and, in Germany, under the direction of K. Zimmermann, a [department at the University of Hamburg](#) which is also home to major research projects on social-ecological risk and the social legitimacy of ecological measures.

Finally, it would seem appropriate to follow the work of ESPAnet ([European Network for Social Policy Analysis](#)), which devoted its first strands to ecological social protection at its annual conference in 2019 (coordinated by Denis Bouget and Philippe Pochet), and has dedicated strands to it every year since, as well as the learned societies in the fields of law, sociology, political science and economics, which are increasingly focusing on the issues of social protection in relation to the just transition. Finally, there is the [Sustainable Welfare and Eco-Social Policy](#) Network, based in Hamburg (K. Zimmermann's centre), which organises annual conferences or sessions devoted to this issue. It merges two previous groups: the Sustainable Welfare Network and the ESPAnet Eco-Social Policy group.

There are not many scientific journals whose editorial line promotes research into social and ecological protection, and they do not necessarily fall within the main field of social protection. At the same time, the journals that can be at the cutting edge in the social protection sector (Journal of European social policy, for example) do not yet have a clear editorial line in this respect, which may reflect the small amount of social-environmental research in the field of comparative and European social policies.

Generally speaking, the impression that emerges from this initial overview is that the community of researchers in social policies seems reluctant to take up the subject, that the researchers who have taken an interest in it have found it difficult to fund research teams, that the direction of research seems to be determined by public orders - which may explain why the most dynamic research centers are strongly focused on a socio-political approach to European programs - and that the dispersion of articles in scientific journals with very varied thematic and disciplinary orientations hinders the visibility of the field. Despite its importance to society, the field is still relatively unstructured, with little or no link to environmental policies.

The literature review conducted by Bohnenberger (2023) led her to identify 20 subjects which she classified according to their "research intensity". Her table is reproduced below.

Table 1: Eco-social research intensity Source: Bohnenberger 2023

Research intensity			
emerging research		established research	
rudimentary	basic	developed	extensive
Financing social security sustainably	Socio-ecological transformation scenarios	Compensating role of welfare states	Social outcomes of climate policies
Climate-resilient social security	Growth-dependency of welfare states	Social outcomes of the climate crisis	Eco-social policies in housing, mobility, nutrition
Eco-social institutions	Environmental impact of welfare benefits	Alliances and eco-social movements	Energy social sciences
Eco-social security during (un)employment, basic income and pensions	Principles of sustainable welfare	Eco-social attitudes and voting behaviour	Environmental impacts of economic distribution
Eco-social security for families, (long-term) care and households	Ecological labour (market) policies	Eco-social country regimes	Normative foundations of sustainable welfare

If we focus on the 3rd-order transformations (Hall's typology supra) that interest us here, they are represented in this table by the following items:

Risk and vulnerability, contributors versus beneficiaries:

- social outcomes of climate policies (++++)
- environmental impacts of economic distribution (++++),
- Social outcomes of the climate crisis (+++)

Normative foundations:

- normative foundations of sustainable welfare (++++)

Function:

- socio-ecological transformation scenarios (++)
- compensating role (+++),
- principles of sustainable welfare (++)

Methods:

- eco-social country regimes (+++)

It should be noted, however, as we shall see later in this document, that the amount of research carried out on certain subjects is not necessarily indicative of the degree of intellectual and scientific innovation expected (for a 3d order change) in the way they are dealt with.

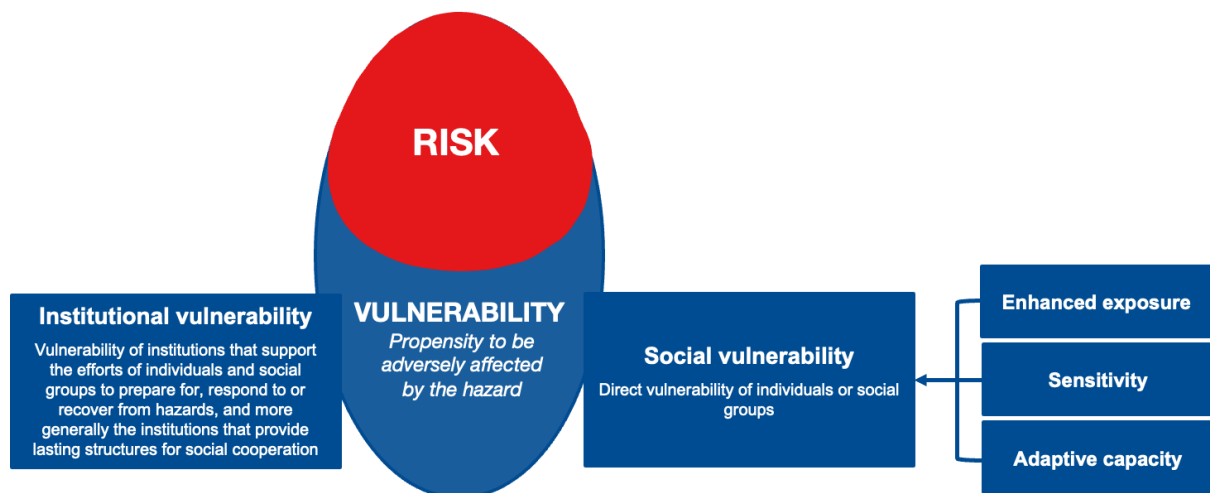
11.2. The difficulty of thinking about social-ecological risk

In the design of a social protection system, “risk” is a fundamental category. The conceptualisation and representation of “risks” or “contingencies” will determine the respective roles of the State, the market and the family in their coverage. It also makes it possible to identify the beneficiaries and contributors groups, and therefore the forms of solidarity to be implemented. Risk is a social convention (Ewald, 1986) and is therefore also linked to the culture - in the broadest sense, with its technological, economic and ecological dimensions - in which it is designated. Social risk, which forms the basis of social protection in developed countries, is a category that is consubstantial with the industrial revolution: in a production model structured by binary class relations, in which the majority of the population works in a wage-earning relationship, it is constructed as a series of situations in which the worker cannot earn remuneration, or is faced with additional burdens (health care, children). The societal consensus on the mutualisation of these risks is based on the usefulness of this cover to support the industrial production model politically, socially and economically, and this production model in turn feeds social risk cover.

