



## Social Policy, Poverty, Inequality

Research cluster of the  
**German Institute of Development  
and Sustainability (IDOS)**



<https://www.idos-research.de/en/research/transformation-of-economic-and-social-systems/social-policy-poverty-inequality/>

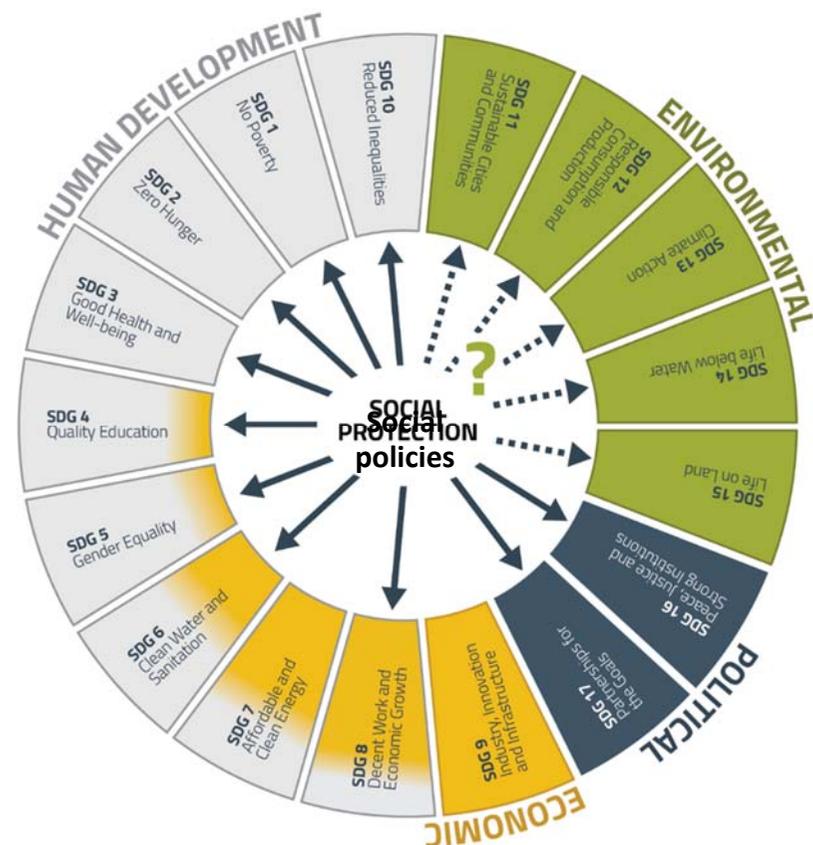
## Background

Social policies have at least three functions in development: First, they have a social / human development function. They provide support to people who do not (yet) benefit from economic development and structural transformation or suffer from individual hardships such as illness or loss of income. Additionally, they help to cushion collective shocks like financial crises, pandemics or some effects of climate change. Without social policies, SDGs 1 and 10 (reduction of income and multidimensional poverty and inequality) cannot be achieved. However, of course, social policies are also crucial for hunger elimination (SDG 2), better health (SDG 3) quality education for all (SDG 4), gender equality (SDG 5), access to drinking water, sanitation and energy (SDGs 6-7) and affordable housing and basic services (SDG 11).

Second, social policies have an economic function: by preventing people from falling into poverty, they strengthen these people's readiness to invest any of their savings in physical or human capital. Without social policies, households tend to hoard savings to be well prepared for future losses or unexpected expenditures. Social policies protect them against the most salient risks and incentivise low-income households in particular to invest into land, machines, health, training and education. In this way, they enable poor and vulnerable households to engage more in productive activities, increasing their productivity and income opportunities. They are thus a key ingredient for making growth pro-poor.

Third, social policies have a political function. They promote the inclusion of citizens, allow them to be more optimistic about the future and encourage them to participate in social life. Thereby, they promote social cohesion: feelings of belonging, solidarity with other citizens, trust in the government and readiness to invest in common goods. Also, social policies are a main duty of governments towards their citizens in sustainable social contracts, while the citizens in turn owe some degree of loyalty and the payment of taxes to the government. Social policies can thus strengthen the acceptability and stability of polity frameworks and reduce the risk that societies and states fall apart when structural transformation leads to significant economic and social upheaval.

