This guide is addressed to people that will classify and upload CONTENT (publications, news, events, databases, programmes profiles, and much more) to socialprotection.org. The aim of this guide is to provide a theoretical background to classify the content according to our taxonomy.
1. Background

“As per the request of the G20 Development Working Group, the prototype of the Social Protection Knowledge Sharing Gateway was developed in July 2012 with the intention of serving as a repository of learning resources on social protection to policymakers, development practitioners and specialists, with a focus on MICs, LICs and on South-South and Triangular Cooperation. The unbranded platform, hosted by the United Nations Development Programme (UNDP Brazil), and funded by the Department of Foreign Affairs and Trade (DFAT) of Australia and the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ), represents an amalgamation of multiple databases on social protection. It also hosts online communities, organises webinars and events, and provides access to curated and up-to-date content on social protection.”

Please also refer to the ‘Technical Content Inclusion Guidelines’ for how to practically upload content.

2. Content

The socialprotection.org platform hosts a variety of content (publications, news, events, programme profiles etc.) about social protection. We use a broad definition of social protection that is accepted by multiple organisations and agencies that are members of the Social Protection Inter-Agency Board (SPIAC-B).

“Social protection is a set of policies and programmes aimed at preventing and protecting all people against poverty, vulnerability and social exclusion, throughout their life cycle placing a particular emphasis on vulnerable groups. This means ensuring adequate protection for all who need it, including children; people of working age in case of maternity, sickness, work injury or for those without jobs; persons with disability and older persons. This protection can be provided through social insurance,
tax-funded social benefits, social assistance services, public works programmes and other schemes guaranteeing basic income security and access to essential services.”

For an overview of different definitions of social protection, please refer to the ‘What is Social Protection?’ section of the socialprotection.org’s Glossary.

For the sake of determining what type of content is relevant social protection content to the platform’s general database, we define that:

1. Social protection is understood as part of the broader social policy field. However, socialprotection.org offers content social protection specifically, and does not focus on other social policy areas (e.g., health, education, agriculture, housing). Content about these other social policy areas may be relevant when presented and discussed as cross-cutting themes in relation to social protection. For instance, content about school feeding programmes (classified as a social assistance programme) often cuts across relevant discussions related to the education policy area.

2. In broad terms, social protection consists of social assistance, social insurance, and labour market policies and programmes implemented by a government, with possible financial and/or technical support from International Organisations (IOs) and/or bilateral agencies. However, relevant social protection content is not restricted to content about governmental social protection measures. This is because non-governmental experiences of social protection provision also aggregate value to the social protection knowledge base of information and evidence. Other experiences can be:
   a. Informal social protection experiences among individuals, households, and communities, which represent an important support tool in many countries, especially low-income countries, where social protection systems are weak or even inexistent.
   b. Programmes and interventions designed and implemented by NGOs, CSOs, and donor agencies (with or without the involvement of governments).

____________________

3. The socialprotection.org taxonomy and filters

On socialprotection.org, content (Publications, News, Events, etc.) is classified by four main taxonomic categories: Social Protection Programmes; Social Protection Building Blocks; Social Protection Approaches, and Cross-Cutting Areas; along with a range of other filters related to Year; Geographic Area (Country and Region); Authorship; Population Group; and Document Format.

In the sections below, we describe each of the above listed categories and the definitions for each term.

Following are each taxonomic category explained (as well as their respective subcategories). Click on the hyperlinked subcategories for a definition.

**Social Protection Programmes**

Different organisations may classify social protection programmes in different ways. However, there is a predominant view in the literature that social protection programme types can be classified under the categories of social assistance, social insurance, and labour market/employment policies and programmes.

**Social assistance** consists of non-contributory programmes financed mostly through governmental tax revenues, targeting vulnerable populations, such as those living below a certain level of income or asset possession. Examples are cash transfers, school feeding programmes, food assistance, and living subsidies. **Social insurance** consists of contributory public schemes, financed usually by contributions from workers and/or their employers, to provide protection for insured individuals and their families in the case of income loss. Examples are maternity benefits, old age-pension, and work injury insurance. Finally, **labour market policies** consist of several types of measures targeted at workers, unemployed persons, and vulnerable groups to secure unemployment protection and employment promotion. Examples are unemployment benefits, job training, and public works programmes.

Socialprotection.org has developed a classification of programmes similar to the classification adopted by the Inter Agency Social Protection Assessments (ISPA) in its Data Collection Framework (CODI).
Please note that some content may explicitly mention which programme category(ies), or programme type(s) is being discussed. However, in some cases, only programme names may be mentioned in the content (e.g., Bolsa Família). In such cases, the user adding the content to the platform should search inside the text for the type of programme (e.g., Conditional Cash Transfer, social pension, job training) and classify the content according to the corresponding programme category and type.

❖ Social assistance
  ➢ Social transfers
    ▪ Cash transfers
      • Conditional cash transfers
      • Unconditional cash transfers
      • Cash plus
      • Social pensions
      • Universal Basic Income
    ▪ In kind transfers
      • Conditional in-kind transfers
      • Unconditional in-kind transfers
      • School feeding programmes
      • Nutritional programmes
      • Voucher
  ➢ Subsidies
    ▪ Price subsidies
      • Food subsidies
      • Fuel, water, and electricity subsidies
      • Housing subsidies
      • Agricultural input subsidies
    ▪ Service subsidies
      • Educational fee waiver
      • Health benefits / reduced medical fee
      • Transport subsidies
  ➢ Social care services
  ➢ Tax credits / exemptions

❖ Social insurance

5
➢ Disability pension
➢ Funeral grants
➢ Survivors pension
➢ Public health insurance
➢ Maternity / Paternity / Parental benefits
➢ Old-age pension
➢ Work injury benefits
➢ Family and child allowance

❖ Labour market / employment programmes
➢ Active labour market programmes/Productive inclusion
  ▪ Public works programmes
    • Cash for work
    • Food for work
  ▪ Public procurement from self-employed, microentrepreneurs and smallholder farmers
  ▪ Productive/economic inclusion programmes
  ▪ Job training
  ▪ Employment / Wage subsidies
  ▪ Entrepreneurship/Start-up incentives
  ▪ Labour market services
➢ Passive labour market policies
  ▪ Unemployment benefits
    • Unemployment insurance (contributory)
    • Unemployment assistance (non-contributory)
  ▪ Early retirement for labour market reasons

Social Protection Building Blocks
Social Protection Building Blocks are the different levels of the social protection system, which are:

Policy: overall level where decisions are made and translated into legal frameworks, coordination mechanisms and institutional arrangements, financing strategies, monitoring and evaluation decisions, etc.
**Programme design**: the individual programmes design features, such as their eligibility criteria, targeting mechanisms, and benefit design, including their value, duration, modality, frequency, condition.

