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*Reflections on the first set of Social Quality Indicators  
from the 'European Network Social Quality Indicators'*

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*Based on the explorations of  
fourteen national reports  
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The European Foundation on Social Quality was established during the Dutch Presidency of the European Union in June 1997. The aim is to develop networks of scientists to design and to apply the new theory on social quality, to prepare for comparative research of daily circumstances in Europe, Asia and other continents. This comparability presupposes a new conceptual framework, applicable at global level, as a condition to address the current fundamental international issues related to economic, socio-political and environmental aspects of global sustainability.

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**Contents:**

Abstract.....	4
List of National Reports .....	5
1 Introduction .....	5
2 Main issues with regard to the national reports .....	5
3. The question of adequacy .....	5
4. The question of coherence .....	5
5. The question of appropriateness .....	5
6. The question of data availability .....	5
7. Preliminary conclusions .....	5
8. The European Anti-Poverty Network and social indicators .....	5
9. The view of the International Council on Social Welfare .....	5
10. Appendix: First set of ninety-five social quality indicators .....	5

## **Abstract**

This technical working-paper presents the preliminary results of reflections on the applicability of the new social quality indicators measuring the nature and changes of the four conditional factors of social quality, namely: socio-economic security, social cohesion, social inclusion and social empowerment. These indicators have been elaborated by representatives of fourteen European universities and two European oriented non-governmental organisations. This European project was financed by the European Commission (FP5) and the participating universities and NGO's. It started in 2001 and completed its work at the end of 2005. The participants of this project applied the social quality indicators in their own country, which resulted into fourteen national reports and two European reports (by both NGO's). This working-paper was based on the results of these reports. It tries to answer the issues about the (i) adequacy of these indicators, (ii) their coherence, (iii) their appropriateness, and (iv) the availability of data to use these indicators. In other words, the designers on the significance of these indicators for their own country. As a result of the collaboration with Asian scientists, this preliminary set of social quality indicators will also be explored in different Asian countries. In this working-paper this topic has been taken on board as well. The working-paper functions as one of the brick stones of the forthcoming third study by the European Foundation on the current state of the theory of social quality and its applicability for different policy areas in European and Asian countries. The European Journal of Social Quality already published some results of this project on indicators (EJSQ, Volume 5, Issues 1&2, see:[www.Berghahnbooks.com](http://www.Berghahnbooks.com)), to which document this working-paper also refers.

## **List of National Reports**

This working paper is based on the work of *The European Network Social Quality Indicators*. This network consisted of participants from 14 European universities and two NGO's (the European Anti-Poverty Network and the International Council on Social Welfare). The network published the following national reports which were taken as basis for this working paper:

1. B. Cantillon, V. de Maesschalck, *European Network Indicators of Social Quality: Belgium National Report Indicators of Social Quality*, Amsterdam (EFSQ)/University of Antwerp, 2005
2. M. Gissler, M. Vuori, *Finnish National Report Indicators of Social Quality*, Amsterdam (EFSQ)/Stakes, Helsinki, 2005.
3. D. Bouget, F. Salladarré and M. Sandi, *French National Report Indicators of Social Quality*, Amsterdam (EFSQ)/Maison des Sciences de l'Homme Ange Guépin, University of Nantes, 2005.
4. I. Ostner, St. Kühnel, M. Ebert, *German National Report Indicators of Social Quality*, Amsterdam (EFSQ)/Georg-August University, Göttingen, 2005.
5. M. Petmesidou, P. Polizoidis, *Greek National Report Indicators of Social Quality*, Amsterdam (EFSQ)/Thrace, Democritus University of Thrace, 2005.
6. E. Bukodi, S. Altorjai, *Hungarian National Report Indicators of Social Quality*, Amsterdam (EFSQ)/Hungarian Central Statistical Office, Budapest, 2005.
7. S. O'Cinneide, J. Cushen and F. O'Gaebhan, *Irish National Report Indicators of Social Quality*, Amsterdam (EFSQ)/Maynooth National University of Ireland, 2005.
8. C. Saraceno, S. Terracina, E. Cois, *Italian national Report Indicators of Social Quality*, Amsterdam (EFSQ)/University of Turin, 2005.
9. Ch. de Neubourg, P. Steffens, *Dutch national Report Indicators of Social Quality*, Amsterdam (EFSQ)/University of Maastricht, 2005.
10. H. Perista, P. Perista, I. Baptista, CESIS, *Portuguese National Report Indicators of Social Quality*, Amsterdam (EFSQ)/CESIS, Lissabon, 2005.
11. S. Mandic, R. Boskic, *Slovene National Report Indicators of Social Quality*, Amsterdam (EFSQ)/University of Ljubljana, 2005.
12. J. Monreal, S. Titos, University of Murcia, *Spanish National Report Indicators of Social Quality*, Amsterdam (EFSQ)/University of Murcia, 2005.
13. G. Therborn, S. Therborn, *Swedish National Report Indicators of Social Quality*, Amsterdam (EFSQ)/SCASSS, Uppsala, 2005.
14. S. Hacking, Sheffield University, *UK National Report Indicators of Social Quality*, Amsterdam (EFSQ)/University of Sheffield, 2005.
15. B. Demeyer, Mr F. Farrell, European Anti Poverty Network, *EAPN Report Indicators of Social Quality*, Amsterdam (EFSQ)/HIVA, University of Leuven, 2005.
16. M. Kauppinen, A. Siltaniemi, *ICSW Report Indicators of Social Quality*, Amsterdam (EFSQ)/International Council on Social Welfare, Helsinki, 2005.

## 1 Introduction

### 1.1 The European Network social quality indicators

The second main study by the European Foundation on Social Quality prepared for a project on developing social quality indicators.<sup>1</sup> It was financed by the European Commission in the context of the Framework Programme 5, as well as by fourteen participating universities from the European Union and two European based NGOs. Representatives of the Foundation, of the universities with their assistants and two European NGOs together formed a **Network** Social Quality Indicators.<sup>2</sup> The project from 2001 till 2006 was also intended as an exploratory, path clearing exercise for analysis of changes and developments in European policies. It would, first, contribute to these policies – employment, ageing, urban development, public health, and so on – by exploring the four conditional factors of social quality. These factors are: (i) socio-economic security, (ii) social cohesion, (iii) social inclusion, and (iv) social empowerment. The aim was to assess more effectively the impact of structural changes on the quality of citizens' daily circumstances. Second, the project would contribute to such a consistent system of relevant policy categories, that will create a basis to address different policy areas from the same social quality perspective. Thereby the project will contribute to an alternative approach to the 'social policy classification' in terms of three models or regimes which squeeze all European Member States into different categories. The dynamism of European welfare states is down-played by such broad comparisons, especially the rapid development of the Southern and the Eastern European States and the degree of policy convergence within the European Union.

The Network's first results have been published in national reports by the participants and their assistants<sup>3</sup> and joined for the first time in the Network's Final Report.<sup>4</sup> The European Journal of Social Quality published articles by the participants about the essence of these national reports.<sup>5</sup> We will use these publications as starting points. As argued, the Foundation's second main study functioned as starting point for the Network's project. In this study the four conditional factors are explained and connected with both other factors of social quality, see figure-1.

### 1.2 The Working paper's purpose

The European Network on Social Quality Indicators (Network) suggested a list of ninety-five indicators to analyse the nature of the four conditional factors in fourteen European countries. These indicators

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<sup>1</sup> W. A. Beck, L.J.G. van der Maesen, F. Thomése, A.C. Walker, *Social Quality: A Vision for Europe*, The Hague/London/Boston: Kluwer Law International, 2001.