As a result, social policies are not only essential for achieving the "social SDGs" (SDGs 1-6 and 10) but also the economic goals (SDGs 8-9) and the goals of peaceful and inclusive societies (SDG 16) and possibly even the environmental goals (SDGs 11-15) – hence all aspects of sustainable development.



Source: Loewe / Schüring (2021): Introduction to the Handbook on Social Protection Systems, Edward Elgar.

## Research agenda

The overarching question for our research is therefore: *What form should social policies take – depending on the respective context – to (i) reduce multidimensional poverty and inequality, (ii) strengthen the willingness of citizens to invest and promote pro-poor growth, (iii) promote social cohesion and (iv) support climate change mitigation and resilience?*

In particular, we search for answers on the following sub-ordinate questions:

- How do different social policy instruments interact with each other in different contexts? How should they be combined to form a consistent

overall system? How should they be connected with other policies (taxation, green economic policies, agricultural policies...)?

- How can multidimensional poverty and inequality be adequately measured (in particular in order to reflect adequately conflicts between the different goals of social policies)?
- How do social policies affect social cohesion and social contracts?
- How can social policies make structural transformations and green transitions inclusive?
- How can highly covariate shocks such as pandemics or climate change be dealt with?

With our research we hope to

- fill knowledge gaps on when and how social policies can enhance a virtuous circle of social, economic, and political development,
- inform policy makers and the general public on policy options and their respective effects,
- foster debates on the manifold effects that social policies can have,
- influence political decisions by means of evidence-based research.

Our comparative strength is that we, as a team, combine

- research on social policies with expertise on poverty and inequality measurement, private sector development, financial market expertise, taxation and climate change mitigation and adaptation,
- in-depth case-studies with analyses of development from a broader and multi-goal perspective,
- the use of various quantitative and qualitative research methods and
- extensive experience of working in different world regions.

In addition, our research is embedded in academic and policy networks on national and international levels such as the Global Partnership “Universal Social Protection 2030”, the MENA Social Protection Network, the African Economic Research Consortium (AERC) and the EADI Working Group ‘Social Protection’. Further research partners are the World Bank, the UNU-World Institute for Development Economics Research, the Kiel Institute for the World Economy and the Universities of Bath, Bonn, Bonn-Rhein-Sieg, Cairo, Hannover, Heidelberg, Manchester, Passau, Rome, Rotterdam and Siegen.



## Events

### What makes a social protection system?

Virtual panel discussion and launch of the *Handbook of Social Protection Systems*, in co-operation with socialprotection.org and University of Applied Science Bonn-Rhein-Sieg, 09 September 2021

### Social Protection and Universal Health Coverage in Ethiopia: Lessons and opportunities drawn from the COVID-19 pandemic

Virtual workshop, in co-operation with Friedrich-Ebert-Foundation and the International Labour Organization (ILO), 30 April 2021

### Covid-19 and its impact on the informal economy in Sub-Saharan Africa

Virtual workshop, in co-operation with Friedrich-Ebert-Foundation, 10 February 2021

### The Role of Social Protection in Cushioning the Effects of Pandemics

Virtual panel discussion, in co-operation with PEGNET, 29 January 2021

### The Covid-19 Pandemic and International Economic Support for MENA Countries

Virtual panel discussion, in co-operation with Friedrich-Ebert-Foundation, 03 December 2020

### Social protection and social cohesion

Public panel discussion and academic workshop, 04-05 December 2019

### Promoting social, economic and socio-political development through social protection

PEGNET Annual Conference, Bonn, hosted by IDIS and ZEF, 09-10 September 2019

### Community effects of Cash-for-Work programmes in Jordan

Academic workshop, Amman, 25 April 2019

### Employment creation through industrial policy in the MENA countries

Academic conference, Bonn, 21-22 September 2018

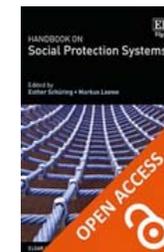


## Books and special issues

### Handbook on social protection systems

Esther Schüring and Markus Loewe (eds.) (2021), Cheltenham, UK: Edward Elgar.

<https://doi.org/10.4337/9781839109119>



### Social protection and social cohesion

Francesco Burchi, Markus Loewe and Daniele Malerba (eds.) (2022), European Journal of Development Research, special issue.