**Programme implementation**: also called the delivery chain of social protection and covers the underpinning systems of programmes that make their delivery possible, such as processes of enrolment and registration, payments delivery, appeal mechanisms, data and information systems, etc.

**Programme performance/ impact analysis**: this category has been added to account for content that is not about any specific building block. Plenty of content added to the platform are results of programme assessments or studies of different aspects and outcomes of social protection programmes that are not related to any building block and its levels. These can be studies of socio-economic impacts/programme outcomes, e.g., the impact of a cash transfer on beneficiaries’ human capital or other life decisions.

❖ **Policy**

➢ Situation analysis / needs assessment
➢ Coverage
➢ Laws and Policies
➢ Expenditure and financing
➢ Monitoring and evaluation systems
➢ Governance and coordination

❖ **Programme design**

➢ Benefits design
➢ Conditionalities
➢ Eligibility criteria
➢ Targeting

❖ **Programme implementation**

➢ Enrolment / registration
➢ Benefits payment / delivery
➢ Feedback and complaints mechanisms
➢ Information systems (MIS, Social Registry, Integrated Registry)
➢ Outreach / communications and awareness
Programme performance / impact analysis

Social Protection Approaches
This field consists of different social protection concepts and theoretical approaches and are to be marked when explicitly discussed or used as analytical lenses in the content being added to the platform.

- Adaptive social protection
- Child-sensitive social protection
- Digital social protection
- Gender-sensitive social protection
- Informal social protection
- Political economy
- Programme graduation
- Shock-responsive social protection
- Social protection definitions and features
- Social Protection Floors
- Social protection systems
- Sustainable livelihoods
- Universal Social Protection

Cross-Cutting Areas
Very often a relevant publication, webinar, or blog on social protection also discusses other policy areas and issues. These are called cross-cutting areas and are classified to help users narrow their search for content on the platform.

- Agriculture and rural development
- Child Protection
  - Child marriage
  - Child labour
- Climate change
  - Climate Change Adaptation
  - Climate Change Mitigation
Consumption and expenditure
Disability
Disaster Risk Management/Disaster Risk Reduction
Education
Environment
Financial education and inclusion
Food and nutritional security
Gender
  Gender-based violence
  Women's empowerment
  Unpaid care work
  Wage inequality
Global Development Agenda (SDGs / MDGs)
Health
  Child health
  COVID-19
  HIV / AIDS
  Maternal health
Housing and infrastructure
Human capital
Human rights
Humanitarian assistance
Humanitarian–social protection nexus
Inclusive growth
Income inequality
Labour market / employment
  Informality
  Unemployment
Microfinance
Migration
  Remittances
Poverty reduction
Productive/Economic inclusion
Resilience
South–South cooperation
Water, sanitation, and hygiene

Population Group
Population group is the group that the content is talking about and not necessarily the target group a social protection programme being discussed in the content.

- Children
- Adolescents
- Youth
- Working age group
- Elderly persons
- Women
  - Mothers, Pregnant, Lactating women
  - Girls
- Ethnic groups
- People living with HIV / AIDS
- Persons with disabilities
- Migrants
- Refugees
- Poor households
- LGBTIQA+

Document format
- Toolkit
- Guideline
- One pager
- Report
- Working papers
- Event outcome
- Joint statement
- Executive summary
- Article
- Policy brief
- Handbook
4. List of Definitions

**Active labour market programmes/Productive inclusion**
“Generally, active labour market programmes (ALMP) are policies that seek to help the unemployed and the most vulnerable to find jobs. In high-income countries, such policies mostly extend to formal workers. In developing countries – with labour markets characterised by higher informality and lower unemployment than in higher-income countries – active labour market policies often include anti-poverty measures and blend interventions”.

*Examples: matching jobseekers with vacancies; skills training for jobseekers; employment subsidies; job creation policies through public sector employment, or subsidies to for private sector work.*

Sources:

**Adaptive social protection**
“Adaptive Social Protection was initially conceptualized as a series of measures which aim to build resilience of the poorest and most vulnerable people to climate change by combining elements of social protection, disaster risk reduction and climate change. Since then, it has evolved to entail the need to better prepare for, cope with, and adapt to all types of shocks, protecting people's wellbeing and livelihood”.


**Agricultural input subsidies**
“Agricultural input subsidies can refer to: keeping the prices low for certain agricultural goods; providing them free of charge; grants (or loans, if repaid at below the market price) given to a farmer as a means of reducing the market price of a specific input used in agricultural production”.
Agriculture and rural development

“Agricultural development is defined as the process that creates the conditions for the fulfilment of agricultural potential. Those conditions include the accumulation of knowledge and availability of technology as well as the allocation of inputs and output”.


Benefits design

“Benefit design is concerned with policy decisions regarding the entitlements, in terms of both services and population groups, which are either funded from public revenues, or publicly mandated. Benefit design also concerns defining conditions of access to these entitlements. Benefit design considers how all public revenues for individual health services are used, not only those in schemes with explicitly defined entitlements, or those serving a limited population. Benefit design is also concerned with policies regarding the use of private revenues for publicly mandated benefits”.


Benefits payment / delivery

“Benefits delivery systems “are the operating environment for implementing social protection benefits and services. That operating environment is anchored in core implementation phases along the delivery chain. These phases are common to most programs and include outreach, intake and registration, assessment of needs and conditions, eligibility and enrolment, payments of benefits and provision of services, and monitoring and management, including beneficiary exits. People and institutions interact all along the delivery chain. Those interactions are facilitated by communications, information systems, and technology, among other factors”.

Cash for work
“Cash transfers distributed to vulnerable individuals or households in exchange for labour”.