The very idea of 'ecological transition' refers to a transformation of the production model, on the one hand, and to an ongoing ecological crisis, on the other, which call for a rethinking of social protection, rather than an adaptation at the margins. Research into social risk and environmental risk must therefore be brought together to conceptualise the 'social-ecological risk' on which the social protection of the transition must be built - without, however, requiring the disappearance of 'traditional' risks and their coverage. This integration is still in its infancy, as Hirvilammi et. al. (2023) and Bohnenberger (2025) show in their literature review. The [Oasis](#) project (H2020 2017-2020), which provides a useful [database](#) for climate risks, does not, for example, integrate the social dimension of risk.

However, since 2023, conceptual progress has been made. For example, as part of a pilot project involving researchers from the environmental and social fields, Bauler, Fransolet and Laurent (Vielle et al., 2025) were able to identify founding categories of social-ecological risk, which will provide a clearer focus for future research. Based on the principle that risk is a combination of alea (hazard), exposure and vulnerabilities (social, institutional), they distinguish between the risks of socio-technical transition (linked to ecological transition policies), on the one hand, and the risks of biophysical transformations (linked directly to the ecological crisis), on the other. This innovative representation of 'social-ecological' risk paves the way to a new research agenda.

Figure 1: The social-ecological risk - Source: Bauler, Eloi and Fransolet in Vielle et al., 2025



According to Bohnenberger's literature review, socio-technical transition risks (which she refers to as "social consequences of environmental policies") represent one of the most studied fields to date (see for example Buchs et al., 2011, or Gough, 2017). However, in addition to their effects on health, the co-benefits of climate protection measures are rarely considered, which leads to an overestimation of the costs and an underestimation of the benefits of environmental policies, thus leading to sub-optimal proposals in this area (Karlsson et al., 2020). Bohnenberger believes that a more comprehensive approach to the social impacts of environmental policies - including participation, temporal well-being, security and quality of life - would enable social security researchers to design more effective climate protection measures.

On the other hand, the risks of biophysical transformation, which she refers to as the 'social impact of climatic events', have mainly been analysed in the field of development studies, as if the countries of the global North were not concerned (Bohnenberger 2025). However, there is the European [TRANSrisk](#) project (H2020 2015-2018), which examines, among other things, the social impact of biophysical risks. But there remains a crying need for qualitative, inductive and participatory studies to better identify vulnerabilities to extreme events in the countries of the European Union: floods, droughts, heatwaves, pandemics, etc.

According to Renn, a member of the Foundation Board of the International Risk Governance Council (IRGC), today's environmental and climate risks are "systemic risks", as they impact the systems that are essential to the functioning of human societies. These risks are characterised by being (1) global, (2) highly interconnected and nested leading to complex causal structures, (3) non-linear in their cause-effect relationships, and (4) stochastic in their effect structure (Renn 2016, p. 29-30). Moreover, systemic dynamics also present irreducible uncertainties as well as a diversity of legitimate values and perspectives (ambiguities) (Aven and Renn, 2020; Callon et al., 2001; Funtowicz and Ravetz,

1994). Bauler, Fransolet and Laurent (Vielle et al., 2025) therefore observe that the introduction of future social-ecological protection will oblige political and public institutions to adapt their decision-making processes to the complexity of social-ecological risk, which cannot be addressed by the 'risk engineering model' - an expert approach based on probabilistic analyses traditionally used to manage 'simple', individualisable risks such as car accidents or smoking-related illnesses (Aven and Renn, 2020; Brunet and Guyot, 2019; Renn, 2016). The inadequacy of the classic risk management model has led to the development of alternative models, specifically adapted to systemic and dynamic risks marked by profound uncertainties and ambiguities, as is the case for social-ecological risks. This development is based on work in risk governance (see e.g. Hood et al., 2001 and Renn, 2008), which has given rise to guidelines for public and private players involved in risk governance, such as those proposed by the IRGC (see e.g. IRGC, 2015; 2017 and 2018). Social-ecological risks therefore require an overhaul of traditional collective risk management systems, affecting all the parameters of social protection: funding methods, scope of beneficiaries and contributors, stakeholder participation, role of public authorities, governance, risk coverage instruments.

This conception of risk also invites researchers to reconsider which groups are considered 'vulnerable'. Hirvilammi et al. (2023) review the way in which traditional approaches to social policy focus mainly on redistribution and social protection, without considering the dynamics specific to ecological crises. By limiting themselves to a purely social analysis, they conclude that research neglects the cumulative and systemic impact of ecological crises on populations.

