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研究課題名（和文）「社会投資政策」の効果の検証 OECD諸国の技能形成、教育、経済成長、雇用、平等

研究課題名（英文）Social Investment Policy, Economic Performance, and Welfare States: Growth, Employment, and Equality

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研究成果の概要（和文）：本研究の目的は、先進諸国で近年採用されている社会投資政策が、政府が期待するような社会経済効果を生むのか、いかなる効果を持っているのかを明らかにすることである。先進20か国における(1)社会投資政策の性質・規模と(2)経済成長・雇用・所得格差・生産性との間の関係を、分析し明らかにする。先進諸国政府は、同政策が人的資本投資を促すことによって、知識集約的な新しい経済や技術革新に適應できる、高技能な労働者を養成し、経済成長を確保するだけでなく、労働者の失業、世帯の所得格差の問題を緩和し、ひとり親家庭、非正規雇用、教育格差などの新しい社会リスクも軽減する、ことを期待している。

#### 研究成果の学術的意義や社会的意義

社会投資政策が経済成長を促進し、所得格差・貧困の緩和につながる影響を持っていることが結果に出たことは、各国政府が社会投資政策を実行することが合理的なものであるということの一部を示した。しかし、厳密には、社会投資政策の影響は、その政策の種類や経済結果の種類によって違うことも分かっている。たとえば、社会投資政策には教育、家族支援政策、労働市場政策などがあるが、それらの影響は対象にしている経済効果によっても違ってくるし、社会投資政策の種類によっても違ってくる。この現実には複雑な効果を総合的に明らかにしていくことがこれからの研究課題として望まれる。

研究成果の概要（英文）：The purpose of this study is to examine the effects of social investment policies on socio-economic outcomes, such as economic growth, employment, income inequality, and poverty. The study first measures social investment policies implemented by affluent countries. Then, it statistically analyzes whether those social investment policies promote economic growth and employment and reduce income inequality and poverty. The study finds that social investment policies promote economic growth. They also reduce income inequality and poverty, but their equalizing effects are limited without government redistribution and more effective with redistribution.

研究分野：Comparative political economy

キーワード：Social investment policy Education policy Family support policy ALMP Economic growth Income inequality Poverty

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## 1. 研究開始当初の背景

特に EU 諸国で積極的に採用されてきた社会投資政策の研究分野においては、社会投資政策がどのような政策で、どのような経緯で採用されだしたかなどについては研究はあったが、社会投資政策に実際に政策目標を達成する効果があるのかについては研究がほとんどなかった。社会投資政策は人的資本形成、アクティベーションなどを通して、雇用や経済成長につながり、シングルマザー家庭などの新しい社会リスクなどへの対応にもなり得るものとしてその政策効果が期待されていた。社会投資政策の効果の影響を見定めるのが本研究プロジェクトであった。

## 2. 研究の目的

教育政策、家族支援政策、積極的労働市場政策などの社会投資政策が、経済成長、生産性の成長、雇用の促進、所得格差や貧困の緩和に成功しているのか否かを実証分析するのが目的であった。

## 3. 研究の方法

上記社会投資政策を測り、それら政策が経済成長、生産性の成長、雇用の促進、所得格差や貧困の緩和に貢献しているのかを、統計分析するのが研究方法だった。

## 4. 研究成果

分析結果を3本の学術誌論文として発表した。

“Four worlds of productivity growth: A comparative analysis of human capital investment policy and productivity growth outcomes.” *International Political Science Review* (2018) では次の結果を報告した。Labor productivity is an important determinant of the wealth of national economies and standards of living, as its growth explains half of per capita GDP growth. I show that there are four worlds of productivity growth among industrialized countries, by decomposing labor productivity growth into multifactor productivity (MFP) growth and capital deepening. The four worlds that emerge from the analysis are: (1) human capital investment- and MFP growth-dominant Nordic countries; (2) physical capital investment- and labor productivity growth-dominant liberal countries; (3) continental European countries whose moderately high human capital investments create decently high MFP growth, but whose low physical capital investments push down their labor productivity; and (4) South European countries with both the lowest human capital investment and lowest productivity growth. The four worlds are a result partly of the countries' partisan politics, economic growth strategies, and human capital formation policies – different policies add differently to the components of labor productivity.

“Social Investment Policy, Economic Growth, and Welfare States: Channels of Pro-Growth Effects of Policy.” *Social Forces* (2020) では次の結果を報告した。Social investment (SI) policies have been popular among industrial countries in the past two decades. Governments hope that SI policies will promote productivity and economic growth by creating high-skill labor forces that can adapt to the imperatives of the new knowledge economy and technological advances, or that can create new technologies themselves. They also hope that SI policies will mitigate new social risks, such as single-parent families and workers in precarious employment by better preparing workers for jobs and promoting social inclusion.

However, little research exists that empirically investigates whether or not SI policies really produce these positive outcomes. Of all economic outcomes, this paper focuses on economic growth and the channels of economic growth—multifactor productivity (MFP), physical capital investment, and labor input—and investigates whether SI policies promote growth in GDP and its channels. Data from 17 industrial countries are analyzed. The analysis finds that family support, education, and ALMP spending (all measured as spending per child, student, and an unemployed person, respectively) is positively associated with MFP and GDP growth, and that MFP growth is the main channel through which SI policies enhance GDP growth. Education spending boosts the growth of all of MFP, physical capital stock, labor input, and GDP growth via those channels. While family support does not promote the growth of labor input, the results suggest that larger family support spending leads to higher levels of labor input. Overall, these types of SI spending have generally positive effects on economic growth.