<sup>2</sup> The Network's was chaired by prof. Dr Alan Walker, Department for Social Policy of the University of Sheffield and coordinated by dr Laurent J.G. van der Maesen, director European Foundation on Social Quality. For the full list of participants and assistants see the list of national reports on page 3. The Network's staff was; (i) drs Margo Keizer, (ii) drs Helma Verkleij, (iii) drs Joyce Hamilton, (iv) drs Robert Duiveman, European Foundation in Amsterdam. The Network's senior advisors were: (i) dr Wolfgang Beck, Foundation and (ii) dr Peter Herrmann, University of Cork in Ireland.

<sup>3</sup> These national reports and both reports by the European NGOs are published on the website: [www.socialquality.org](http://www.socialquality.org).

<sup>4</sup> L.J.G. van der Maesen, M. Keizer, A.C. Walker, *Final Report of the European Network of indicators Social Quality*, Amsterdam: EFSQ, April 2005 (see: [www.socialquality.org](http://www.socialquality.org)).

were published in the appendix of this working-paper (section-8). The main purpose of this working-paper is to present the conclusions or considerations of the Network's participants and their assistants about, first, the nature of the ninety-five social quality indicators as determined by the Network. Its elaboration is based on deductive approaches, inductive approaches and their connections. In the Foundation's third main study – forthcoming in 2009 – this elaboration will be explained. Second, the working-paper presents a reflection on the application of these indicators in fourteen European countries. Third, the working-paper will deliver the starting points for current Asian explorations of these social quality indicators in different Asian countries (see below). In anticipation of the Foundation's third main study a working-paper has been published about the complementarity of the human security discourses and the social quality approach. This working-paper, published by the international Institute of Social Studies, may be of interest to understand the nature of the conditional factors, also in relation to both other types of factors of social quality, namely the constitutional factors and the normative factors. It published and explained the so-called social quality architecture, see figure-1. The social quality indicators are the measurement instruments of the four conditional factors.<sup>6</sup>

**Figure-1: The social quality architecture**

<b>CONDITIONAL FACTORS</b> <i>DIMENSION OF RESOURCES</i>	<b>CONSTITUTIONAL FACTORS</b> <i>DIMENSION OF HUMAN ACTIONS</i>	<b>NORMATIVE FACTORS</b> <i>DIMENSION OF ETHIC/IDEOLOGY</i>
<i>socio-economic security</i>	<i>personal (human) security</i>	<i>social justice (equity)</i>
<i>social cohesion</i>	<i>social recognition</i>	<i>solidarity</i>
<i>social inclusion</i>	<i>social responsiveness</i>	<i>of equal value</i>
<i>Social empowerment</i>	<i>personal (human) capacity</i>	<i>human dignity</i>

With the help of the social quality indicators we will explore the European realities in a new way. Recent years have seen a huge expansion in the statistical data available to policy makers and the general public in Europe, including statistical digests from Eurostat, DG Employment's Social Situation reports and the Quality of Life in Europe series from the European Foundation for Living and Working Conditions.<sup>7</sup> While this expansion of information is a positive step, because such information is part of the life-blood of democracy, it has a paradoxical dimension. As vital as statistical data is to both policy making and political participation it tends to reinforce policy fragmentation, which makes it hard for policy makers to tackle problems in a holistic way and for citizens to comprehend what is happening to society and their daily circumstances. This is where the social quality concept comes in. A key aim of social quality is to overcome the present fragmentation of policy, for example at EU level, between welfare policies, economic policies and employment policies. By creating a coherent, theoretically grounded concept that not only embraces all policies but also all stages of the policy process, it is intended to furnish both policy makers and the general public with an analytical tool to understand

<sup>5</sup> D. Gordon (ed), Indicators of Social quality: Applications in Fourteen European Countries, *The European Journal of Social Quality*, Vol. 5, Issues 1&2 (2005), 300 pages.