However, unlike social vulnerability in the context of traditional social protection, social-environmental vulnerability is characterised paradoxically both by its dispersion (due to its combination with exposure to the risk of socio-technical transition or environmental transformation, etc.) and by the recompositing of vulnerable groups around new fault lines (territory, age, gender, housing insecurity, energy or water insecurity, mobility poverty, food insecurity, environmental inequalities, etc.), and by the recompositing of vulnerable groups around new fault lines (territory, age, gender, housing insecurity, energy or water insecurity, mobility poverty, food insecurity, environmental inequalities, health inequalities, the digital divide, loneliness, etc.) which call for intersectional approaches. For example, the population of undocumented migrants or those who have been forced to migrate is a particularly vulnerable group that needs to be considered when designing social and ecological protection. The results of projects such as [QuantMig](#) (H2020 2020-2023), [HumMingBird](#) (H2020 2019-2024) [EASYRIGHTS](#) (H2020 2020-2022) or [SIRIUS](#) (H2020 2018-2021) can contribute to this. The same applies to farmers, whose economic and social support is the subject of a number of European projects such as [EFFECT - H2020](#) (2019-2023) and [Contracts2.0 \(H2020\)](#) (2019-2023). We can also cite the "yellow waistcoats" phenomenon, which demonstrates the importance of constructing a concept of "social-ecological risk" distinct from social or environmental risks.

In addition, there is a growing gap between the socio-economic consequences anticipated by climate models and the socio-economic assumptions on which social policy analyses are based. Thus the indirect social consequences of the climate crisis - such as food price inflation, crisis-induced violence or reduced accessibility of public spaces - and their regressive effects on vulnerable groups are rarely taken into account in studies on inequalities (Bohnenberger, 2023; Johansson et al., 2016).

This dual trend (dispersal of risk and the formation of new vulnerable groups) is also leading to rethink the challenges of solidarity:

- who should finance, and who can benefit from, the system of protection against social-environmental risks (social-environmental justice issues)? [IMAJINE](#) (H2020 2017-2022), [COHSMO](#) (H2020 2017-2021)) and [TransSOL](#) (H2020 2015-2018) are interesting European projects in this respect. The environmental impact of economic distribution, for its part, has been the subject of extensive research, although it still neglects the intersectional approach (Bohnenberger 2023). Research suggests that climate objectives cannot be achieved without a reduction in economic inequality (Rao and Min, 2018) and highlights the need to reduce the climate impact of economic wealth by reducing the over-consumption of the richest categories (Barros and Wilk, 2021, Gough, 2022)" (Bohnenberger).
- In what forum should this be decided, and how - and with which players - should new alliances be established around common objectives (political issues)? Galgoczi and Pochet (2023) note that while the key question is: how can this social-ecological protection be implemented democratically and in good time, these aspects remain under-studied. The same applies to the methods of stakeholder participation that need to be put in place, even though there is a broad consensus in the scientific community that social and ecological protection must be based on participatory mechanisms that respond as closely as possible to concerns on the ground (Hirvilammi et al., 2023, Vielle et al., 2025).

11.3. The need for a normative overhaul of social and ecological protection

Bohnenberger (2023) considers that the normative foundations of sustainable well-being have been widely explored (++++). Nenning et al (2023) identify five approaches to social protection systems in the face of the climate crisis: **adaptive social protection, just transition, the Green New Deal, post-growth and ecofeminism**. These approaches vary according to their positioning between green growth and anti-capitalist critique, their conception of the climate crisis and their recommendations in terms of social protection. While adaptive models focus

on cash transfers and insurance, just transition and the Green New Deal emphasise redistribution and labour market policies. Post-growth and ecofeminist approaches, on the other hand, advocate universalist and decommodified policies. Galgoczi and Pochet (2023) observe, however, that the notion of 'just transition' remains vague and not very heuristic for anchoring research on social protection (the same can be said of the slogan 'leave no-one behind' that is often associated with it).

Table 2: Comparison of different policy approaches to the climate crisis and social protection Source: Nanning et al. 2023

Approach to capitalist economic growth	Literature strand	Climate crisis caused by:	Conceptualisation of challenges to social protection systems from climate crisis:	New norms and policies for social protection in face of climate crisis:	Dominant theory of transformation:	Primary geographical focus:
Pro green growth	Adaptive Social Protection	Unsustainable economic growth and economic underdevelopment	Social protection policies insufficiently adapted to new environmental risks; climate change also makes existing policies less effective	Provide buffer through targeted cash transfers, insurance for most vulnerable households against environmental risks, support for sustainable agricultural transformation, job guarantees, enhance adaptive capacities of households in long-term to support green growth	Elite-driven international development agenda	Global South
Green growth ambivalent	Just Transition	Unsustainable economic growth	Social protection insufficiently redistributive and democratic to support workers in processes of sectoral decarbonisation	Distributive justice: income protection through unemployment and pension insurance, re-training functions of unemployment benefit systems, green job programs; Procedural justice: democratic governance of social protection involving social partners	Mix of bottom-up processes led by trade unions and elite-driven statist policy agenda	Global North
	Green New Deal	Unsustainable economic growth	Social protection insufficiently adapted to new risks and insufficiently oriented towards decarbonisation	Unemployment benefits, re-training function of unemployment benefit systems, green job programs	Mix of elite-driven statist policy agenda and bottom-up processes	Global North
Anti-capitalist, post-growth	Post-growth/sustainable welfare	Capitalist economic growth	Growth-based social protection systems as key element of climate crisis and barrier to post-growth transformation	Universalist, decommodifying policies e.g. Universal Basic Income, Universal Basic Services, caps on maximum income and wealth, reduction of working hours, reduction of labour taxes and increases of environmental taxes	Mix of elite-driven policy agenda and bottom-up processes through social movements	Global North
	Eco-feminism	Capitalist, sexist and colonial economic system	Commodifying and stratifying social protection systems as key element of global capitalism, reproducing climate crisis and social injustice	More universal and decommodifying social protection systems, public and democratic services, reorganisation and redistribution of social reproductive labour,	Democratic bottom-up processes through social movements	Internationalist focus