Cash plus
Cash plus “refers to complementary programming where CTP [cash transfer programme] is combined with other modalities or activities. Complementary interventions may be implemented by the same agency/agencies providing CTP, or potentially by other agencies working in collaboration. Examples might include provision of training and/or livelihood inputs, or behavioural change communication programmes”.

Cash transfers
“Cash transfers are monetary assistance distributed to individuals and households. In this category are implicitly included: Non-contributory funeral grants; Non-contributory unemployment benefits; Non-contributory disability benefits; Non-contributory old age pensions”.

Child health
“Children's health is the extent to which individual children or groups of children are able or enabled to (a) develop and realize their potential, (b) satisfy their needs, and (c) develop the capacities that allow them to interact successfully with their biological, physical, and social environments”.
Child labour

“The term “child labour” is often defined as work that deprives children of their childhood, their potential, and their dignity, and that is harmful to physical and mental development. (...) The worst forms of child labour involve children being enslaved, separated from their families, exposed to serious hazards and illnesses and/or left to fend for themselves on the streets of large cities – often at a very early age. Whether or not particular forms of “work” can be called “child labour” depends on the child’s age, the type and hours of work performed, the conditions under which it is performed, and the objectives pursued by individual countries. The answer varies from country to country, as well as among sectors within countries”.

Source: ILO. 2017. What is Child Labour.

Child marriage

“Child marriage, also referred to as early marriage, is any marriage where at least one of the parties is under 18 years of age. A child marriage is considered to be a form of forced marriage, given that one and/or both parties have not expressed full, free and informed consent”.


Child Protection

“Child protection are measures to ensure that children are protected from all forms of abuse and exploitation, such as child labour, child prostitution, or the adversities faced by the girl child, street children, children with disabilities, and children under armed conflict. Child protection systems comprise the set of laws, policies, regulations and services needed across all social sectors. These systems are part of social protection and extend beyond it”.

14
Child-sensitive social protection

“Child-sensitive social protection is an evidence-based approach that aims to maximize opportunities and developmental outcomes for children by considering different dimensions of children’s well-being. It focuses on addressing the inherent social disadvantages, risks and vulnerabilities children may be born into, as well as those acquired later in childhood due to external shocks. It is thus best achieved through integrated social protection approaches”.


Climate change

“Climate change refers to a change in the state of the climate that can be identified (e.g., by using statistical tests) by changes in the mean and/or the variability of its properties and that persists for an extended period, typically decades or longer. Climate change may be due to natural internal processes or external forcings such as modulations of the solar cycles, volcanic eruptions and persistent anthropogenic changes in the composition of the atmosphere or in land use. Note that the Framework Convention on Climate Change (UNFCCC), in its Article 1, defines climate change as: ‘a change of climate which is attributed directly or indirectly to human activity that alters the composition of the global atmosphere and which is in addition to natural climate variability observed over comparable time periods.’ The UNFCCC thus makes a distinction between climate change attributable to human activities altering the atmospheric composition and climate variability attributable to natural causes”.


Climate change

“Climate change means a change of climate which is attributed directly or indirectly to human activity that alters the composition of the global atmosphere and which is in addition to natural climate variability observed over comparable time periods”.

Climate Change Adaptation

“Adaptation to climate change requires mitigating its effects, such as the intensity and frequency of extreme weather, the consequences of temperature variations, or the impacts on food security, livelihoods, and human health. It is also vital that attention be paid to three elements: exposure, sensitivity, and the adaptive capacity of populations. (...) There are three main pathways to adaptation, which include an array of structural (engineered, technological, ecosystem-based), institutional (laws and regulations, government policies, economic) and societal (educational, informational, behavioural, social services, sociodemographic) options to reduce vulnerability and enhance adaptive capacity”.


Climate Change Mitigation

“Climate change mitigation “means making the impacts of climate change less severe by preventing or reducing the emission of greenhouse gases (GHG) into the atmosphere. Mitigation is achieved either by reducing the sources of these gases — e.g. by increasing the share of renewable energies, or establishing a cleaner mobility system — or by enhancing the storage of these gases — e.g. by increasing the size of forests. In short, mitigation is a human intervention that reduces the sources of GHG emissions and/or enhances the sinks”.

Source: European Environment Agency. (n.d.) What is the difference between adaptation and mitigation?

Conditional cash transfers

“Conditional cash transfers or CCT are monetary assistance distributed to individuals or households on the condition that these undertake specified activities, e.g., that children attend school or that mothers attend primary health centres”.

Conditional in-kind transfers

“Conditional in-kind goods distributed to individuals or households on the condition that these undertake specified activities, e.g., that children attend school or that mothers attend primary health centres”.


Conditionalities

“In the context of social welfare, the term conditionality refers to (...) households or individuals who receive government transfers conditional on some form of behavioural compliance. This means that in order to continue receiving support qualifying households have to meet specific conditions that are spelled out by the program. (...) Conditionality is supposed to tackle behavioural barriers that prevent households to improve their situation and escape poverty”.


Consumption and expenditure

“Household expenditure is the “nominal money outlay of the household; Household consumption is the quantity of goods and services that the household enjoys in a given period; and Household consumption expenditure is those money outlays directed toward consumption (e.g., it excludes outlays for investment purposes)”.


Coverage

“The population reached by a programme. Coverage rate measures the extent to which programmes reach their target population”.

COVID-19
“Coronavirus disease (COVID-19) is an infectious disease caused by the SARS-CoV-2 virus”.

Digital social protection
“Digital social protection is when systems of social protection and assistance are driven by digital data and technologies that are used to automate, predict, identify, survey, detect, target. Digital technologies are involved in different aspects of social protection delivery, the main ones being information systems, financial services, and grievance/accountability mechanisms”.
Source: GSDRC. (n.d.) Digital Social Protection.

Disability
“Disability is complex, dynamic, multidimensional, and contested. The transition from an individual, medical perspective to a structural, social perspective has been described as the shift from a “medical model” to a “social model” in which people are viewed as being disabled by society rather than by their bodies. A balanced approach is needed, giving appropriate weight to the different aspects of disability. Disability is the umbrella term for impairments, activity limitations and participation restrictions, referring to the negative aspects of the interaction between an individual (with a health condition) and that individual’s contextual factors (environmental and personal factors)”.