<sup>6</sup> D. Gasper, L.J.G. van der Maesen, Th. Truong, A.C. Walker, 'Human Security and Social Quality: contrasts and Complementarities', The Hague: ISS/EFSQ, Working Paper Series No. 462, November 2008 ([www.iss.nl](http://www.iss.nl))

society and to change it. For example, while the ranking of countries (out of ten) for the quality of their health services in the European Foundation for Living and Working Conditions report – from 8.1 for Austria to 3.7 for Slovenia – is informative, it is not apparent how it should be used in the policy process.<sup>8</sup> A similar ranking derived from the social quality concept would point directly to policy domains and sub-domains in socio-economic security, social cohesion, social inclusion and social empowerment and the connections between them. This is precisely why the activities of the Network on Social Quality Indicators form such an important first step in realising a practical measure of social quality. The Network has identified a draft list of ninety-five indicators linked to eighteen domains and forty-nine sub-domains (section-8). The presentation of the Network's reflection of the first application may be appreciated as an important step. The reflection demonstrates, that this is obviously too unwieldy in its present form and, therefore, the next stage of work on social quality indicators will comprise the refinement and reduction of this list and its testing in a representative survey. Parallel methodological work will be conducted on the subjective and normative dimensions of social quality and on the combination of these with the indicators of the conditional factors. These next steps are dependent on European research funding.

### 1.3 Collaboration with Asian universities

More European funding would be legitimate, because something new is needed. For example, 'social indicators' or 'quality of life indicators', or 'social capital indicators' have been criticized not only for their individualistic orientation but also for leaving too many open questions.<sup>9</sup> According to Vogel in his speech for the World Conference on Quality of Life, "*new indicators are needed to supplement those of the past, including: detailed indicators of job security, the number and regularity of working hours, consumption of public services, compensation rights of certain transfer systems, total income of marginalized workers, social network support, and current trends in political participation*". As the Finnish national report states, the aspects mentioned above are all covered in the set of indicators for social quality.<sup>10</sup> We can add to this conclusion that the exploration of these objective circumstances with the help of the social quality indicators should be connected with the exploration of the subjective and normative dimensions for a real understanding of daily life. This aspect transcends the 'social indicators' and the 'quality of life indicators'.<sup>11</sup> In a recent communication the European Commission argues that '*European societies are changing fast: Europeans are living longer lives, facing unprecedented changes in family patterns, making progress towards gender equality and adjusting to*

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<sup>7</sup> L.J.G. van der Maesen, A.C. Walker, 'Indicators of Social Quality: Outcomes of the European Scientific Network', in *European Journal of Social Quality*, note-5, pp. 8-24.

<sup>8</sup> European Foundation for Living and Working conditions, '*Quality of Life in Europe*', Dublin: EFLWC, 2004.

<sup>9</sup> This theme will be discussed extensively in the Foundation's third study, forthcoming spring 2009.

<sup>10</sup> See Finnish National Report.

<sup>11</sup> See note-5 and 6. See also: A.C. Walker, L.J.G. van der Maesen, 'Social Quality and Quality of Life', in W. Glatzer, S. von Below, M. Stoffregen (eds), '*Challenges for Quality of Life in the Contemporary World*', The Hague/London/ Boston: Kluwer Academic Publishers, pp. 13-31. See further: Institut Sosial Malaysia, 'The Potential Role of Social Quality in Malaysia', *Malaysian Social Trends*, Vol.09 (2008) by the Ministry of Women, Family & Community Development.

*new patterns of mobility and diversity. Globalization, technological progress and economic developments are affecting the way we live and work, with new work opportunities, and demand for new skills and an increasing pace of change.*<sup>12</sup> The EC summarises different specific changes in the Member States and concludes by saying that the purpose of the social reality stocktaking is **to analyse afresh** the complex dynamics of social change within our societies as to be able to judge the relevance and appropriateness of current policies and to develop a solid base for the future. Thus we may conclude that according to the EC, all investments – for example the millions of euro spent on the quality of life research – are not really adequate or sufficient for analysing the complex dynamics.