If the field of social policies is to be projected into the paradigm shift represented by the ecological transition, it needs to be anchored in new heuristic normative referents. Yet, once again, the referents and institutional frameworks of environmental and climate justice, on the one hand, and social justice, on the other, are in little dialogue when it comes to defining the contours of a new regime of equitable and sustainable production (Galgoszi and Pochet, 2023; Bohnenberger, 2023), while intergenerational and international justice, and the participatory dimension that underpins environmental justice, must become a priority for social justice thinking (Fitzpatrick, 2001), avoiding anthropocentric approaches that exclude the rights of nature.

In this respect, although Polanyi remains an essential source of inspiration for thinking about these issues, the broad theoretical and normative frameworks that fundamentally overcome the *summa divisio* between social and environmental approaches today stem from feminist and postcolonial thought (Delruelle, 2019, Bohnberger, 2021). We might mention the work of N. Fraser (who articulates social, environmental and democratic issues in her depiction of a "cannibal capitalism"), J. Tronto (who since 2012 has been developing a political approach

to "care" encompassing care for humans, nature and democratic care). In *The Code of Capital* (2019), Pistor also offers a hard-hitting analysis of capitalism and suggests ways of regaining democratic control of essential resources. It is important that research into social-environmental protection should finally take hold of these reading grids to move beyond the binary perspective derived from Marxian analyses.

Furthermore, institutional frameworks such as the major international instruments play an essential role in consolidating a transnational epistemic community, both scientific and political. This was the case in the construction of social protection, around key concepts such as social security (ILO Convention 102), then social protection (ILO Recommendation 92/442/EEC, ILO Recommendation 202), or just transition. As far as environmental rights are concerned, Armeni points out that while participatory rights appear to be firmly established (Armeni, 2021), this is less the case for the right to a healthy environment, for example. The integration of civil and political rights, on the one hand, and environmental rights, on the other, is progressing mainly through case law (in Vielle et al., 2025). And this integration extends only very indirectly to social rights. The conceptual and institutional development of international regulatory frameworks integrating social and environmental rights with a view to a 'just transition' therefore appears to be a necessity (Vielle et al., 2025). One example is the European Pillar of Social Rights.

Institutional perspectives on social protection favour a rights-based approach, which has been progressively strengthened and broadened with the aim of ensuring human well-being on a collective and mutually supportive basis (see Section 3.3. above). There are two other approaches to understanding the need for the welfare state to equip its beneficiaries to cope with social and ecological risks: capabilities (Nussbaum, 2000) and basic human needs (Max-Neef, 2010). Both have been reinterpreted by many authors in the context of the ecological transition (Bonvin and Laruffa, 2022; Laruffa, 2022). Finally, we should not overlook the 'doughnut' approach proposed by Kate Raworth (2017), which is frequently used in attempts to link social and environmental issues in public policy. See Fransolet et al. (2023) for an attempt to link these different concepts with the framework of fundamental rights.

In the context of the ecological transition, these approaches have led part of the scientific community to develop the concept of ecological or environmental citizenship, integrating environmental rights (Hirvilammi et al., 2023, Brohnenberger, 2023). Hirvilammi et al. (2023) note that Dean (2000) extends the Marshallian model by adding, for example, the right to a healthy environment. Conversely, Dobson's (2003) ecological citizenship emphasises individual moral duties by associating personal responsibility with one's ecological footprint, thus transforming each citizen into a moral actor towards nature and other species. Hirvilammi et al. (2023) consider that both approaches make it possible to link environmental concerns with theories of social citizenship, by introducing new norms relating to rights and duties not only towards living humans, but also

towards the environment, future generations and other species. This perspective also transcends traditional frameworks by addressing issues of intergenerational and international justice and raises the question of the inclusion of non-citizens, particularly in the context of climate refugees.

Finally, in the context of the climate emergency, Hirvilammi (2023) observes that the debate is moving towards a rebalancing of the rights and duties of citizens in relation to States and other species, paving the way for an integrated 'eco-social' policy. Laruffa et al (2021) contribute to this by proposing a broader conception of participation, valuing not only access to the labour market but also reproductive and ecological work, and making 'taking charge of the world' a fundamental duty of the welfare state. In the same vein, many legal scholars are currently working on the notion of the 'commons' (Rochfeld et al., 2021; Gutwirth and Stengers, 2016), which should be understood both as a social protection issue requiring time to be freed up for citizen participation (Vielle et al., 2025), and as social protection itself that can be analysed as a 'commons' and requiring renewed citizen participation (Vielle, 2023).

11.4. Designing the redeployment of social protection functions

The above considerations call for research into renewing the functions and governance of social protection to move towards ecological social protection. Bohnenberger considers that these issues are under-explored (++) . Thus, while social-ecological links have been explored in depth for certain sectors, the structural transformations that social protection could bring about have received little attention. This trend is also reflected in the CORDIS database, although some projects are exceptions. [ToBe](#) (HEurope 2023-2026) goes beyond thinking in silos and integrates social, economic and ecological policies and indicators. [COP21 RIPPLES](#) - COP21: Results and Implications for Pathways and Policies for Low Emissions European Societies (H2020) is another example of trans-disciplinary integration, which helps to better situate the role that social protection can play, even if it does not address it directly.