“Do social investment policies reduce income inequality? An analysis of industrial countries.” *Journal of European Social Policy* (2021)では次の結果を報告した。Scholars and policymakers who call for social investment (SI) policies hope that SI policies reduce income inequality and poverty, among other policy goals. Meanwhile, some others point out potentially less pro-poor effects of SI policies. There are relatively few cross-national studies that empirically examine the distributional effects of SI policies. The current study seeks to fill the gap by investigating the effects of SI policies on income inequality in OECD countries. The empirical analysis finds mixed results. Parental leave benefits reduce market income inequality, but other family support policies do not lessen inequality, and family allowances and paid leave (the length of generous leave) even increase it. The effects of some family policies are partly context-specific. In contexts where there are a large number of single-mother households, parental leave benefits reduce market income inequality. There is no stable evidence that education and active labour market policy (ALMP) reduce market income inequality. Education and ALMP, however, reduce disposable income inequality (even after controlling for left governments and Nordic countries). The article suggests that in countries with high education and/or ALMP spending, the skills of workers towards the lower end of the income distribution may be relatively high (even though their pre-tax and transfer income may be low), and it may make their income salvageable with redistributive policies. In this sense, SI policies and conventional redistributive policies may be complementary in reducing disposable income inequality.

また、もう1セットの分析結果を論文にまとめ、現在学術誌で審査中である。” *Poverty, Social Investment Policy, and Redistribution: An Analysis of the Equalizing Effects of Social Investment Policy.*” Social investment (SI) policies have been implemented by governments of affluent countries in hopes of safeguarding against new social risks and mitigating social exclusion by encouraging employment and making it easier for parents to balance work and family. Governments hope that human capital investment (education and job training) will better prepare workers for jobs, promote their employment and social inclusion, and reduce poverty. This paper investigates whether SI policies contribute to lower poverty and inequality by analyzing data from 18 OECD countries between 1980 and 2013. The analysis finds, first, that SI policies (education and active labor market policy) alone may be less effective in generating lower poverty and inequality without redistribution, but when accompanied and supported by

redistribution, SI policies are more effective in creating lower poverty and inequality. I propose the explanation that SI policies create lower income poverty and inequality by creating individuals and households that can be salvaged and lifted out of poverty with redistribution, because SI policies help improve their skills and knowledge and employability, although they may be not quite able to escape poverty or low income without redistribution. As partial evidence, I present the result that education is associated with a lower poverty gap in market income. The analysis also finds that education and active labor market policy (ALMP) produce lower poverty and/or inequality in interaction with social market economies which redistribute more, and that augments the equalizing effects of education and ALMP. The results, thus, suggest the complementary roles of SI policies and redistribution. Overall, (1) education spending is negatively associated with inequality in both market and disposable incomes; (2) education spending is negatively associated with disposable income poverty. It is negatively associated also with market income poverty, but only if accompanied by SMEs. Education spending helps to reduce the poverty gap in market incomes and thus helps poverty reduction through redistribution; (3) ALMP spending is negatively associated with inequality and poverty in disposable incomes but not in market incomes, and there is no effect on the poverty gap. However, ALMP spending is negatively and significantly associated with market income poverty when interacted with SMEs.

5. 主な発表論文等

〔雑誌論文〕 計2件（うち査読付論文 2件／うち国際共著 0件／うちオープンアクセス 0件）

1. 著者名 Takayuki Sakamoto	4. 巻 31
2. 論文標題 “Do Social Investment Policies Reduce Income Inequality?: An Analysis of Industrial Countries.”	5. 発行年 2021年
3. 雑誌名 Journal of European Social Policy	6. 最初と最後の頁 440-456
掲載論文のDOI（デジタルオブジェクト識別子） 10.1177/09589287211018146	査読の有無 有
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1. 著者名 Takayuki Sakamoto	4. 巻 -
2. 論文標題 Social Investment Policy, Economic Growth, and Welfare States: Channels of Pro-Growth Effects of Policy	5. 発行年 2020年
3. 雑誌名 Social Forces	6. 最初と最後の頁 -
掲載論文のDOI（デジタルオブジェクト識別子） 10.1093/sf/soz178	査読の有無 有
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1. 発表者名 Takayuki Sakamoto
2. 発表標題 “Do Social Investment Policies Reduce Income Inequality?: An Analysis of Industrial Countries.”
3. 学会等名 The annual meeting of the Midwest Political Science Association, Chicago（国際学会）
4. 発表年 2021年

1. 発表者名 Takayuki Sakamoto
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3. 学会等名 the General Conference of the European Consortium of Political Research（国際学会）
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〔図書〕 計0件

〔産業財産権〕

〔その他〕

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6. 研究組織		
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7. 科研費を使用して開催した国際研究集会

〔国際研究集会〕 計0件

8. 本研究に関連して実施した国際共同研究の実施状況

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