<https://www.palgrave.com/gp/journal/41287/volumes-issues/latest-issue>



### Social protection in the MENA countries: prospects for a new social contract?

Rana Jawad and Markus Loewe (eds.) (2018), International Social Security Review, special issue.

<https://onlinelibrary.wiley.com/toc/1468246x/2018/71/2>





## Academic publications - Selected ones since 2019

### Does economic growth reduce multidimensional poverty? Evidence from low- and middle-income countries

Balasubramanian, Pooja / Francesco Burchi / Daniele Malerba (2022), *World Development* 161, Article 106119

### Awareness of India's national health insurance scheme (PM-JAY): A cross-sectional study across six states

Parisi, Diletta / Swati Srivastava / Christoph Strupat et al. (2022), in: *Health Policy and Planning* 38(1)

### Disentangling the relationship between social protection and social cohesion: introduction to the special issue

Burchi, Francesco / Markus Loewe / Daniele Malerba / Julia Leininger (2022), *European Journal of Development Research* 34(3)

### Can integrated social protection programmes affect social cohesion? Mixed-methods evidence from Malawi

Burchi, Francesco / Federico Roscioli (2022), *European Journal of Development Research* 34(3)

### More than the sum of its parts: donor-sponsored cash-for-work programmes and social cohesion in Jordanian communities hosting Syrian refugees

Zintl, Tina / Markus Loewe (2022), *European Journal of Development Research* 34(3)

### The effects of social protection and social cohesion on the acceptability of climate change mitigation policies: what do we (not) know in the context of low- and middle-income countries?

Malerba, Daniele (2022), *European Journal of Development Research* 34(3)

### Social protection and social cohesion in times of the COVID-19 pandemic: evidence from Kenya

Strupat, Christoph (2022), in: *European Journal of Development Research* 34(3)

### Inequality and social cohesion in Africa: theoretical insights and an exploratory empirical investigation

Burchi, Francesco / Gabriela Zapata-Román (2022), *DIE Discussion Paper* 16/2022, Bonn: German Development Institute

### To regulate or not to regulate? Jordan's approach to digital ride-hailing platform Careem

Zintl, Tina (2022), *Labor and Politics in the Middle East and North Africa (POMEPS Studies* 45)

### Assessing trends in multidimensional poverty during the MDGs

Burchi, Francesco / Daniele Malerba / Claudio Montenegro / Nicole Rippin (2022), *Review of Income and Wealth* 68(S2)

### Willingness to take COVID-19 vaccination in low-income countries: evidence from Ethiopia

Strupat, Christoph / Zemzem Shigute / Arjun S. Bedi / Matthias Rieger (2022), in: *PLoS ONE* 17(3), Article e0264633

### Just transitions: a review of how to decarbonise energy systems while addressing poverty and inequality reduction

Malerba, Daniele (2022), *DIE Discussion Paper* 6/2022, Bonn: German Development Institute

### Economic effects of the Covid-19 pandemic on the informal economy: who has fallen into poverty?

Strupat, Christoph (2022), in: Rudolf Traub-Merz / Manfred Öhm / Julia Leininger / Florence Bonnet / Henrik Mailhack (eds.), *A majority working in the shadows: A six country opinion survey on informal labour in sub-Saharan Africa*, Bonn: Friedrich Ebert Stiftung

### The impact of social assistance programmes in a pandemic: evidence from Kenya

Strupat, Christoph / Emmanuel Nshakira Rukundo (2022), *ZEF Discussion Paper* 316, Bonn: The Center for Development Research

### Connections that matter: how the quality of governance institutions may be the booster shot we need to reduce poverty and inequality

Allen, Cameron / Julia Kercher / Anita Breuer / Julia Leininger / Pooja Balasubramanian (2022), Oslo: UNDP / German Development Institute

### Impacts and synergies of weather index insurance and microcredit in rural areas: a systematic review

Lu, Yu / Lu Yu / Wen-Jun Li / Maria Aleksandrova (2022), *Environmental Research Letters* 17(10), Article 103002

### Subsidy reform and the transformation of social contracts: the cases of Egypt, Iran and Morocco

Vidican Auktor, Georgeta / Markus Loewe (2022), *Social Sciences* 11(2)