Disability pension
“Under most programs, provisions for disability benefits for persons who are permanently disabled as the result of non-occupational causes are very similar to those for the aged. The same basic formula usually applies for total disability as for old age—a cash amount usually expressed as a percentage of average earnings. Increments and dependents’ supplements are generally identical under the total disability and old-age programs. For persons with total disabilities, a constant-attendance supplement, for instance, 50 percent of the benefit, may be paid to those
who need help on a daily basis. Partial disability benefits, if payable, are usually reduced, based on a fixed scale. The system may also provide rehabilitation and training. Some countries provide higher benefits for workers in arduous or dangerous employment”.


Disaster Risk Management

“DRM activities are all the processes that aim to reduce the likelihood of a disaster, lessen the impact of hazards, and improve people’s ability to cope when a disaster occurs. DRM is defined as, ‘the application of disaster risk reduction policies and strategies to prevent new disaster risk, reduce existing disaster risk and manage residual risk’. It is often viewed as having five focal areas: prevention, mitigation, preparedness, response, and recovery”.


Disaster Risk Reduction

“The concept and practice of reducing disaster risks through systematic efforts to analyse and manage the causal factors of disasters, including through reduced exposure to hazards, lessened vulnerability of people and property, wise management of land and the environment, and improved preparedness for adverse events”.


Early Retirement for Labour Market Reasons

“Policies that incentivize working individuals to retire earlier than would be previously required. This is usually associated with labour interventions that seek to balance distortions related to pension systems and the labour market. An example would be policies that seek to incentivize employees who are close to retirement age to retire earlier to create more job openings for the youth”.

Source: own definition
Education

“According to the United Nations Convention on the Rights of the Child, education is a human right and the “education of the child shall be directed to: (a) The development of the child’s personality, talents and mental and physical abilities to their fullest potential; (b) The development of respect for human rights and fundamental freedoms, and for the principles enshrined in the Charter of the United Nations; (c) The development of respect for the child’s parents, his or her own cultural identity, language and values, for the national values of the country in which the child is living, the country from which he or she may originate, and for civilizations different from his or her own; (d) The preparation of the child for responsible life in a free society, in the spirit of understanding, peace, tolerance, equality of sexes, and friendship among all peoples, ethnic, national and religious groups and persons of indigenous origin; (e) The development of respect for the natural environment”.”


Educational fee waiver

“School fee waiver should enable those who cannot afford to pay for their education to have access to schooling”.


Eligibility criteria

“The set of legally defined conditions which stipulate if, and when a person has the right to claim a benefit”.


Employment / Wage subsidies

“We define wage subsidies (or hiring subsidies, or employment subsidies) as transfers to employers or employees that cover at least part of the eligible individual’s wage or non-wage employment costs. Their main goal is to provide incentives for employers to hire members of the target group”.
Enrolment / registration
“The enrolment process formalises the selection of the eligible beneficiaries, and the
degree of formality this requires varies from programme to programme. Enrolment
can take place at the same time as registration. The registration process is the first
point of official contact between the social transfer programme and the potential
participant. This usually takes the form of either a social worker visit to the home of a
potential beneficiary as part of an expansive survey (survey approach), or else a visit
by a household member to a designated enrolment site or government office (on-
demand approach)”. 

Source: Samson, M., Van Niekerk, I., & Mac Quene, K. 2006. Designing and Implementing
Social Transfer Programmes.

Entrepreneurship/Start-up incentives
“Programmes and interventions that aims to foster entrepreneurship and enable the
poor to start up and grow their own business. In developing countries, this can be
associated to labour market policies that aim to reduce constraint and enhance
productivity among the self-employed and small-scale entrepreneurs”.

Regression Analysis.

Environment
“The totality of all the external conditions affecting the life, development and survival
of an organism”.


Expenditure and financing
“Expenditure is defined as “All nonrepayable and nonrepaying payments by the
government whether requited or unrequited and whether for current or capital
purposes. Expenditure is shown net of recoveries on past expenditure and net of other
adjustments transactions. It is otherwise shown gross with the exception of
departmental enterprises’ transactions, for which sales to the public are offset against corresponding operating expenditures.”. Financing is “the means by which a government provides financial resources to cover a budget deficit or allocates financial resources arising from a budget surplus... It includes all transactions involving government liabilities— or claims on others held by government or purposes of liquidity rather than public policy objectives, and changes in government holdings of cash and deposits.”


Family and child allowance
“Periodical payments to a member of a household with dependent children to help with the costs of raising children”.

Source: EUROSTAT. 2022. Family or child allowance.

Feedback and complaints mechanisms
Also known as “Grievance redress mechanisms (GRMs)”, they “refer to the formal institutions and channels that capture beneficiary complaints or grievances related to targeting, service delivery, or other program functions, and provide redress. Grievance redress is an important element of managing a targeted program, particularly when cash is involved. Grievance redress mechanisms can be important for mitigating inclusion and exclusion errors and for monitoring corruption.”


Financial education and inclusion
“Financial education can be defined as “the process by which financial consumers/investors improve their understanding of financial products, concepts and risks and, through information, instruction and/or objective advice, develop the skills and confidence to become more aware of financial risks and opportunities, to make informed choices, to know where to go for help, and to take other effective actions to improve their financial well-being”. Financial education thus goes beyond the provision of financial information and advice, which should be regulated, as is already often the
case, in particular for the protection of financial clients (i.e. consumers in contractual relationships)“.


“Financial inclusion means that individuals have access to useful and affordable financial products and services that meet their needs (...) delivered in a responsible and sustainable way. (...) Financial access facilitates day-to-day living, and helps families plan for everything from long-term goals to unexpected emergencies. As accountholders, people are more likely to use other financial services, such as (...) invest in education or health, manage risk, and weather financial shocks, which can improve the overall quality of their lives“.


**Food and nutritional security**

A situation that exists when all people, at all times, have physical, social and economic access to sufficient, safe and nutritious food that meets their dietary needs and food preferences for an active and healthy life. Based on this definition, four food security dimensions can be identified: food availability, economic and physical access to food, food utilization and stability over time.

Source: FAO; IFAD and WFP. 2015. Annex 3 - Glossary of selected terms used in the report.

**Food for work**

“Food distributed to individuals or households in exchange for labour“.