Further research is also necessary due to the ongoing collaboration with Asian universities. During three conferences on social quality – in Japan, March 2006, in Taiwan, March 2007 and in mainland China 2008 – the social quality indicators were extensively discussed.<sup>13</sup> This was based on a tentative exploration of these indicators in several Asian countries<sup>14</sup> At least four questions were raised. First, to which extent do these indicators address the strong informal and familial matters in Asian countries? Second, are these indicators suitable to explore the huge role that homogeneity seems to play in Asia? Third, is the Asian interpretation of 'the social' congruent to the interpretation as suggested in a recent study comparing the human security discourses and the social quality approach?<sup>15</sup> If there is a difference, what does it mean for the proposed indicators? Fourth, how to conceive the difference between the social quality approach and, for example, the human security approach by Asian countries and the United Nations? Could both approaches deliver the starting points to develop the idea on 'sustainable welfare societies' and what does it mean for the nature of the proposed indicators by the European Network?<sup>16</sup> These questions suppose the elaboration of the subjective and normative dimensions of social quality as well (see figure-1). This short excursion may demonstrate, that also the reflection on the proposed social quality indicators should take place in a more global perspective in order to understand the outcomes of European comparative research – a main purpose of the application of these indicators – in a context that influences European circumstances as well.

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<sup>12</sup> Communication from the Commission to the European Parliament, the Council, The European Economic and Social Committee and the Committee of the Regions, '*Opportunities, access and solidarity: towards a new social vision for the 21<sup>st</sup> century Europe*', Brussels: COM (2007) 726 final, November 2007, p.3.

<sup>13</sup> '*The 9<sup>th</sup> Newsletter of the European Foundation on Social Quality*', The Hague: EFSQ, February 2009 (see: [www.socialquality.org](http://www.socialquality.org)).

<sup>14</sup> See for the application in Asia and Australia for example: (i) A.S.Oishi (Chiba University), 'Indicators of Social Quality in **Japan**', *International Journal of Social Quality*, Vol. 1, Issue 1 (2009) [forthcoming], (ii) D. Mitchell, J. Temple (Australian National University), '**Australian** Measures of Social Quality', *International Journal of Social Quality*, Vol. 1, Issue 1 (2009) [forthcoming], (iii) Y-T Wang, P-S. Yang, L-R. Wang (National Taiwan University), 'Measuring Social Quality in **Taiwanese Society**', *International Journal of Social Quality*, Vol. 1, Issue 1 (2009) [forthcoming] (iv) J.Yee, D. Chang, '*Transparency Key to Improve Social Cohesion in the **Korean** Context: Application of Social Quality Indicators*', Seoul: Seoul National University, October 2008, (v) K. Lin, K.K. Gabe, '*Social Quality Indicators for **China**: a Presentation for the Second Asian Conference on Social Quality in March 2007*', Nanjing: Nanjing University, March 2007, (vi) B. Thawilwadee (eds), '*Social Quality Indicators in **Thailand**: a Presentation on the Second Asian Conference on Social Quality*', March 2007', Bangkok: The King's Institute for Policy Studies, March 2007, (vii) R. Ngan, '*Social Quality Indicators in **Hong Kong**: a Presentation on the Second Asian Conference on Social Quality, March 2007*', Hong Kong: Hong Kong University, March 2007.

