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Between Protection and Activation: People with Disabilities in the Social Investment State¹

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Abstract

Federal and provincial employment and income policies in the field of disability within the evolution of Québec’s welfare state are reviewed from the analytical perspective of the social investment state. The use of the social investment state concept allows the authors to reflect on the paradoxes associated with the demands of the disability movement and the responses of the state. The authors demonstrate that the logic of social investment and activation of the workforce yielded gains consistent with the disability movement’s claims, allowing people with disabilities to use their potential and find fulfillment in the labor market while often improving their financial conditions. However, it is argued that the social investment perspective offers a less suitable response for those permanently excluded from the labor market, especially Social Solidarity Program recipients who benefit only from meager financial protection. While early impact analyses of measures designed to equalize opportunities and activate the workforce do not really show the expected results, the latest statistics available for people with disabilities reflect moderate, but tangible results in terms of reducing the number of members of a household living beneath the low-income cut-off and increasing the employment rate for persons with disabilities.

Keywords

Social investment state; Employment and Income policies; Activation of the Workforce; Disability Movement; Québec’s welfare state.

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Introduction

In 2011, the National Council of Welfare published a report on the social costs of poverty and advocated the “investment” approach as a means to curb rising costs by building capacity, removing barriers and creating opportunities for all Canadian citizens (Conseil national du bien-être social, 2011). Redefining the role of the welfare state, the appeal of the term “social investment state” has grown in Canada since the 1990s, despite some criticism (Dufour, Dobrowolsky, Jenson, Saint-Martin, & White, 2007). Promoting active and future-oriented policies and spending, the perspective of social investment suggests measures to promote equal opportunities (Palier, 2005).

Like the proponents of this approach, the disability movement also advocates systemic changes favouring equal opportunities, through a more universal access to services and collective structures. In Québec specifically the disability movement is composed of people (e.g., community groups, coalitions, parents’ associations) with a wide variety of disabilities, so it is only natural to find a set of dynamics and structural tensions that waver between identity particularism and societal universalism (Boucher, 2005). Thus, the movement calls for both full and independent participation in the spheres of public and private lives and, simultaneously,

adequate protection in terms of particular characteristics (Dumais, 2012a). These demands, as legitimate as they are paradoxical, generate a tension that can be difficult to reconcile through federal and Québec social policies. In this context, this article seeks to examine and propose avenues for reflecting on how the state, through social policies, can address these tensions.

Through this article, we will 1) establish the theoretical perspective of social investment, which will be used as an analytical framework for our reflection; 2) offer an overview of how people with disabilities and some income and employment policies that affect them are part of the current evolution of the welfare state; 3) present a reflection on income security and employment policies through a social investment perspective as an approach to reconcile the demands of the disability movement in Québec. To carry out this task, we build on our previous research pertaining to the disability field. Indeed, our work on services and support provisions (social inclusion and employment, home support and adaptation, access to public transportation) has allowed us to reflect on some of the issues associated with the transformation of the welfare state in Québec with regard to income and employment policies. (Archambault, Dumais, & Vaillancourt, 2011; 2013; Vaillancourt, Caillouette, & Dumais, 2002). During the last decade, we highlighted the transformation of welfarism, in terms of both provision of community-based social services and political governance by documenting the increasing importance of the third sector in the field of disability — through public policies — and the political weight that human rights associations have managed to acquire in implementing inclusion in programs, policies, and public discourse. The social investment perspective supports the idea of a transformation, rather than of a decline of the state, giving it a less tutelary role to play in all public services — as it was the case at the peak of the welfare state — and more of a regulatory and partnership role with the third sector (Jetté, 2008; Vaillancourt, 2011).

The Social Investment State

Globalization, changes in the family core and gender relations, as well as a period of slow economic growth have changed the context in which Keynesian welfare states appeared and grew (Myles & Quadagno, 2002). While several expressions have been used to denote the changes in the Keynesian welfare states since the early 1990s, we suggest using the concept of social investment state to guide an analysis of the tensions bearing on social policies regarding disability, income and work.