**Food subsidies**

“The commonest form of food subsidy is a direct, untargeted subsidy that lowers the price of a staple food for all consumers in a country. (...) Targeted subsidies mean that governments subsidise food prices for certain households, targeted either by income level or by category. In other words, a dual-price policy is adopted: non-targeted
individuals buy food at market prices, while eligible households have access to cheaper food”.


Fuel, water, and electricity subsidies
“A fossil fuel subsidy is any government action that lowers the cost of fossil fuel energy production, raises the price received by energy producers or lowers the price paid by energy consumers. There are a lot of activities under this simple definition—tax breaks and giveaways, but also loans at favourable rates, price controls, purchase requirements (…)”.


“Examples of direct water subsidies are funds which are used to cover part of the water bill of poor households who meet certain clearly defined eligibility criteria. Often, direct subsidies are also given in total sanitation campaigns to support people to build latrines to achieve an open-defecation-free status in a certain area”.


“Energy subsidies comprise both consumer and producer subsidies. Consumer subsidies arise when the prices paid by consumers, including both firms (intermediate consumption) and households (final consumption), are below supply costs, including transport and distribution costs. Producer subsidies arise when prices are above this level. Where an energy product is internationally traded, such as for petroleum products, the supply cost is based on the international price. For a net importer of fuel products, the supply cost is the overall cost of importing the fuel, whereas, for a net exporter, the supply cost represents the forgone revenue, or opportunity cost, from not exporting the product”.


Funeral grants
“(I)n case of death, to cover funeral-related expenses”.

Source:
Gender

“Gender refers to (…) the social attributes and opportunities associated with being male and female and the relationships between women and men and girls and boys, as well as the relations between women and those between men. These attributes, opportunities and relationships are socially constructed and are learned through socialization processes. They are context/ time-specific and changeable”.


Gender-based violence

“Gender-Based violence (GBV) refers to harmful acts directed at an individual based on their gender. (…) GBV can include sexual, physical, mental and economic harm inflicted in public or in private. It also includes threats of violence, coercion, and manipulation. This can take many forms such as intimate partner violence, sexual violence, child marriage, female genital mutilation and so-called ‘honour crimes’. It is rooted in gender inequality, the abuse of power and harmful norms (…) and it is a serious violation of human rights and a life-threatening health and protection issue”.

Source: UNHCR. (n.d.) Gender-based Violence.

Gender-sensitive social protection

“Gender-sensitivity of social protection can be broadly understood as a continuum whereby programs and systems are more gender sensitive for recognizing specific needs and priorities of women and other genders and seek to purposefully and proactively tackle gender inequalities by questioning and challenging the structures, institutions and norms on which these inequalities are based”.

*Due to classification reasons, in this category definition, gender-sensitivity also encompasses other terms such as gender-responsive (programmes that explicitly respond to women’s and other gender’s needs) and gender-transformative (programmes that tackle the root causes of gender inequality and transform harmful gender norms) (Unicef 2020, p. 11).

Sources:

**Global Development Agenda (SDGs / MDGs)**

“The Sustainable Development Goals are a universal call to action to end poverty, protect the planet and improve the lives and prospects of everyone, everywhere. The 17 Goals were adopted by all UN Member States in 2015, as part of the 2030 Agenda for Sustainable Development which set out a 15-year plan to achieve the Goals”.

Source: UN. (n.d.). *The sustainable development agenda*.

“The eight Millennium Development Goals (MDGs) – which range from halving extreme poverty rates to halting the spread of HIV/AIDS and providing universal primary education, all by the target date of 2015 – form a blueprint agreed to by all the world’s countries and all the world’s leading development institutions. They have galvanized unprecedented efforts to meet the needs of the world’s poorest”.


**Governance and coordination**

“Content about strategic and macro policy issues and management, organisational arrangements and administrative operations of social protection policies and programmes”.

Source: own definition

**Health**

“Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity”.


26
Health benefits / reduced medical fee
“Health benefits or reduced medical fee subsides can refer to those programmes that enable people to have access to health care and services free of charge or with discount. These subsidies may also be for mixed health protection schemes such as national health insurances, whereby government revenues are used to subsidise the poor. In addition, government revenues may be used as subsidies for social health insurance, community-based and private health insurance”.
Source: own definition

HIV / AIDS
“Human immunodeficiency virus (HIV) is an infection that attacks the body’s immune system, specifically the white blood cells called CD4 cells. HIV destroys these CD4 cells, weakening a person’s immunity against opportunistic infections, such as tuberculosis and fungal infections, severe bacterial infections and some cancers”.
Source: WHO. (n.d.). HIV/AIDS.

Housing and infrastructure
“Housing is a human right. Moreover, housing must be adequate, which encompasses more than four walls and a roof. Adequate housing must account for security of tenure, availability of services, affordability, habitability, accessibility, location and cultural adequacy. Infrastructure plays a crucial role in society and the economy by providing services to households and industry. For households, the availability of transport, electricity, safe water and sanitation, and other basic facilities has a tremendous impact on improving the quality of life. This is especially the case for poorer households. For industry, infrastructure services facilitate production, transport and trade that all spur economic growth, which in turn helps in reducing poverty”.
Sources:
- UNHABITAT. 2014. The right to adequate housing.
Housing subsidies

“Housing subsidies are mainly divided in two kinds: supply-side and demand-side subsidies. “Traditional supply-side housing programs include government-built public housing and other so-called “bricks and mortar” subsidies given to the producers of housing, including, for example, subsidized financing, contributions of land and materials, and tax credits and deductions.” Demand-side subsidies, on the other hand, consist mainly of “capital grants and allowances targeted to poor households (...) In the housing sector, capital grants are one-time subsidies to households that they can use to purchase, build, or complete (new or existing) units or to rehabilitate existing units (...) A housing allowance is a regular ongoing subsidy to households that offsets some of the costs of their housing and housing-related services. Allowances can be provided to either owners or renters, and they may be used for new or existing housing.”


Human capital

“Human capital consists of the knowledge, skills, and health that people accumulate over their lives. People’s health and education have undeniable intrinsic value, and human capital also enables people to realize their potential as productive members of society. More human capital is associated with higher earnings for people, higher income for countries, and stronger cohesion in societies. It is a central driver of sustainable growth and poverty reduction”.