The conventional view is that, in the face of social risk, social protection must fulfil compensatory functions: income maintenance and compensation for exceptional costs (e.g. healthcare), on the one hand, and support for participation in the labour market, on the other. It must also **accompany the process of ecological transition** - just as it accompanied the previous production regime.

The challenges of **compensation** are changing, both in terms of the risks of biophysical transformation (loss of a crop for farmers, absence from work due to extreme temperatures, loss of a home, whereas private insurance does not cover climate risks) and socio-technical transition (restructuring of companies, for example), although research has not systematically addressed the issues involved in extending this function of social protection to social-ecological risks

(see, however, Vielle et al., 2025). Nor has it looked at revising the actuarial and budgetary bases of compensation for 'classic' risks (accidents at work, pensions, unemployment) in the light of social-ecological risk (see, however, Flouris et al., 2024).

The emergence of discussions on basic needs suggests that social protection should play a role in guaranteeing them. Sufficiency" policies now appear to be an important lever for achieving climate objectives (Creutzig et al., 2022), making it possible to ensure human well-being (Creutzig et al., 2021) through more equitable distribution (Akenji et al., 2021). Galgoczi and Pochet (2023) also note a rise in academic debate around the concept of **sustainable well-being**, which seeks to reconcile social justice and environmental imperatives (Galgoczi and Pochet, 2023), but according to Bohnenberger (2023), thinking on **sustainable well-being** remains limited by a conceptualisation that is still largely rooted in economic criteria, ignoring ecological limits. Many European projects address these issues, often in the field of development studies (e.g. [AfriAlliance](#) - H2020 2016-2021, [Dafne](#) - H2020 2016-2020), but neglect to consider the role of social protection. The way in which social protection could contribute to sustainable well-being, by guaranteeing basic human needs such as water, energy and mobility within ecological limits, remains to be investigated.

With regard to participation, some researchers consider that the reduction in the demand for well-being - necessary to mitigate the ecological crisis - could be achieved through sustainable 'post-growth' economic policies (Buch-Hansen, Koch and Nesterova) ensuring a better distribution of work (Buchs, 2021), resources, opportunities and greater economic security, as well as an improvement in community and family capacity to provide social support, care and participation (Chertkovskaya et al., 2019). The recently completed [CAPABLE](#) project (ERC 2018-2024) is part of this approach. We could therefore expect social protection to encourage, in both the market and non-market sectors, meaningful activities in the context of the ecological transition: caring for people - in particular by strengthening human health prevention policies (Buchs, 2021) - and for nature, participation in cooperative projects, citizens' initiatives, etc. These are all activities that are not currently part of the mainstream of social protection. These are all activities that are not, or only marginally, profitable, but which are necessary in a phase of transition. Hirvilammi et al (2023) note that, particularly with a view to post-growth economic policies, some researchers (e.g. Goodin and Rein, 2002; van der Veen and Groot, 2006) are calling for activation requirements to be relaxed, while others are arguing in favour of the massive creation of green jobs in the public sector, or even a state job guarantee (Dietz and O'Neill, 2013). Legal experts have also looked at the way in which social protection could meet the new needs for time off work associated with the transition and the ecological crisis, particularly in terms of access to essential needs, from the extension of tried and tested formulas - such as family leave - to activities that are conducive to the transition, to the granting of a minimum income (Dermine and Dumont, 2022; Dermine, 2023; Dermine and Dumont, 2025). The

RethinkingWork (ERC 2025-2030) project should provide interesting insights from this point of view.

More generally, we might consider that research tends to focus on the compensatory role of social security, but neglects its role in accompanying transition and above all its transformative role in overcoming the ecological crisis - and Bohnenberger (2023) draws attention to danger this entails of introducing phase-out exemptions for disadvantaged groups, for example, and exacerbating disparities in access to clean technologies postponing both social and climate objectives (the yellow waistcoats phenomenon). From this point of view, the COVID19 crisis was a real laboratory from which research is far from having learned all the lessons for social protection.

From a transformative perspective, the work of Duit et al. (2016) proposes the notion of the 'environmental state', i.e. a 'set of institutions and practices dedicated to the management of the environment and societal-environmental interactions', including environmental ministries and agencies, environmental legislation and associated bodies, dedicated budgets and environmental finance and tax provisions and scientific advisory councils and research organisations. However, this "top down" approach seems to run counter to the participatory requirements set out in the section on foundations, which call for the implementation of "bottom up" and pragmatic decision-making mechanisms. Duit's environmental state is opposed to the enabling state model (Wallace et al. 2013 and Wallace, Brotchie and Ormston, 2019). This new state paradigm, which is more committed and responsive, calls for an even more far-reaching transformation of the missions of the social state, which responds to the conceptual frameworks developed above. For Wallace, the Enabling State is *"one that seeks to address stubborn inequalities of outcome and gives people and communities more control over the public services they receive to improve their own wellbeing"* (Wallace, 2019). In a review carried out for the Carnegie Foundation in 2019, six years after this first text, Wallace identifies seven changes underway which characterise the Enabling State and around which Belgian social security must evolve in order to respond to socio-environmental risk (Wallace, Brotchie and Ormston, 2019)

Figure1 The shift from Welfare State to Enabling State - the seven interconnected policy shifts - Wallace et al. 2019



This model calls for an in-depth rethink of the functions of social protection, its governance (decentralisation, cooperation, pragmatism, prevention, participation methods) and the players involved, beyond the traditional social security players. We note that certain European sectoral projects are adopting an approach that corresponds to this model. For example: [PROSEU \(H2020 2018-2021\)](#) PROSumers for the Energy Union: mainstreaming active participation of citizens in the energy transition.