The Equalization of Opportunities toward Activation and Participation

According to Palier (2005), the principles of social policies must “allow for the combination of economic efficiency and social justice” (p. 119) [our translation]². Indeed, the social investment perspective presents itself as means to accomplish this task in the social sector. It is in this context that the Government of Canada distanced itself, in the mid-1990s, from its previous neoliberal orientations to initiate a reform process with a social investment perspective in which social protection should be considered as an investment, re-establishing the legitimacy of state intervention (Dufour et al., 2007). Drawing on the work of Esping-Andersen (2002), Gallie, Hemerijck and Myles in *Why We Need a New Welfare State*, Palier (2005) emphasizes that social investment acts less on the equalization of living conditions than on the equalization of opportunities throughout one’s life in a “move from a strategy of remedial and compensatory social policies to a preventive strategy” (p. 125) [our translation].³ Thus, security does not come from social protection offered by the state only in case of need, but from the personal ability of

² « [...] permettre de combiner efficacité économique et justice sociale. »

³ « [...] de passer d’une stratégie de politiques sociales réparatrices et compensatrices à une stratégie préventive. »

each individual to adapt and navigate through a knowledge-based economy, in an entrepreneurial culture (Jenson & Saint-Martin, 2003). From the social investment perspective, the welfare state allocates large budgets to child care, parental leave, and equal opportunities related to education and health (Cantillon & Van Lancker, 2011). The challenge is thus, according to Palier (2005), to promote employment through incentives to work.

Reforms oriented toward an activation approach to social protection promised to reduce poverty and to integrate people using employment within a more inclusive labour market (Barbier, 2009). In Québec, the measures (federal and provincial) for the activation of people excluded from the labour market have been, in some cases, active incentives (such as employment subsidies, programs to develop professional skills, childcare subsidies, and tax breaks), and in other cases, a more “punitive” approach (such as establishing a very low threshold for last-resort financial assistance, restricted criteria, and penalties) (Lefèvre, Boismenu, & Dufour, 2011). Social investment involves activation of the entire working-age population, including those traditionally excluded from the labour market, such as people with disabilities. “Passive” protection is replaced by an objective involving integration and participation.

Limitations of the social investment approach

Theoretically, the prospect of social investment seems appropriate to address contemporary challenges of social protection in a context of low economic growth. However, we should not forget to point out some limitations to this approach. Reforms for an activation approach to

social protection have certainly strengthened the connection between the right to protection and employment activity and the notion of individual responsibility (Barbier, 2009; Méda, 2009). However, for people excluded from the labour market, this logic can create guilt and stigma (Lefèvre et al., 2011). As we will try to show through this article, in the field of disability, the prospect of social investment is subject to certain circumstances in which activation is not necessarily possible. For people whose inborn disabilities have been a major obstacle to professional integration, the weak protection offered by social assistance raises the question of balancing incentives to employment through a last-resort financial assistance that is not very generous, and through adequate protection for those for whose equal opportunities cannot depend on employment. Let us recall that during the post-war boom, the economic and social context allowed the Keynesian approach to combine the principles of redistribution and economic growth. However, contemporary circumstances lead to what some have dubbed the “trilemma” (Iversen & Wren, 1998; Pierson, 2001) according to which governments cannot aspire simultaneously to balance budgets and create jobs while mitigating inequalities; only two of these goals can be pursued at the same time. In this regard, Cantillon and Van Lancker (2011) observe that welfare states have succeeded in creating more jobs in the 2000s, but failed to reduce public spending and income inequality. According to these authors, the investments allocated to activation have first benefited people who were already closest to the labour market. Thus, “in several countries, the increase in employment was not accompanied by a proportional decrease in the number of households in which no one worked” (Cantillon & Van Lancker, 2011, p. 68) [our translation]⁴.