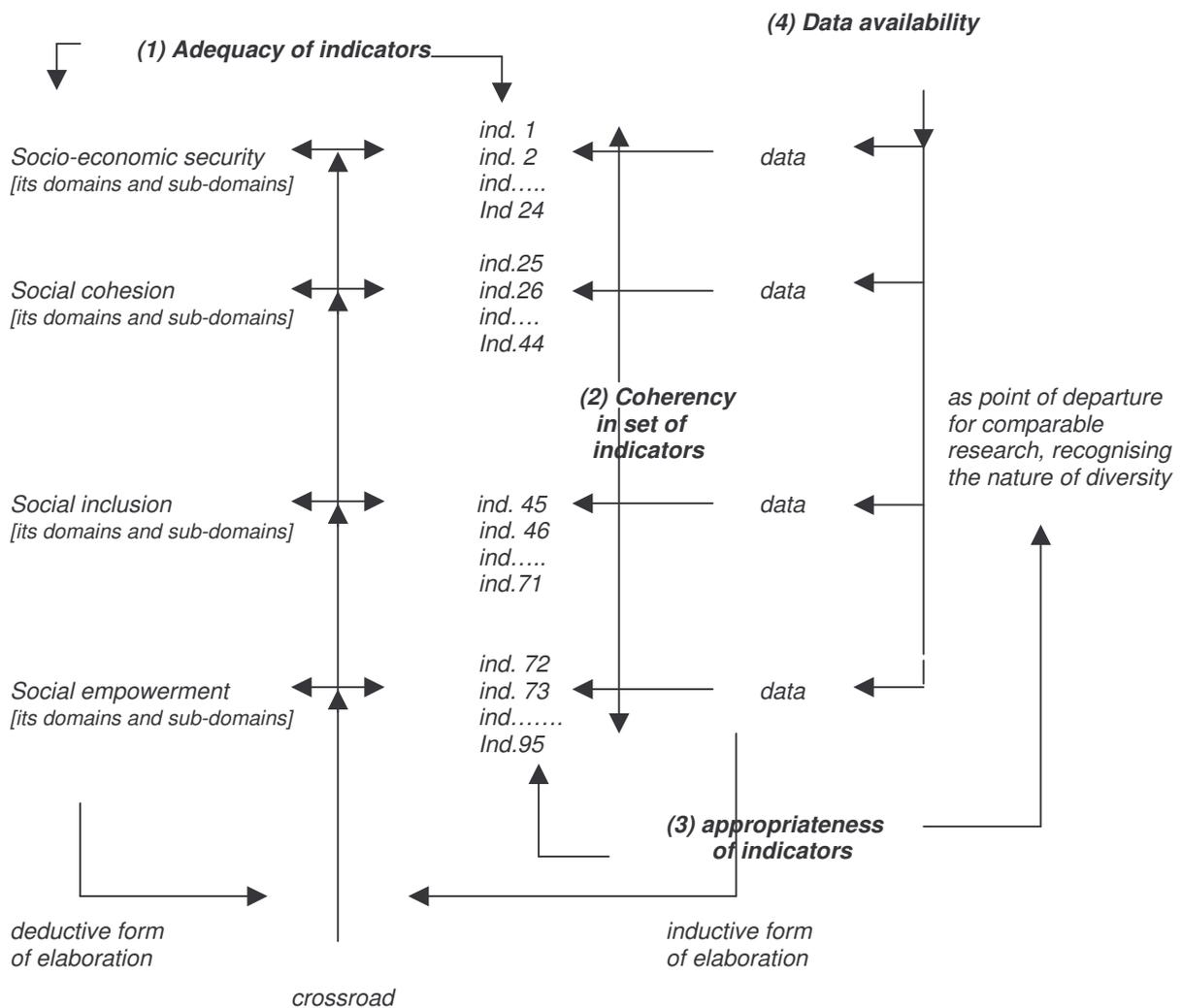
<sup>15</sup> See note-6.

<sup>16</sup> As explained, the fourth question is central in the recent study, see note-6.

1.4 Content

In an Appendix to this working-paper all indicators have been listed. They are numbered and in the following sections these numbers will be referred to. The reflection of the outcomes by the participants of the Network concern four main themes, namely (i) the adequacy, (ii) the coherency, (iii) the appropriateness of the indicators and (v) the data availability for using the indicators, see figure-2:

**Figure 2: Adequacy, coherency, appropriateness and data availability**



In the second section we will discuss some main issues of all national reports with regard to the social quality indicators. The third section concerns the question of the adequacy of some social quality indicators, based on the reflection by the Network's participants (see their national reports). This point refers to the connection of the deductive and the inductive form of indicators' elaboration. In other words, is the treatment of their crossroad acceptable? In the fourth section we will summarise some issues concerning the coherence of the proposed set of indicators. The fifth section concerns the question of the appropriateness of the indicators. Do they function as a heuristic instrument to recognise the differences between European countries and between regions of some countries? The

sixth section concerns the question of the availability of data. Section seven to nine have been dedicated to some preliminary conclusions, to which the views of the two participating NGO's (European Anti-Poverty Network and the International Council for Social Welfare) have also been taken into account.