11.5. A renewal of research methods aligning with the enabling state

The literature reviews we have consulted all agree that traditional methods of analysis are limited in their ability to grasp the complexity of the interactions between the social crisis and the ecological crisis. While research into social protection and the welfare state has largely relied on deductive and increasingly quantitative methods, the transformation of social protection into social-ecological protection, in a context of third-order change, requires a profound renewal of methods for understanding reality and institutions. First and foremost, a new alliance between citizens, researchers and public authorities, in line with the enabling state model, which could be described as a "green triangle", is needed: as far as possible, research should make use of participatory methods involving these three players. Qualitative methods and inductive approaches also need to be revitalised, so that we can identify how best to support European citizens in the face of social-environmental risk, understand the obstacles they face in their access to sustainable well-being and support them in meeting their basic needs, and enable social protection to fulfil its role as a lever for socio-technical transition. Theoretical research into the foundations and functions of ecological social protection must also be promoted. Here we take a brief look at some interesting research methods.

As can be seen from the above, future research in this field must above all involve researchers interested in environmental and social policies, to develop new cross-thematic social-ecological concepts that can be used to design tomorrow's social-ecological protection (see Vielle et al. 2025). Similarly, transdisciplinarity (involving economists, lawyers, political scientists, sociologists and geographers) should be encouraged (Hirllammi et al., 2023).

In view of the above, the identification of vulnerable groups cannot be based on a single dimension and be limited to the use of predetermined categories such as demographic groups (e.g. the elderly, children) or socio-economic groups (e.g. low-income households, migrants, workers in sectors undergoing restructuring). This requires intersectional approaches involving a nuanced, contextualised and

dynamic analysis of the multiple factors likely to combine and lead to increased vulnerability to social-ecological risks (Kuran et al., 2020).

Participatory processes involving all vulnerable groups on an ongoing and effective basis are essential if we are to understand the diversity of situations. In addition, some of the multiple vulnerabilities associated with social and environmental risks are new and are currently given little or no consideration in social and environmental policies. Taking account of the concerns and specific needs of some of these new vulnerable groups, including people living in developing countries, future generations and non-human living beings (animals, plants, ecosystems, etc.), also means giving a voice to groups that are usually silent and invisible in decision-making processes, which means rethinking democratic systems.

Mapping is a useful tool for supporting this type of approach, as it makes it possible to cross-reference multiple data on factors of vulnerability to social-ecological risks with data on the level of exposure to these risks. In particular, this tool has been used by a number of municipalities in the Brussels-Capital Region to identify people who are vulnerable to climate risks as part of the process of drawing up their climate change adaptation plans (see, for example: De Muynck et al., 2022 and 2023; De Muynck and Ragot, 2022). These maps, which superimpose layers of exposure to different climatic and environmental risks (e.g. heat islands, flooding, air pollution) with geographical data on factors of vulnerability to these risks (e.g. quality and occupancy rate of housing, age of the population, sealing of soil, access to green spaces) would benefit from also incorporating vulnerability to the risks of socio-technical transition and from being produced at other geographical scales .

The development of maps of vulnerability to social and environmental risks could go hand in hand with the construction of indices of vulnerability to these risks. An effort to construct such an index has been undertaken in France by the Conseil National des Politiques de Lutte contre la Pauvreté et l'Exclusion Sociale (CNLE), which in a recent report (CNLE, 2024) proposed an "Indice de cumul des Contraintes sur la Décarbonation". This index, which incorporates 11 indicators corresponding to constraints preventing the adoption of lower-emission practices (e.g. poverty, long commuting distances, inaccessibility of public transport networks, tenancy status), makes it possible to identify groups vulnerable to decarbonisation policies and the various factors that combine to produce these vulnerabilities. The [AlphaGeo](#) project does the same for the United States, by cross-referencing data linked to the risks of biophysical transformation with an index of "social resilience", constructed from 6 indicators (AlphaGeo, November 2024). It would be relevant to develop a similar index for Belgium, considering the other risks of socio-technical transition and those of biophysical transformation.

Research into ecological social protection must also favour pragmatic approaches, including the actors and beneficiaries of ecological social protection. While this method is familiar to disciplines such as anthropology and sociology, it

is less so to political scientists. Economists (following the example of Esther Duflo) and lawyers (in the wake of Sabel's work (Sabel, 2012, Sabel and Zeitlin, 2012)), for their part, have innovated a great deal in this field in recent years, adopting pragmatic approaches (Dermine, 2017). Methods such as democratic experimentalism should be favoured (Lamine, 2018) to ensure that the proposals formulated are congruent with the context of their implementation. [Justnorth](#) (H2020 2020-2023) represents a model of a pragmatic approach to identifying new vulnerabilities but concerns the Arctic. On the other hand, [DEEDS](#) (ERC 2017-2020) represents a model of participatory research that could serve as a model for future research.

Future scenarios can be used by researchers to explore the possible futures of social protection and the ecological transition (Amy, Fransolet et al., 2024). Systems approaches should provide a better understanding of the complex interactions between social, economic and environmental systems (see, for example, Petit, Frauger and Bauler, 2022).