⁴ « [...] dans la plupart des pays, la montée de l’emploi ne s’est pas accompagnée d’une baisse proportionnelle du nombre de ménages dans lesquels aucun membre ne travaille. »

In Québec and Canada, social assistance and employment insurance plans are prime examples of the limitations of the activation concept inherent in the social investment approach (Dufour et al., 2007). According to Campeau (2001), for example, the activation of the Canadian Employment Insurance Program in the 1990s was carried out at the expense of those whose position in the labour market was precarious. His analysis highlights that, on the one hand, active measures of to develop employability are not necessarily adapted to the needs and abilities of all people. Furthermore, it appears that the funds formerly used to protect precarious workers are diverted towards active measures from which they do not necessarily benefit. Regarding Québec’s Social Assistance Program, Lefèvre et al. (2011), reviewed the government’s anti-poverty actions to paint a nuanced portrait of their impact. Indeed, if the number of poor households has declined thanks to more generous allowances (namely to families), budgets supporting welfare recipient activation appear to be reduced and insufficient to meet needs. The problem of the “working poor” hence remains in the background.⁵ In the end, Barbier (2009) as well as Cantillon and Van Lancker (2011), agree that the achievements in terms of poverty reduction in countries that have implemented active social protection measures are not as important as forecasted. Moreover, such assessments were made at the beginning of the 2008 financial crisis: since that time in Europe, national social crises have emerged and amplified poverty and inequality. According to Barbier, the reforms have been more consistent in Beveridge-type social security systems and countries, without however generating impressive results; whereas countries where the most punitive reforms have been implemented have

⁵ Let us recall the outcry of 2013 following the federal government’s reform of the employment insurance measures aiming to force frequent claimants to accept jobs at 70% of their former salary, and that of Québec’s Minister of Social Solidarity and Employment pertaining to income security recipients older than 55.

experienced an increase in inequality. Despite activation, a significant part of the population is out of work and is still precariously supported (Barbier, 2009).

The Fight against Inequality and Poverty: Finding Balance

According to Palier (2005) and Méda (2009), the challenge calls for a shift towards work without neglecting social justice. This proposal could generate the same ambiguity that can be observed in the disability movement: how can we, in a context of low economic growth, find balance between the equalization of opportunities and the equalization of living situations, between activation and protection, in a fight-against-poverty perspective? With regards to this ambiguity, since the 2008 financial crisis we can only observe a growing tension between the increasingly strong demands from associations of people and civil society in general, under the principles of dignity and equality (Prince, 2012; Rosanvallon, 2011) and the resistance of governments to intervene as they are caught in their fight against deficits and the search for new revenues. Indeed, the new social movements in the western world have made the fight against inequality as important as the one against poverty. Based on indignation towards the wealth gap, new discourses of solidarity are building, in which social rights and rights to employment, education, housing, and equal opportunities are asserted more strongly (Dumais, 2012a). Among these new social movements, associations of people with disabilities are parties to this trend.

People with Disabilities in the Shifting Welfare State Framework

To better understand the specific situation of people with disabilities through the development of social policies associated with the welfare state, it seems appropriate, firstly, to draw some broad outlines of the history of the disability movement in Québec and Canada since

the post-war period. Secondly, we will discuss the main programs and measures concerning income and employment for people with disabilities and their impact. Finally, it is pertinent to examine how the Québec *Act to Combat Poverty and Social Exclusion 2002 (Act 112)* fits in the perspective of social investment, as well as its implications for people with disabilities.

From a Keynesian Welfare State to the Activation of Social Policies: The Social Disability Movement

In Canada, the first associations of people with disabilities were founded through the initiative of veterans during the post-war period (Boucher, 2005) in a growing Keynesian welfare state. The National Institute for the Blind, the Canadian Paraplegic Association, the Canadian Association for Community Living, the Canadian Mental Health Association, the Canadian Council on Rehabilitation and Work, the Canadian Hearing Society, as well as others, have influenced the development of the social policies created during this era (Boucher, 2002; Rioux & Prince, 2002).