Human rights

“Human rights are rights inherent to all human beings, regardless of race, sex, nationality, ethnicity, language, religion, or any other status. Human rights include the right to life and liberty, freedom from slavery and torture, freedom of opinion and expression, the right to work and education, and many more. Everyone is entitled to these rights, without discrimination”.

Humanitarian assistance

“The Principles of Good Humanitarian Donorship refer to assistance that is provided to ‘...save lives, alleviate suffering and maintain human dignity during and after man-made crises and disasters caused by natural hazards, disasters, as well as to prevent and strengthen preparedness for the occurrence of such situations.’ Whilst various types of humanitarian assistance exist, the modality with the most similarities to social protection, and particularly social assistance, in terms of design, delivery features and common target group is humanitarian cash and voucher assistance, and, perhaps to a slightly lesser degree, food transfers. Cash and vouchers in particular are increasingly used as a humanitarian response modality with global calls to increase their use”.

Source: SPAN. 2019. Operational Note n°09 Fragility.

Humanitarian–social protection nexus

“Humanitarian aid and social protection have important convergences that allow for linkages between them. Social protection and humanitarian assistance for instance have similar objectives of protecting and preventing risks for vulnerable people, as well as promoting and transforming the ability of vulnerable households to weather future shocks. To achieve these objectives, both approaches employ similar modalities, such as in-kind or cash transfers, or transfers conditional on engagement in public works projects or provision of services. In terms of financing, while social protection programmes can be either contributory or non-contributory, national social assistance programmes and humanitarian assistance are both non-contributory. Since both approaches typically use cash or in-kind transfers (non-contributory) to meet the consumption and basic needs of vulnerable households, the capacities between the two sets of interventions can be shared and links between them can lead to greater effectiveness, cost-efficiency gains and inclusivity”.


In kind transfers

“In kind transfers are non-cash transfers, typically products, such as food baskets, hygiene products, commodities”.
Inclusive growth
“Economic growth that creates opportunity for all segments of the population and distributes the dividends of increased prosperity, both in monetary and non-monetary terms, fairly across society”.


Income inequality
“Income inequality is an indicator of how material resources are distributed across society. Measures of income inequality are based on data on people’s household disposable income. The main indicator of income distribution used is the Gini coefficient”.

Source: OECD. 2011. Equity indicators - 1. Income Inequality.

Informal social protection
“Informal social protection (ISP) is structured by social relations. Care and support is provided to family, community and group members through social structures and social networks”.


Informality
“Refers to all economic activities by workers and economic units that are – in law or in practice – not covered or insufficiently covered by formal arrangements; and does not cover illicit activities”.

Source: ILO. 2015. R204 - Transition from the Informal to the Formal Economy Recommendation, 2015 (No. 204)

Information systems (MIS, Social Registry, Integrated Registry)
“Social information systems incorporate social registries and are software applications that collect, organize, store, process, create and distribute data and information,
including administrative data from various State-managed sources and information self-reported by individuals, turning it into a more extensive tool with the potential to follow up, monitor and evaluate social protection policies, enabling individuals and their households to be linked with social protection entitlements. Social registries of recipients collect and store data on individuals and households that could potentially be users of the different entitlements provided by social protection systems, including variables that can be used to characterize the households socioeconomically and thereby determine their eligibility for one or more social entitlements”.


Job training

“Job training programmes are one of the most common types of Active labour market topics and usually aims to increase human capital, provide skills, and improve employability. This can be targeted at employed individual to upgrade their current skills (on-the-job) or at unemployed individuals (off-the-job) to enhance their chances of finding a job. Technical and Vocational Education and Training (TVET) are also a common type of job training but targeted at the youth and those in working age entering the market for the first time”.

Sources: IPC, GIZ, socialprotection.org, 2020. Social Protection Programmes (micro-course)

Labour market / employment

“The labour market is the real or virtual meeting point, within an economy or marketplace, where people selling their labour (employees) negotiate and may reach an agreement with those who buy it (employers). Labour markets provide the structure through which workers and employers interact about jobs, working conditions and pay. Other actors are the institutions and processes of collective bargaining, including the roles played by employers’ organisations and trade unions”.


“The employment level is defined as the number people engaged in productive activities in an economy. The concept includes both employees and the self-employed. The two main measures used for employment are the number of persons employed or the number of employees”.
Labour market services

“Labour market services - also called public employment services (PES) - aim to match the unemployed with available jobs, by providing a range of services, such as career advice and counselling, job search assistance, job clubs and networking. These services can be provided by public agencies or in partnership with private actors. This can be linked to other active labour market policies, such as job training and public employment”.

Sources: IPC, GIZ, socialprotection.org. 2020. Social Protection Programmes (micro-course)

Laws and Policies

Content about preparation and enactment of laws by a legislative body through its law-making process.

Source: Own definition

Maternal health

“Maternal health refers to the health of women during pregnancy, childbirth and the postnatal period. Each stage should be a positive experience, ensuring women and their babies reach their full potential for health and well-being”.


Maternity / Paternity / Parental benefits

“Maternity benefit “ensures income security for pregnant women and mothers of newborn children and their families, and also effective access to quality maternal and child health care. It also promotes equality in employment and occupation”.


“Paternity leave is generally a short period of leave for the father immediately following childbirth. Its aim is to enable fathers to assist the mother to recover from childbirth, which is also crucial in establishing breastfeeding, take care of the newborn as well as other children, attend to the registration of the birth and other family-related responsibilities. Paternity leave is either provided as a separate leave measure
for fathers or included in the “special leave” provisions to which all employees are entitled. In that case, the birth of a child or “family events” are listed among the grounds for taking a specific number of days off, in addition to annual leave”.


“While maternity leave aims to protect working women during their pregnancy and recovery from childbirth, parental leave refers to a relatively long-term leave available to either or both parents, allowing them to take care of an infant or young child over a period of time, usually following the maternity or paternity leave period”.


**Microfinance**

“Microfinance can be defined as attempts to provide financial services to households and micro-enterprises that are excluded from traditional commercial banking services. Typically, these are low-income, self-employed or informally employed individuals, with no formalized ownership titles on their assets and with limited formal identification papers”.


**Migration**

“The movement of persons away from their place of usual residence, either across an international border or within a State”.

Source: IOM. (n.d.). Key Migraton Terms.