Comparative research, which can be described as neo-institutional, founded the field of comparative social policies in the wake of the work of Esping-Andersen (1989). Based on these references, the NOE [RECWOWE](#) (FP6 2006-2011) has led to the spread of a network of researchers, a number of whom are to be found among those interested in ecological social protection. The neo-institutional approach explores, from a comparative and historical perspective, the respective roles of the actors, values and institutions that have shaped different models of the welfare state, and the determinants of the evolution of social protection systems. It should be noted, however, that the entire comparative model is conceived within a paradigm of industrial capitalism, which calls into question its relevance to the comparison of social-ecological welfare states. For Galgoczi and Pochet (2023), who have reviewed the studies aimed at mapping the convergences between welfare regimes and climate ambitions, the results remain "fragmented and inconclusive". Hirvilammi (2023) comes to the same conclusion. However, this field of study is extremely vast, and the two literature reviews to which we refer identify some interesting work on the factors driving the evolution of social-environmental policies. Comparative research must be continued, in particular to refine understanding of the functions of social protection in relation to social-environmental risk, and to support the Union's policy convergence initiatives targeting both social protection and the greening of its economy, but it must gradually lead to a recalibration of the parameters of comparison to bring them into line with the paradigm shift represented by the social-environmental state

12. Discussion

The climate emergency calls for a rethink of traditional social policies by integrating environmental dimensions, to prevent and reduce the social problems

caused by ecological crises. A social-ecological approach offers a promising framework for rethinking public policy by promoting synergy between social justice and ecological sustainability. However, while we are witnessing the emergence of integrative research proposing new analytical tools to study the issues and contours of social-ecological protection, this literature review indicates that much remains to be done. The watchword for future research is certainly integration.

Bohnenberger (2023) observes a geographical variation in the intensity of the research themes observed. In English-speaking countries, concrete fields of application, such as fuel poverty, are particularly developed. In the Scandinavian region, conceptual issues relating to the institutionalisation of eco-social policy are widely addressed, while in the southern European region, transformative approaches are more present. There is little research from the Eastern European perspective, and the continental regions focus on the meso level of eco-social transitions, such as sustainable work or policy alliances. She considers the following factors to be decisive in explaining research intensity:

- **Political crises and socio-ecological emergencies:** Public debates and political events (such as the Sustainable Development Goals, the Green Pact for Europe, or the energy crisis) stimulate innovation in eco-social research.
- **Predominance of technical and economic approaches:** Historically, ecological problems have been viewed mainly from a technological and economic angle, which has led to a neglect of social approaches. However, given the failure of green growth strategies, interest in socio-structural conditions is growing.
- **Disciplinary influence:** The economic perspective dominates climate research, which limits consideration of the social dimensions and leads to biased policy recommendations, omitting essential aspects such as social security.
- **Justifying climate policies:** To promote acceptance of climate protection measures, eco-social policies tend to focus on compensatory measures that preserve the status quo, overlooking the potential synergies between social and environmental issues.
- **Insufficient interdisciplinary funding:** Research funding is often compartmentalised by discipline, penalising cross-sectoral approaches and limiting opportunities for projects integrating both social and environmental dimensions.
- **Normative limits in social security:** The lack of involvement and training of social security experts in debates on sustainability leads to a reductive vision of the welfare state, hindering the full integration of social issues in the fight against socio-ecological problems.

This overview shows that, although social-ecological approaches are beginning to gain ground, they are still facing historical, disciplinary and institutional obstacles to their development and integration into global climate policy. Given these explanations, the priority is undoubtedly to support the structuring and visibility of a field of study devoted to social-ecological protection. The Horizon programme can help to develop this field of study by stimulating - as was done

successfully with RECWOWE (FP6) - the creation of cross-thematic (environment vs. social protection) and interdisciplinary networks, bringing together stakeholders in social protection and with a research agenda based on innovative methods, with constraints on scientific dissemination and popularisation.

Research should focus on adopting, adapting or developing robust transdisciplinary and transthematic tools that define the theoretical and conceptual foundations of social-ecological protection: norms (in terms of social justice and social rights within planetary limits), risks, vulnerable groups, functions, governance principles and the range of risk coverage instruments. They will also have to experiment with innovative methods (pragmatic, intersectional, participatory, etc.) likely to provide the closest possible approach to the reality of social-ecological risk and its political responses.

From the point of view of social-environmental citizenship, the development of an integrated institutional framework of social-environmental rights must mobilise environmental lawyers and social rights lawyers together. The FRA report (2025) on the European Green Deal represents an interesting first attempt. In line with this framework, theoretical and economic policy research on sustainable well-being needs to be further developed.

Basically, research will not be able to avoid the deployment of social and ecological protection in a post-growth context (Galgoczi and Pochet, 2023, Bohnberger, 2023 and Hirvalimmi 2023). This line of research has also proved particularly fruitful in addressing the transformative function of social-ecological protection.

The parameters of social-ecological risk (Vielle et al, 2025) must be put to the test, in particular for the risks of biophysical transformation whose consequences will ultimately be the most serious. A better understanding of the social-ecological risk should enable a detailed identification of the new vulnerabilities for each of the various essential needs (access to water, housing, energy, etc.) to be explored. This work should make it easier to identify new types of distribution conflict and possible alliances and help to resolve new forms of injustice between segments of the population, between generations, between countries and with regard to nature (Hirvalimmi 2023). To guarantee each essential need, they should also make it possible to define global, multi-level strategies in line with the enabling state model, combining prevention, empowerment of citizens and sectoral policies according to the need concerned.