## **2 Main issues with regard to the national reports**

### *2.1 Deductive and inductive forms of elaboration*

The Network formulated guidelines to develop comparable national reports (see page 4) They should primarily focus on the exploration of national circumstances. The data used for the indicators should come in first instance from European databases in order to facilitate comparability as much as possible. However, if European data do not reflect the national situation sufficiently, national (or even regional) data can be added to the European data and if European data are not at all available, national data are used. Furthermore, the priority is to use quantitative data, but in some cases – mostly with regard to social empowerment – the use of a qualitative description of the national situation is needed. It was decided to present data over a period from 1999 to 2001 in order to shed some light on recent trends. Finally, some variables were formulated that have not explicitly been mentioned in the indicators. Where possible and useful, a differentiation is made for each indicator to the variables: gender, age (1-10, 11-20, 21-65 and > 65). This procedure concerns especially the inductive based aspect of the elaboration of the indicators. In figure-2 we refer also to the deductive based aspect of this elaboration. During the deductive process, the four conditional factors – based on the propositions of 'the social' are distinguished in different domains and these domains are distinguished in different sub-domains. The indicators have been inductively based on existing knowledge of the essential characteristics of these sub-domains (or should be based on these characteristics). Furthermore, the data assessment of the indicators is inductively based as well. The four themes – adequacy, coherency, appropriateness and availability – are a consequence of the crossroad connection of deductive and inductive forms of elaboration. The reason is that because of this crossroad connection the outcomes are not self-evident. It concerns the connection of logical forms of reasoning and trial and error procedures. Recently, the heuristic meaning of the deductive form of reasoning is demonstrated for exploring **policy areas** as employment, public health, social housing, education, etc and **urban categories** as migrants, elderly, women, youth, handicapped as elements of the urban space.<sup>17</sup> In the following figure we will illustrate the object of both approaches. The deductive approach concerns the elaboration of the essential concepts and related domains and sub-domains, which are mentioned in the Appendix. The inductive approach concerns the empirical derivation and assessment of indicators on the basis of available data (or new data because a lack of availability), which should be adequate for the sub-domains, appropriate for understanding societal

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<sup>17</sup> L.J.G. van der Maesen, 'The experimental urban space of Laak Noord of the City of The Hague as part of the Dutch Delta Metropolis: an adequate international frame of reference?', The Hague: EFSQ, March 2009 (see: [www.socialquality.org](http://www.socialquality.org)).



As argued before when theorising social quality, developing its methodologies and methods and determining its indicators (of the conditional factors) imply far-reaching groundwork. In fact the strategy for sustainable development adopted by the European Council in Gothenburg in June 2001 – to monitor the implementation of related policies – implies such groundwork as well.<sup>18</sup> The European Commission prepared a set of indicators for monitoring this implementation, namely ‘sustainable development indicators’ (SDI). This may be a Freudian slip. They should be indicators measuring the nature of sustainability rather than developing ‘sustainable indicators’. One of the challenges is to connect economic, socio-political and environmental sustainability by relating the Gothenburg strategy and the Lisbon Strategy for making the European Union the most competitive part of the world. Therefore, a framework has been produced by experts within the SDI Task Force, elaborating the conclusions of the European Council held in Barcelona<sup>19</sup>, and the Declaration of the Johannesburg World Summit on Sustainable Development.<sup>20</sup> The Commission is aware of the need for a framework for the selection and development of indicators. Notwithstanding this, it is recognised that any framework on its own would be an imperfect tool for expressing complexities and interrelationships encompassed by this threefold sustainability as concluded in the United Nation’s report.<sup>21</sup> Independent of this conclusion, a choice has been made for ten themes to explore the threefold sustainability: economic development, poverty and social exclusion, ageing society, public health, climate change and energy, production and consumption patterns, management of natural resources, transport, good governance, global partnership.<sup>22</sup>