### The social value of health insurance: results from Ghana

Garcia-Mandico, Silvia / Arndt Reichert / Christoph Strupat (2021), *Journal of Public Economics* 194

### State fragility, social contracts and the role of social protection: perspectives from the Middle East and North Africa (MENA) region

Loewe, Markus / Tina Zintl (2021), *Social Sciences* 10(12)

### Prioritarian rates of return to antipoverty transfers

Barrientos, Armando / Stephan Dietrich / Franziska Gassmann / Daniele Malerba (2021): *Journal of International Development* 34(3)

**Global access to COVID-19 vaccines: challenges in production, affordability, distribution and utilization**

Stamm, Andreas / Christoph Strupat / Anna-Katharina Hornidge (2021), DIE Discussion Paper 19/2021, Bonn: German Development Institute

**Strengthening social systems**

Strupat, Christoph / Paul Marschall (2021), in: OECD Development Co-operation Report 2020: learning from crises, building resilience, Paris: OECD Publishing

**Do social transfers benefit local economic development? The case of cash-for-work programmes in Jordan**

Loewe, Markus / Tina Zintl (2021), ERF Discussion Paper 1467, Cairo: Economic Research Forum

**Does food security matter to subjective well-being? Evidence from a cross-country panel**

Kornher, Lukas / Tekalign Gutu Sakketa (2021), Journal of International Development 33(8)

**Obesity and food away from home: what drives the socioeconomic gradient in excess body weight?**

Strupat, Christoph / Gabriela Farfan / Laura Moritz / Mario Negre / Renos Vakis (2021), Economics & Human Biology 43, Article 101048

**“Building Back Better” through social protection**

Aleksandrova, Mariya / Daniele Malerba / Christoph Strupat (2021), in: Bündnis Entwicklung hilft, Bochum: Ruhr University Bochum, 33-37

**An individual-based index of multidimensional poverty for low- and middle-income countries**

Burchi, Francesco / José Espinoza-Delgado / Claudio E. Montenegro / Nicole Rippin (2021), Journal of Human Development and Capabilities 22(4)

**Analysing the effect of climate policies on poverty through employment channels**

Malerba, Daniele / Kirsten Wiebe (2021), Environmental Research Letters 16(3)

**Social protection for climate-induced loss and damage: priority areas for increasing capacity and investment in developing countries**

Aleksandrova, Mariya et al. (2021), Red Cross Red Crescent Climate Centre

**Social protection and revenue collection: how they can jointly contribute to strengthening social cohesion**

Burchi, Francesco / Armin von Schiller / Christoph Strupat (2020), International Social Security Review 73(3)

**Women’s political representation and educational attainments: a district-level analysis in India**

Burchi, Francesco / Karan Singh (2020), Journal of South Asian Development 15(1)

**Mixed and multi-methods to evaluate implementation processes and early effects of the Pradhan Mantri Jan Arogya Yojana Scheme in seven Indian states**

De Allegri, Manuela / Swati Srivastava / Christoph Strupat et al. (2020), International Journal of Environmental Research and Public Health 17(21)

**Mitigating poverty: the patterns of multiple carbon tax and recycling regimes for Peru**

Malerba, Daniele / Anja Gaentzsch / Hauke Ward (2020), Energy Policy 149, Article 111961

**Social assistance and inclusive growth,**

Barrientos, Armando / Daniele Malerba (2020), International Social Security Review 73(3)

**Subjective returns to education: rational expectations of disadvantaged groups in India**

Balasubramanian, Pooja (2020), Wider University Working Paper 144

**Poverty alleviation and local environmental degradation: an empirical analysis in Colombia**

Malerba, Daniele (2020), World Development 127

**Social protection schemes in the Middle East and North Africa: not fair, not efficient, not effective**

Loewe, Markus (2019), in: Rana Jawad / Nicola Jones / Mahmood Messkoub (eds.), Social policy in the Middle East and North Africa: the new social protection paradigm and universal coverage, Cheltenham: Elgar

**Linking social protection schemes: the joint effects of a public works and a health insurance programme in Ethiopia**

Shigute, Zemzem / Christoph Strupat / Francesco Burchi / Getnet Alemu / Arjun S. Bedi (2019), The Journal of Development Studies 56(2)