**Monitoring and evaluation systems**

“(…) monitoring and evaluation instruments serve different functions. On the one hand, monitoring tools allow an assessment of the extent to which an intervention has been evolving (tracking performance on expected results) and involve routine collection of administrative and programme-specific data on how many beneficiaries are reached and covered, how effectively the intervention is reaching them, etc. Monitoring should be a continuous process, integrated as an essential component of any programme
design. Evaluation, on the other hand, entails assessing specific areas of a programme’s implementation and operation (process evaluations) as well as assessing the impacts of interventions on outcomes (impact evaluations). Evaluations are usually carried out by independent evaluators seeking an objective assessment of what changes in outcomes (and by how much) can be attributed to the programme and/or intervention”.


Nutritional programmes
“Nutritional programmes are interventions developed to address nutrition in its distinct perceptions, especially regarding (i) the improvement and study of causes and impacts of wasting, undernutrition, micronutrient deficiencies, obesity, etc; and (ii) the potential to improve the food and nutrition security of programmes beneficiaries”.


Old-age pension
“Old age benefits are paid to workers when they reach the statutory retirement age or have reached required contribution time to the system. The statutory retirement age varies across countries, and many have different retirement age limits for men and women to compensate women for certain structural disparities, such as unpaid reproductive and care work, and unfavourable conditions in the labour market, which impact women mostly”.


Outreach / communications and awareness
“Involves interactions to inform people about social protection programs and delivery processes and to create adaptations to encourage them to engage”.

Passive labour market policies

“Passive labour market policies - are schemes that provide income replacement in periods of unemployment to alleviate the financial needs of the unemployed, mainly unemployment benefits and income support”.


Political economy

“Content about linkages between politics and economics, drawing on theories of economics, law as well as political and social sciences that shows how these institutions can shape national policies and social protection outcomes”.


Poverty reduction

“Poverty reduction has become a central goal for development. It can be achieved by economic growth and/or by the distribution of income. Issues related to the benefits of growth accrued to the poor have become a priority of development policy in the 1990s. An emerging consensus is that growth alone is a rather blunt tool for poverty reduction. In conjunction with emphasis on poverty reduction, policies as to the redistribution of income and assets have become increasingly more important“.


Price subsidies

“Price subsidies are used to keep prices low for certain goods and services. Examples include food subsidies; utility and electricity subsidies and allowances; housing subsidies and allowances; agricultural inputs subsidies; health insurance exemptions, reduced medical fees; education fee waivers; and transportation benefits“.

Source: GSDRC. (n.d.). Types of social protection.

Productive/Economic inclusion (programmes)

“Productive inclusion actions focus on families living in either urban or rural areas. The design and implementation of public policies are therefore tailored to address these two different environments. In urban areas, measures for inserting workers in the
world of work involve boosting entrepreneurship and encouraging people to seek formal employment and/or occupations based on self-managing cooperatives or groups. Official incentives include offering vocational training courses and opportunities for worker/market mediation”.


Programme graduation
“Graduation from social protection refers to leaving a social protection programme after reaching a desired level of well-being, and once the participant has acquired an expected set of resources (e.g., skills, education, nutrition)”.


Public health insurance
“Public Health insurance is one mechanism to finance and manage health care and services as to provide access to health goods for individuals and families. Most health insurance systems are two-tiered and consist of a contributory regime (employment-based coverage) and subsidised regime (coverage to informal and self-employed persons and the poor). In addition, most countries in the world also have private health insurance systems”.


Public procurement from self-employed, microentrepreneurs and smallholder farmers
“Public procurement is the process of purchasing goods, services or works by the public sector from the private sector. The range of economic sectors concerned by public procurement is as wide as the needs of a government to properly function and deliver services to its citizens”.

Public works programmes

“Public works provide income transfers to the poor through employment in public labour-intensive public development projects to build infrastructure (e.g., roads, schools), particularly during ‘slack’ or ‘hunger’ periods”.

Source: Holmes, R and Jones, N. 2011. Public works programmes in developing countries: Reducing gendered disparities in economic opportunities?

Remittances

“Personal monetary transfers, cross border or within the same country, made by migrants to individuals or communities with whom the migrant has links”.


Resilience

“Resilience is the ability of individuals, households, communities, cities, institutions, systems and societies to prevent, resist, absorb, adapt, respond and recover positively, efficiently and effectively when faced with a wide range of risks, while maintaining an acceptable level of functioning without compromising long-term prospects for sustainable development, peace and security, human rights and well-being for all”.


School feeding programmes

“Regular meals provided to school age children to contribute to poverty reduction and food security”.


Service subsidies

“Service subsidies are used to keep prices low for certain services. Examples include: health insurance exemptions, reduced medical fees; education fee waivers; and transportation benefits”.

Source: GSDRC. (n.d.). Types of social protection.
**Shock-responsive social protection**

“Shock-responsive social protection “focuses on shocks that affect a large proportion of the population simultaneously (covariate shocks). It encompasses the adaptation of routine social protection programmes and systems to cope with changes in context and demand following largescale shocks”.


**Situation analysis / needs assessment**

"Situation analysis involves an evaluation of the current status of the issues pertaining to health and environment and the way they are being addressed. the situation analysis should also therefore describe the policy framework within which decision making takes place, the institutional arrangements that support the planning and implementation of health and environment programmes, the management procedures governing operations and the resource base which supports these operations. The situation analysis and needs assessment (SANA) places the ecosystems on which livelihood depends at the centre of the exercise and addresses the full array of environmental health determinants, the drivers that determine their associated risk levels and the management of these risks."


**Social care services**

“Social care services refer to non-cash interventions for families, women, children, immigrants, the sick and the elderly, such as: Institutional care, psychosocial support, child protection and family services, sexual and gender-based violence support, early intervention and rehabilitation services for persons with disabilities, personal care services for older people, among other services”.

Social pensions
“Social pensions are direct and regular cash transfers to elderly or disabled people, who either have not participated in the formal labour market or did not meet the required social insurance contributions during their working life. Contrary to contributory pension schemes, social pensions do not require a minimum level of contribution from either the beneficiaries or their employer”.


Social protection definitions and features
Content that provides an overview about: what is social protection (SP), what are the main components of SP, the history of SP; and the different approaches to SP.