At the end of her remarkable review of the literature, Bohnenberger identifies 5 research objectives for the coming years. We borrow them from him to conclude this document:

"(1) Can an expansion of the welfare state reduce the environmental burden through a change in demand structures? (2) Can welfare states be stabilised independently of environmentally-damaging economic growth? (3) How can a change in financing social security support a socio-ecological transformation? (4) What (new) programs and institutions are required to insure against eco-social risks? (5) What changes imply ecological mainstreaming in the fields of social security?"

13. Bibliography on Ecological Transitions

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14. Conclusions and preliminary recommendations for further research

Social policy, in its diversity, has produced a multitude of approaches for studying and comparing welfare systems implemented in different countries and groups of countries. In welfare state research, it is customary to speak of different orientations of research, each of which identifies the scopes and tasks of research differently. There are also temporal shifts in these orientations. The reasons for shifts in orientations are manifold: time, access to comparable data, better statistics, challenges societies face, and research agendas set by various international actors and financiers. In recent decades, the latter two factors have greatly shaped the orientation of research around the welfare state and its various policy domains.

During the years, not only the scopes of research have changed but also the aims of what the research tries to achieve have changed. With some exaggeration we can speak about three main approaches within the welfare state studies: descriptive, analytical and problem-solving approaches (see for example, Bhattacharjee, 2012; FORTE, 2024). The first approach, the descriptive approach, tries to answer the "what" or "*the is*" question; that is, to define the phenomenon, provide descriptions of the central characteristics, content, magnitude, and developmental patterns over time. The second approach seeks to dig deeper, analyse relationships, find correlations, and identify possible mechanisms that explain the appearance of the phenomenon. This type of research revolves around the "how" and "why" questions. The third type of research is inspired by the "what should be done" ("*the ought*") question and aims to offer solutions to defined social problems. These approaches are not mutually exclusive and often they are often sequential.

The Swedish economist Gunnar Myrdal (1970) stated that social scientists should overcome their shyness to give political advices and draw practical and political conclusions. According to Myrdal, this approach would contribute to better and more rational policy-making. It does not mean that the scientist would go and take an opinion on *the ought* aspect. Neither needs the policy recommendation to be of the type: "do A or do B" but instead, "if you want to achieve X, you should take A rather than B, but if you want to achieve Z, you should take B rather than A." This kind of recommendation would spare the scientist from making value-laden and oftentimes politically contested ought decisions about goals in policy-making.

The topics explored by the projects reviewed are relevant and address important aspects of societal changes and their consequences. However, there are several themes into which future research should delve more deeply. Most social policy decisions are predicated on the assumption of ecological stability, continued growth and stable economic and political circumstances, all of which are currently going through a period of turbulence. Consequently, scenarios involving known and foreseen events (such as the ecological crisis) or possible 'black swans' -

unanticipated negative shocks (such as new pandemics, the collapse of stock markets due to international financial crises, or large-scale wars) - should receive greater focus.

Research centred on the COVID-19 pandemic has offered some insight into 'black swans', those sudden and unexpected disruptions. Only in a very few projects was the potential of counterfactual analyses, based on comparative register data, utilised. This appears to be a promising avenue for assessing the stability and robustness of different social policy programmes and national social policies in the Member States. Similarly, the field of research aimed at modelling socio-ecological risks and the social policy responses that can be developed to address them, using innovative theoretical and methodological approaches, needs to be supported and institutionalised, by insuring better integration of research in the social and environmental fields.

Authoritarian populist movements, both within Europe and globally, pose a threat to the democratic institutions upon which the inclusive, enabling welfare state — with its social investment strategies — is founded and that it strongly supports. The politics of a sustainable Europe and a sustainable world should be underpinned by the rule of law, both nationally and internationally. Furthermore, instead of curtailing citizenship rights that intertwine social and environmental responsibilities, governments should strengthen institutions that provide individuals with the opportunity to fully realise and develop their capabilities.

As our review above has shown, depending on their institutional setups, social policy programmes vary in their ability to protect people from the diverse risks they encounter, whether these risks are "traditional" social risks such as old age, sickness, or unemployment, environmental risks, or unpredictable 'black swans'. Furthermore, the institutional frameworks determine the degree of social protection provided, and its impacts can differ significantly among various socio-economic groups.

Means-tested programmes are both cost-efficient and 'target effective', as they are strictly focused on those in need. However, as comparative research indicates, programmes targeted specifically at the poor often result in poorer distributional outcomes. Countries that rely heavily on means-tested social policies tend to experience higher levels of poverty compared to, for example, countries with more universal social policy. Additionally, non-contributory means-tested programmes may create divisions between the taxpayers who finance the scheme and the beneficiaries who receive support from it. This can lead to welfare backlash and legitimacy crises within the system. In contrast, strictly contribution-based schemes — whether statutory, collective labour market, or individual schemes — avoid such issues. These systems operate on the principle of "you get what you pay for". However, the downside is that individuals who cannot afford to contribute are excluded. Another limitation is that insurance-based schemes typically protect against specific social risks and are poorly equipped to address challenges posed by 'black swans'. Finally, universal social policies that combine basic security with a robust safety net for the needy and income-related benefits to other layers of society prove to be highly effective in

eliminating poverty and preventing welfare backlash. The trade-off, however, is that such a welfare state is expensive and requires high levels of taxation and employment to remain sustainable.

The considerations presented above necessitate studies into strategies outlining the appropriate role of the welfare state in fostering self-reliance and freedom while preventing dependency and the exploitation of those in vulnerable positions. Only societies with democratic and trustworthy institutions — societies that properly care for their members and assume responsibility for ecological sustainability — can be considered socially and economically sustainable.

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