**Labor-intensive public works programs in sub-Saharan Africa: experiences and implications for employment policies**

Sakketa, Tekalign Gutu / Joachim von Braun (2019), ZEF Working Paper 180, Bonn: Center for Development Research

**Principles and considerations for mainstreaming climate change risk into national social protection frameworks in developing countries**

Aleksandrova, Mariya (2019), Climate and Development 12(6)

**Poverty-energy-emissions pathways: recent trends and future sustainable development goals**

Malerba, Daniele (2019), Energy for Sustainable Development 49

**Social protection as a tool to address slow onset climate events: emerging issues for research and policy**

Aleksandrova, Mariya (2019), DIE Discussion Paper 16/2019, Bonn: German Development Institute



## Policy briefs and opinion papers - Selected ones since 2018

### **Social protection: An effective shield against global crises**

Burchi, Francesco / Markus Loewe (2022), The Current Column of 04 October 2022, Bonn: German Institute of Development and Sustainability (IDOS)

### **The impact of carbon taxation and revenue redistribution on poverty and inequality**

Malerba, Daniele et al. (2022), Policy Brief 11/2022, Bonn: German Institute of Development and Sustainability (IDOS)

### **Social protection and social cohesion are key for climate action**

Malerba, Daniele (2022), www.developmentresearch.eu, 18 August 2022

### **A socially just transformation through integrated social protection 'Plus' programming**

Böhl, Mauricio et al. (2022), Policy Brief, T7 Task Force Social cohesion

### **Achieving globally equitable vaccine supply**

Strupat, Christoph (2022), The Current Column of 21 February 2021, Bonn: German Institute of Development and Sustainability (IDOS)

### **A critique on the increasing role of finance in social policy**

Balasubramanian, Pooja (2021): The Current Column of 15 December 2021, Bonn: German Development Institute

### **Social protection: a powerful tool – but not in the Middle East and North Africa**

Loewe, Markus (2021), www.menasp.com, 01 March 2021

### **Reaching the poorest and most vulnerable: addressing loss and damage through social protection**

Aleksandrova, Mariya / Cecilia Costella (2021), Current Opinion in Environmental Sustainability (50), 121-128

### **Weather index insurance: promises and challenges of promoting social and ecological resilience to climate change**

Yu, Lu / Mariya Aleksandrova (2021), DIE Briefing Paper 14/2021, Bonn: German Development Institute

### **The untapped potential of global climate funds for investing in social protection**

Aleksandrova, Mariya (2021), DIE Briefing Paper 7/2021, Bonn: German Development Institute

### **The hidden value of social health insurance: breaking the intergenerational poverty trap?**

Strupat, Christoph (2021), poverty-unpacked.org, 24 February 2021

### **COVID-19 vaccination for all!**

Marschall, Paul / Christoph Strupat (2021), The Current Column of 1 February 2021, Bonn: German Development Institute

### **Universal basic income: social transfers stabilise aggregate demand**

Loewe, Markus (2020), Development and Cooperation, 6 May 2020

### **The urgency of public works programmes**

Braun, Joachim von / Tekalign Sakketa (2020), Development and Cooperation, 21 April 2020

### **Revenue collection and social policies: their underestimated contribution to social cohesion**

Burchi, Francesco / Christoph Strupat / Armin von Schiller (2020), DIE Briefing Paper 1/2020, Bonn: German Development Institute

### **How “One Health” can prevent pandemics**

Strupat, Christoph / Paul Marschall (2020), The Current Column of 29 April 2020, Bonn: German Development Institute

### **Why social protection is crucial in the corona crisis**

Strupat, Christoph / Daniele Malerba / Francesco Burchi (2020), The Current Column of 26 March 2020, Bonn: German Development Institute

### **The COVID-19 pandemic crisis and poor people's struggle for survival**

Sakketa, Tekalign Gutu/ Lukas Kornher (2020), ZEF Policy Brief 33, Bonn: The Center for Development Research

### **Africa's social capital – strong enough for coping with COVID-19?**

Sakketa, Tekalign Gutu (2020), Rural 21, 29 April 2020

### **Impeded migration as adaptation: COVID-19 and its implications for translocal strategies of environmental risk management**

Stange, Gunnar et al. (2020), Environmental Migration Portal, 22 October 2020

### **Modicare could help India's poor population**

Strupat, Christoph (2019), The Current Column of 11 March 2019, Bonn: German Development Institute