Source: own definition

Social Protection Floors
Social Protection Floors “is an approach that promotes an integrated set of social policies designed to guarantee income security and access to essential social services for all, paying particular attention to vulnerable groups and protecting and empowering people across the life cycle.”


Social protection systems
“Social protection systems are defined differently by different agencies. The World Bank strategy refers to them as “portfolios of coherent programmes that can talk to each other, often share common administrative sub-systems, and work together to deliver resilience, equity and opportunity.” UNICEF defines integration as “a network of responses, that take a multi-pronged and coordinated approach to the multiple and compounding vulnerabilities faced by children and their families.”

**Social transfers**

“Social transfers can take a variety of forms and would normally be provided by the state to those citizens regarded as living in conditions of long-term extreme poverty or vulnerability (...) Social transfers can be provided as cash, in-kind (often as food) or as vouchers”.


**South-South cooperation**

“South-South cooperation is a broad framework of collaboration among countries of the South in the political, economic, social, cultural, environmental and technical domains. Involving two or more developing countries, it can take place on a bilateral, regional, intraregional or interregional basis. Developing countries share knowledge, skills, expertise and resources to meet their development goals through concerted efforts”.

Source: UNOSSC. (n.d.). About South-South Triangular Cooperation.

**Subsidies**

“Government subsidies are sometimes classified as social protection if they enhance access to basic goods or services for the poor or function as safety nets. Subsidies can keep prices low for basic goods and services consumed by the poor”.


**Survivors pension**

“Survivors’ pensions are usually paid to the dependents (widows/widowers with children, or dependent children or parents) of insured workers or pensioners who have passed away. This benefit is generally a percentage of either the benefit paid to the deceased at death or the benefit to which the insured would have been entitled if he or she had attained pensionable age or become disabled. Survivor pensions are usually paid to some category of widows. The amount of the benefit can be a range of the deceased worker benefit or, in some cases, the totality of the benefit”.

Sustainable livelihoods
“A livelihood comprises the capabilities, assets (including both material and social resources) and activities required for a means of living. A livelihood is sustainable when it can cope with and recover from the stresses and shocks and maintain or enhance its capabilities and assets both now and in the future without undermining the natural resource base”.

Targeting
“Targeting can be defined as any mechanism for identifying eligible individuals and screening out the ineligible from a population, for purposes of transferring resources such as social grants or preferential access to social services”.

Tax credits / exemptions
“This is social protection provided in the form of tax breaks. Tax breaks can take the form of a tax allowance, an exemption from paying a certain amount of income tax; deduction, can reduce the amount of income before people calculate the tax they owe; tax credit, can reduce the amount of tax people owe or increase tax refund, and some credits may give a refund even if people don’t owe any tax”.

Transport subsidies
“All transport costs that are not covered by users, including all kinds of externalities, infrastructure costs or different regulation”.

Unconditional cash transfers
“Unconditional cash transfers are monetary assistance transferred to individuals and/or households without any conditions or requirements”.


Unconditional in-kind transfers
“Unconditional in-kind goods transferred to individuals and/or households without any conditions or requirements”.

Unemployment
“The unemployment rate is the ratio of people not working, actively seeking and available to take a job to the population of working age either in work or unemployed (aged 15 to 64). The data are gathered through labour force surveys of member countries. According to the standardised ILO definition used in these surveys, the unemployed are those who did not work for at least one hour in the reference week of the survey, but who are currently available for work and who have taken specific steps to seek employment in the four weeks including the survey reference week.”

Unemployment assistance (non-contributory)
“Payments of unemployment assistance benefits are intended to eliminate or reduce poverty among lowincome families where unemployment occurs. (...) unemployment assistance is paid to only to families with unemployment whose income and assets fall below the thresholds specified by a means test.”

Unemployment benefits
Contributory and/or non-contributory cash transfers targeting unemployed people.
Source: Own definition.
**Unemployment insurance (contributory)**

“Payments of unemployment insurance (UI) benefits are intended to smooth income by replacing a portion of an eligible worker's lost wages attributable to unemployment”.


**Universal Basic Income**

“Universal Basic Income (UBI) is a periodic and unconditional cash payment delivered to all individuals, without means-test. Which means this basic income assistance is: regularly paid; paid in cash; delivered in an individual basis; and payment is not conditional to any requirement to work or to demonstrate willingness-to-work”.

Source: Basic Income Earth Network. (n.d.) *About basic income*.

**Universal Social Protection**

“Content about the integrated set of policies designed to ensure income security and support to all—paying particular attention to the poor and the vulnerable”.


**Unpaid care work**

“Unpaid care work refers to all unpaid services provided within a household for its members, including care of persons, housework, and voluntary community work. These activities are considered work, because theoretically one could pay a third person to perform them”.


**Voucher**

“Vouchers provide access to pre-defined commodities or services and can be exchanged in designated shops or in fairs and markets. They may be denominated either in monetary value, commodity or service value, which can also be combined."
Commodity vouchers have been used to provide access to food, Non-Food Items (NFIs), seeds and livestock, for example”*

* If the benefit is not tied to a set of predefined commodities or services, then they will be treated as cash transfer


**Wage inequality**

“More men work than women in most countries, and they get paid more for similar work. Higher gaps in labour force participation rates between men and women result in inequality of earnings between sexes, thus creating income inequality. Gender inequality is strongly associated with income inequality over time and across countries of all income groups”.

Source: IMF. (n.d.). Gender and Income Inequality.

**Water, sanitation, and hygiene**

“Safe drinking-water, sanitation and hygiene are crucial to human health and well-being. Safe WASH is not only a prerequisite to health, but contributes to livelihoods, school attendance and dignity and helps to create resilient communities living in healthy environments”.


**Women’s empowerment**

“In the field of development economics women’s empowerment is defined as the process through which women acquire the ability to make strategic life choices in a context where this ability was previously denied to them. The author stresses that the ability to exercise individual choice is based on three interrelated elements – resources, agency, and achievements. Resources refer to material, human, and social expectations and allocations. Agency is the ability or sense of ability to define one’s goals, act upon them, and decide on their own strategic life outcomes. Achievements include a variety of outcomes ranging from improved well-being to achieving equal representation of women in politics.”
Work injury benefits

“Work injury schemes provide for compensation for work-related injuries and occupational diseases”.