In Québec, before the Quiet Revolution, social programs for people with disabilities (allowances for the disabled and vocational rehabilitation) were mainly the result of federal initiatives. In the 1960s, Québec's welfare state aimed at the social integration of people with disabilities (Boucher, 2002). From this Keynesian welfare period in Québec's history emerged movements of deinstitutionalization, integration, and normalization of people with disabilities. It was also during this period that self-managed associations of people with disabilities appeared, oriented toward advocacy of rights, and thereby contributing to the establishment of Québec's social system regulation model in which citizens actively participate in the identification and recognition of their needs. The movement formed by organizations and associations was characterized by a new philosophy oriented towards giving the person with disabilities control

when it comes to decisions and services that affect her or him. During the 1970s, associations emphasized the need for measures enabling people with disabilities to participate fully in the development of Québec society and opposed, in the same vein, the bill for the protection of people with disabilities because of its more paternalistic than emancipatory nature (Boucher, Fougeyrollas, & Gaucher, 2003).

In the 1980s, Québec’s adoption of the overall policy *À part... égale* helped to shed light on the social model of disability and the barriers faced by people with disabilities (Boucher, Fougeyrollas, & Gaucher, 2003). In addition, the 1980s also marked the crisis of Keynesian welfare. However, while some during the following decades associations considered employment a key factor for integration (Boucher, 2002; Prince, 2009), others suggested that the activation of workforces closer to employment was made at the expense of the “offside” people (Lefèvre et al., 2011) who would always be excluded from the labour market (Campeau, 2001; Cantillon & Van Lancker, 2011). Finally, in the 2000s, a new perspective gained momentum in the wake of leading writings on capabilities, those of Sen and Nussbaum in particular, and on the development conditions in developing countries (Nussbaum, 2000; Sen, 1993). This human development model argues that equality of living situations can be achieved only if the conditions in which people live offer them the means to ensure recognition and to develop their potential. Applied to the field of disability studies, we believe that this model reinforces the social model, as it emphasizes the extra effort of society to help the poor and dominated populations, and as it tends towards the reinforcement of the social investment perspective. With respect to intellectual disabilities, for example, this model is strongly present in the rights advocacy and rehabilitation discourse (Association Internationale de Recherche scientifique en faveur des personnes handicapées mentales, 2012).

People with Disabilities: Main Income and Employment Programs and Measures

In Québec in 2006, 12% of people without disabilities were members of a household living below the low-income cut-off. This percentage jumps to 32% for people with disabilities (Institut de la statistique du Québec, 2010, p. 102)⁶, who are twice as likely to be unemployed than people without disabilities (Office des personnes handicapées du Québec [OPHQ], 2009). Those who are not part of the labour market have access to one or more sources of federal, provincial, or private income transfers. Table 1 lists the main income support programs for people with disabilities.

Table 1: Income Support Programs and Their Associated Features (2013)

Programs		Features			
		Jurisdiction	Amount for an adult	Wage allowed	Other services or benefits
Last resort financial assistance	Social security (severe employment limitations)	Provincial	\$604 per month	\$200 per month	Claim slip: covers some drugs, and some dental and optometric services
	Social solidarity	Provincial	\$918 per month	\$100 per month	
Quebec Pension Plan (QPP)		Provincial	According to contributions	\$1,000 month or more, according to the case	---

⁶ These statistics show that the rate of poverty is three times higher among people with disabilities than among people without disabilities in Québec. However, according to Aubry (2012), when it comes to interprovincial comparisons, we should use the low-income cut-off with caution because it would overestimate the proportion of poor people in Québec amongst other things.

Dumais & Archambault, “Between Protection and Activation”
CJDS 4.2 (May 2015)

Employment Insurance (EI)	Federal	55% of average insured earnings for 15 weeks (max: \$501 per week)	The earnings will be deducted from the amount of the benefit	---
Private insurance	Private	According to contract	According to contract	According to contract
Québec Occupational Health and Safety Board (CSST)	Provincial	90% of income (max: \$67,500 per year) and/or other allowances according to the case	According to the case	Medical assistance costs (care, treatments, drugs, prostheses, technical support, etc.) Expenses for medical care Vocational rehabilitation
Auto Insurance Board of Québec (SAAQ)	Provincial	90% of income (max: \$67,500 per year) and/or other allowances according to the case	According to the case	Child care costs, home-care service, care, drugs, prostheses, home adaptation, equipment, vocational rehabilitation, etc.
Disability benefits through Veterans Affairs Canada (VAC)	Federal	Depending on the disability severity and the affiliation to the service	According to the case	Medical expenses, rehabilitation, vocational rehabilitation, etc.