### **Multidimensional poverty trends and horizontal inequalities: new insights from the G-CSPI database**

Burchi, Francesco / Daniele Malerba / Nicole Rippin (2019), One Pager 434, Brasilia: The International Policy Centre for Inclusive Growth

### **What makes economic empowerment programmes successful?**

#### **Experimental evidence from Malawi**

Burchi, Francesco / Christoph Strupat (2019), One Pager 423, Brasilia: The International Policy Centre for Inclusive Growth

### **Why our narrow view of poverty hinders its eradication**

Malerba, Daniele / Francesco Burchi (2019), The Current Column of 17 October 2019, Bonn: German Development Institute



## The Team - not including associate and guest researchers



**Pooja Balasubramanian**

[pooja.balasubramanian@idos-research.de](mailto:pooja.balasubramanian@idos-research.de)

- Social protection and structural change
- Female empowerment



**Mauricio Böhl Gutierrez**

[mauricio.boehl@idos-research.de](mailto:mauricio.boehl@idos-research.de)

- Social dimension and political economy of carbon pricing
- Public acceptability



**Francesco Burchi**

[francesco.burchi@idos-research.de](mailto:francesco.burchi@idos-research.de)

- Design of social protection policies
- Effects on poverty and food security
- Social cohesion
- Graduation programmes
- Gender issues



**Markus Loewe**

[markus.loewe@idos-research.de](mailto:markus.loewe@idos-research.de)

- System building in social protection;
- Social insurance; micro-insurance; cash-for-work
- Subsidy reforms
- Social protection, investment and economic development
- Social contracts



**Daniele Malerba**

[daniele.malerba@idos-research.de](mailto:daniele.malerba@idos-research.de)

- Just transitions
- Environmental fiscal reforms (carbon taxes plus social protection)
- Public acceptability



**Tekalign Gutu Sakketa**

[tekalign.sakketa@idos-research.de](mailto:tekalign.sakketa@idos-research.de)

- Weather index insurance
- Relation between macro and micro-insurance
- Effectiveness of the Africa risk capacity
- Index insurance and conflict



**Alina Sowa**

[alina.sowa@idos-research.de](mailto:alina.sowa@idos-research.de)

- Labour Economics
- Gender Inequality
- Health Insurance



**Alexander Stöcker**

[alexander.stoecker@idos-research.de](mailto:alexander.stoecker@idos-research.de)

- Gender inequality
- Labour-market policies
- Social mobility



### Christoph Strupat

[christoph.strupat@idos-research.de](mailto:christoph.strupat@idos-research.de)

- Design of health and social protection policies
- Health Insurance
- Health systems
- One Health
- Gender inequality



### Tina Zintl

[tina.zintl@idos-research.de](mailto:tina.zintl@idos-research.de)

- Labour-market policies
- Cash-for-work
- Decent jobs in the digital economy
- Gender issues
- Social contracts



### Mariya Aleksandrova (in Research Programme C)

[mariya.aleksandrova@idos-research.de](mailto:mariya.aleksandrova@idos-research.de)

- Adaptation and Loss and Damage Governance
- Just transitions for resilience to climate change
- Climate funds

## IDOS

The German Institute of Development and Sustainability (IDOS) (formerly German Development Institute / Deutsches Institut für Entwicklungspolitik, DIE) is located in the UN City of Bonn and is one of the world's leading research institutions and think tanks for global sustainable development. Our work is based on the interplay between research, policy advice and training. The IDOS is building bridges between theory and practice.

The research is theory-based, empirically driven and application-oriented. It provides the basis for the activities in policy advice of the Institute. We develop policy-relevant concepts, advises ministries, governments and international organisations, and refers to current policy issues. The training programmes of the Institute for university graduates and young professionals are integrated into the research and advisory process.



### Contact

#### German Institute of Development and Sustainability (IDOS)

Tulpenfeld 6

D-53113 Bonn, Germany

Phone +49 228 94 927-0

Fax +49 228 94 927-130

[www.idos-research.de](http://www.idos-research.de)

#### For the research cluster:

##### Markus Loewe

[markus.loewe@idos-research.de](mailto:markus.loewe@idos-research.de)

Phone +49 228 94 927-154

Fax +49 228 94 927-130