Sources: <http://www.mess.gouv.qc.ca/>

<http://www.rrq.gouv.qc.ca/en/invalidite/Pages/invalidite.aspx>

<http://www.servicecanada.gc.ca/eng/ei/types/sickness.shtml#much>

http://www.csst.qc.ca/travailleurs/Pages/acces_travailleurs.aspx

<http://www.saaq.gouv.qc.ca/index.php>

<http://www.veterans.gc.ca/eng/services/disability-benefits>

Table 1 highlights the significant variation between the various programs whether in terms of financial benefits, services, or materials provided. Insurance programs (most often associated with worker status) are generally more generous. Contributory programs offer coverage proportional to lost revenues and to contributions paid by the contributor. As for the last-resort financial assistance program, it is based on solidarity and is granted on the basis of a “means test”. Thus, resources, needs, and potential employability of the individual will be evaluated through a process that could be described as stigmatizing. The last-resort financial assistance program is often the only one which people with inborn disabilities who are unable or unwilling to integrate the labour market can claim. This program offers benefits falling below Québec’s market basket measure.

Our research activities in the field of disability have allowed us to meet people living with disabilities, organizations offering services, and associations working in the field of advocacy. These privileged contacts allowed us to observe, on the one hand, that a great number of people with disabilities seek access to work and a satisfying occupation. They are supported for this purpose by non-profit associations advocating social inclusion. On the other hand, association leaders and spokespersons are equally aware of the high rate of poverty among people with disabilities, and of the weak protection offered to those who cannot rely on the labour market to secure income and support that meet their needs.

Our recent work allowed us to draw certain conclusions with regard to employment and income for people with disabilities. Firstly, we would emphasize that interviews with key informants working in organizations providing employability services have allowed us to observe some interesting results related to the employability of people with disabilities. Data

from the annual reports of three such specialized services based in Montréal show a rate of job placement reaching approximately 50% for the 2008–2009 years (Archambault et al., 2011). In addition, our data lead us to believe that some provincial policies and programs (such as the Programme de subvention aux entreprises adaptées⁷, the Contrat d’intégration au travail,⁸ and the Programme d’aide et d’accompagnement social)⁹ have particularly positive results with the workforce integration of people with disabilities. However, some disincentives to employment were also identified, such as the loss of the claim slip¹⁰ for former recipients whose income exceeds \$1,500 per month, as well as the wage limit set at \$100 per month for recipients of Social Solidarity Program (social assistance) (Archambault et al., 2011). Indeed, this program does not allow people with severe employment limitations to use their employment potential to significantly improve their financial situation. In fact, it may be beneficial for them to abandon last-resort financial assistance in favour of a full-time job; but a part-time job, especially when paid at minimum wage, is not always worth the effort (Archambault et al., 2011). Yet, some people with activity limitations can only work part-time or on an intermittent basis (Congrès du travail du Canada, 2008).

In short, we should keep in mind that, on the one hand, employment is an important vehicle for social participation of people with disabilities, and it can help to reduce the poverty they experience (OPHQ, 2007). On the other hand, on the basis of our empirical studies, we retain that some people will never be able to fit permanently in the labour market as we know it

⁷ Adapted businesses hire at least 60% of people with disabilities and provide them with useful and paid work.

⁸ Job integration contract provides grants organized in eight parts: salary support, accessibility of workplaces, workstation adaptation, capacity assessment, interpreting, wage compensation for medical treatment, supportive care and attention, and special consideration.

⁹ The social assistance and support program provides activities to bring people excluded from the labour market to reach their full potential.

¹⁰ The claim slip usually provides some prescription drugs for free, and certain services such as eye exams and dental care.

(Archambault et al., 2011). In this context, people with disabilities and their associations do not advocate only for access to employment, but also access to justified protection based on their limitations. Some groups would like to see a policy with more generous basic income for people with severe disabilities, like the one proposed by the Caledon Institute in 2010 (Mendelson, Battle, Torjman, & Lightman, 2010). However, in contrast, others fear that this kind of program would help reinforce the “unfit to work” labels applied to people living with disabilities.

In the context of theories related to the social investment state that suggest it is impossible to aspire simultaneously to balance the budget and create jobs while limiting inequality, can we consider the reconciliation, in the field of disability, of generous protective measures tailored to specific needs *and* workforce activation measures?

Québec Act to Combat Poverty and Social Exclusion

A report by the National Council of Welfare of Canada (2011) reminds us of the importance of eradicating poverty. The investment concept is a way to equalize opportunities for the future, but also an equalizing strategy for present living conditions in order to reduce the social and health costs of poverty, as argued by researchers such as Wilkinson and Pickett (2010). The Council's report states that the costs of medical and judiciary services, for example, could be reduced through the eradication of poverty. Yet Québec has had legislation (*Act 112*) to combat poverty and social exclusion for the past 10 years. However, as we mentioned previously, the persistent poverty of people with disabilities remains a concern. Let us examine this fact in a little more detail.

Between 2004 and 2010, \$4.5 billion has been invested to combat poverty in Québec. Between 2010 and 2015, an additional \$7 billion will be injected into various programs and

measures to fight poverty. Data reported by Statistics Canada between 2000 and 2008 and analyzed by Aubry (2012) show, in general, a gradual decrease in the rate of poverty, particularly regarding families. Among people with disabilities, data from the *Participation and Activity Limitation Survey* allow us to observe a decrease in poverty between 2001 and 2006, although the low-income rate remains very high within this population (Aubry, 2012). Yet, the first government action plan to combat poverty and social exclusion (Ministère de l’emploi et de la Solidarité sociale, 2004) was based on two key principles: “employment is the primary option to ensure economic security and social inclusion; increased protection for people with significant employment limitations” [our translation]¹¹ (p. 8).

In line with the social investment perspective, many work incentive measures and programs seem to have had some success in promoting the employability of people with disabilities. However, what about those for whom these measures were not sufficient to get a well-paying job? Their benefits were indexed, which in our opinion is not “added protection” for people with severe employment limitations.

The second government action plan to combat poverty and social exclusion proposed setting up an interdepartmental committee designed to work on a new set of measures to compensate for the consequences pertaining to impairments, disabilities, and handicap situations. The purpose of this committee is to assess solutions aiming at reducing disparities between current programs and to compensate for additional costs incurred by people living with a disability (Ministère de l’Emploi et de la Solidarité sociale, 2010a).

¹¹ « l’emploi est la première solution pour assurer la sécurité économique et l’inclusion sociale des personnes; la protection accrue des personnes qui ont des contraintes sévères à l’emploi. »

In our research, we investigated the implementation of *Act 112* and its effects on people with disabilities in Québec by means of interviews conducted with key informants from the disability community and para-governmental and university sectors. Overall, actors involved in the disability domain did not actually perceive improvement in the living standard of people with disabilities. Their account instead depicted a certain laxity in the application of policies, damaging the actual improvement of the situation for people with disabilities in the areas of employment and income, among others (Archambault et al., 2013).

Finally, the latest available statistics on the rate of poverty among people with disabilities¹² did not reflect substantial improvements when it comes to people with disabilities’ financial conditions since the adoption of *Act 112*. Indeed, if we observe a significant improvement in disposable income for families between 2003 and 2009 (Ministère de l’Emploi et de la Solidarité sociale, 2010b), some groups, such as the Aboriginal single adults, refugees, recent immigrants, people with disabilities, and homeless people remain at risk of persistent poverty (Comité consultatif de lutte contre la pauvreté et l’exclusion sociale, 2009). As Noël (2007) pointed out, Québec stands out, in a Canadian liberal-inspired welfare state, by its slightly more collective and egalitarian approach, producing policies that seem to give some results in the fight against poverty. However, much remains to be done as inequality increases, and employment does not always allow people to escape poverty.

Investing for Equal Opportunities and/or for Equality of Living Conditions?

Jenson and Saint-Martin (2003) suggest various elements of comparison to illustrate the transformation between the post-war regime (anchored in social rights) and the current

¹² These data date from 2006. We were not able to obtain an update on statistics about the poverty rate among people with disabilities in Québec.

investment-oriented regime. While the first focuses on improving living conditions in the present, the second focuses on preparation for the future. Thus, policy might be less about providing citizens the right to equal conditions of living, and more about ensuring equal opportunities for future success. Such transformation of the regime emphasizes the connection between social protection and the labour market, and is likely to create new risks for citizens excluded from the knowledge-based and service-based economy. The social benefits target moves to children, education, and training, while policies are oriented towards higher employment rates (Jenson & Saint-Martin, 2003). In short, the activation-oriented income and employability policies aim to foster the inclusion of populations that have generally been excluded from the labour market up to now. However, like Cantillon and Van Lancker (2011), we consider that for those who are still unable to build the expected connections with the employment sector, exclusion is even greater. The case of young welfare recipients is a blatant example of such a problem, especially in Europe and even here in Canada. Several studies have shown that although integration measures allow some young people to get through, others accumulate failures as their personal difficulties and the labour market hinders their integration in employment; in these latter cases, activation programs always have a stigmatizing effect (Astier, 2010; Méda, 2009; Vultur, 2005). In the same vein, Lefèvre et al. (2011) refer to the people “who are permanently excluded from modes of production and consumption in society” (p. 189) [our translation]¹³ such as long-term unemployed people, homeless people, or people living with persistent mental health or physical problems, who are subject to stigma and guilt. However, the authors insist on the use of protection in the case of people with disabilities, and recall that in its first 5-year action plan to fight against poverty (2005–2010), the government of Québec had adopted the principle of

¹³ « qui sont durablement exclues des modes de production et de consommation des sociétés »

providing increased protection to people whose disabilities did not allow them access to employment (Lefèvre et al., 2011, p. 133–134).

From a social- investment perspective, it would be justified to ask what types of investments are reasonable (or profitable) to develop the skills and professional experiences, which could be used by some people with disabilities excluded from the labour market. In cases where incapacity would be serious enough to require constant supportive care and attention or a costly adaptation, preference for protection of passive income remains an option (Dumais, Prohet, & Archambault, 2012). However, from a perspective of social inclusion and equal opportunities, the question of cost-effectiveness in promoting participation is a lingering one. The challenge would be to draw the politico-administrative boundary in the implementation of programs. However, in some cases, the status of incapacity is considered by associations of people with disabilities as a denial of social rights and a lack of recognition of dignity, as well as the reason for a substantive and permanent right to protection because of special needs. This paradox is a constitutive element of the disability issue, which did not prevent the progression of these rights for 30 years and, in Québec in particular, the use of a “disability creation process” (*processus de production du handicap*) as a model of regulation in the fields of disability policy and rehabilitation services (Boucher, 2005). Therefore, the issue continues to be a challenge for the contemporary welfare state, whose double task is to protect as well as activate, since this tension is not without problems in the application of programs, eligibility criteria, and budgets (Dumais, 2012b).

From the social investment perspective, the “trilemma” thesis (Iversen & Wren, 1998) (which argues that the welfare state cannot aspire simultaneously to balance the budget and create jobs while reducing inequality) has been documented by authors such as Barbier (2009)

and Cantillon and Van Lancker (2011). Indeed, they show that, in several countries, the increase in the employment rate seems to have contributed to containing costs, but failed to reduce the number of households living in poverty. In short, the increase in active spending does not generate savings in passive spending (cf. Méda, 2009). The analysis of the situation faced by people with disabilities, particularly in Québec since the adoption of *Act 112*, seems to corroborate this fact. Substantial investments in workforce activation seem to have allowed some people to enter the labour market and improve their financial condition (Archambault et al., 2011). Nonetheless, the rate of poverty among people with disabilities remains much higher than in the rest of the population 15 to 64 years of age.

In addition, Lefèvre et al. (2011) insist on the “working poor” phenomenon. Three central dimensions are identified to explain this phenomenon: inadequate remuneration (low minimum wage), insufficient amount of work (part-time contracts) and insufficient social protection. In the case of people with disabilities, we suggest that current policies do not encourage part-time employment for those with a real, but limited capacity to work. Indeed, it is often more advantageous to keep Social Solidarity benefits and the “unfit for work” status than to have a low-paid, part-time job. Thus, it seems that some people cannot use their work potential, because of the administrative line between ability and inability to work for recipients of last resort financial assistance, in addition to the usual low pay in part-time jobs. In the light of the capability approach (Sen, 1993), one could argue that if people with disabilities that benefit from last-resort financial assistance have the freedom to participate in the labour market in the spirit of equal opportunities and social investment, they do not always have the actual ability to exercise this freedom, for example, in cases where employment would lead to increased financial

insecurity. In this context, the person would not be facing a real choice; his or her freedom does not correspond to his or her actual capacity.

In other words, it appears that, on the one hand, an overly punitive approach to activation of social policy does not promote poverty reduction, but rather generates additional social exclusion for people outside the labour market (Cantillon & Van Lancker, 2011). On the other hand, if many people with disabilities want the government to offer a protection which is improved and not conditional to employment, they do not want to be labeled as permanently "unfit", or to be excluded from any possible incursions into the labour market.

Herein we must integrate the characteristics of the field of disability to the discussion on the social investment state, particularly in the case of people with severe disabilities. The line between ability and inability cannot be dissociated from the productivity logic of the labour market, even when it best embodies the principles of human dignity and development. This line has changed in recent decades, and resistance within work environments has broken down and employment integration measures are now available. Yet, the empirical evidence has also shown that there are limits beyond which discussion and debate remain ongoing. For example, in the case of autism, we found out that many people with severe disabilities can, with socio-technical facilities, work full time in high-level jobs. However, others require continuous supportive care and attention. Finally, some people show great difficulties in acquiring or transferable skills, experience, and acquired knowledge to maintain employment. In these three specific cases, it is clear that the nature of the disability, as well as the costs of assistive technologies and other accommodations will be taken into account for decisions about hiring and activation support.

This illustrates at least three things in the evolution of social policy: 1) the humanistic approach by advancing the dignity and equal opportunity efforts bore fruit; 2) the line between

ability and inability cannot always be traced a priori with a diagnosis (although it defines, or even facilitates, access to programs); and 3) the economy of work has productivity obligations that are as vital in society as are those of solidarity. The boundary in our representations of capability and incapability has been moving for a few decades, but a definitive limit is not well defined; in fact, as we have seen, it remains paradoxical.

That is why, in response to requests for normalization from the disability movement, and to the challenge associated with activation and investment models advocated by the contemporary welfare state, social protection is still a paramount benchmark in disability social policy, and may be our only vocabulary in the design of solutions to employment for people with disabilities and their way out from poverty.

Conclusion

As we have demonstrated throughout this article, the logic of social investment and activation yielded gains consistent with the claims of the disability movement. Indeed, some obstacles that contributed to exclude people with disabilities from employment have been taken down, and arrangements have been put in place so that many people with disabilities can use their potential and find fulfillment in the labour market while improving their living and financial conditions. Collectively, the reduction of the inactivity rate is also a benefit, in a context of declining population and low economic growth.

However, we also argued that the social investment perspective offers a less suitable response for people permanently excluded from the labour market — in this case, people with severe disabilities since birth and who have never been able to build connections with the employment sector. For example, in Québec, Social Solidarity Program recipients who are

considered unfit to work will only benefit from meager financial protection that is much lower than the market basket poverty measure.

As we have highlighted in this article, impact analyses (of the early stages) associated with the social investment perspective, the equalization of opportunities and the activation of the workforce show that the increase of the participation rate does not necessarily provide the expected impact on public spending and inequality. Pertaining to people with disabilities, the latest statistics available from the *Participation and Activity Limitation Surveys* of 2001 and 2006 reflect moderate, but tangible results in terms of both reducing the number of members of a household living below the low-income threshold and increasing the employment rate (Statistics Canada, 2013). New data on employment and the financial conditions of people with disabilities are essential for an assessment of the impacts of policies and measures specific to the perspective of social investment when it comes to the income and the inclusion of people with disabilities.

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