These themes as such are relevant, but what are the deductive and inductive based arguments for this choice? Furthermore, how to understand the nature of these empirical expressions as consequences of mechanisms and policies which transform societies in a comprehensive way? In other words, what are the ontological and epistemological characteristics of the framework used to recognise these mechanisms and to interrelate these (and other) themes? Again, the Commission recognises the overlap of the themes *“and that the scope of these themes differs considerable as some themes address a very specific domain (e.g. climate change and energy) and some (e.g. production and consumption patterns) encompass a wide variety of general socio-economic and environmental issues. Accordingly, the framework is based on a strict prioritisation of indicators inside each theme, but it ensures, with the help of standardised concepts, definitions and classifications, structuring of information in a manner that facilitates the use of indicators in the monitoring of progress in other themes too”*.<sup>23</sup> With regard to the set of selection criteria the Commission remarks that it is close to that used for the Laeken indicators. According to the Commission, an indicator *“should*

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<sup>18</sup> European Commission, ‘A Sustainable Europe for a Better World: A European Strategy for Sustainable Development’, Brussels: Commission Communication COM (2001) 264 final of 15.05.2001.

<sup>19</sup> European Commission, ‘Towards a global partnership for sustainable development’, Brussels: Commission Communication COM (2002) 82 final of 13.02.2002.

<sup>20</sup> European Commission, ‘The World Summit on Sustainable Development one year on: implementing our commitments’, Brussels: Commission Communication COM (2003) 829 final 23.12.2003.

<sup>21</sup> UN Division for Sustainable Development, ‘Indicators of sustainable Development: Guidelines and Methodologies’, New York: United Nations, 2001.

<sup>22</sup> European Commission, ‘Sustainable Development Indicators to monitor the implementation of the EU Sustainable Development Strategy’, Brussels: Commission Communication SEC (2005) 161 final of 9.2.2005.

<sup>23</sup> See note-22, page-5.

*capture the essence of the problem and have a clear and accepted normative interpretation, an indicator should be robust and statistically validated, (...) the portfolio of indicators should be as transparent and accessible as possible to the citizens of the European Union*".<sup>24</sup> This is important but it concerns the formal aspects of indicators.

How to determine the indicators of the ten themes mentioned by the Commission (and the SDI Task Force)? We may conclude, indicators for measuring the tendencies and policy outcomes with regard to the ten themes are based on a common sense understanding of the 'realities' concerning these themes. They are based on inductive forms of reasoning without confronting (or connecting) this with deductive forms of reasoning. In fact it is a form of empiricism which may be functional for the implementation of the Lisbon Agenda.<sup>25</sup> But this agenda fundamentally faded out the structural contradiction between competitiveness and sustainability in a global context.

The social quality approach, however, will start questioning the European centric approach towards globalisation as demonstrated in the Lisbon Agenda. This allows elaborating further upon key methodological differences compared the SDI approach. First, it deductively determines and applies the three types of factors for recognising the main mechanisms in order to analyse comprehensively these empirical expressions (or themes) and other themes and tries to understand their interrelatedness. Therefore it distinguishes, second, between objective, cognitive/subjective and normative dimensions. Third, it derives the domains and sub-domains of the conditional factors with the help of the connection of this deductive form of reasoning (first and second) and inductive based recognition of societal processes in a logical way from these factors. Fourth, it determines indicators as measurement instruments on the basis of this connection and not as phenomena 'sui generis' based on common sense knowledge. Fifth, as a consequence social quality indicators do not measure cognitive dimensions, and do not have a clear and accepted normative interpretation as is proposed for the SDI-indicators. As a result of this, it will also be enabled to connect on a meta-level the three different paradigmatic approaches of economic, environmental and socio-political sustainability. This meta-level is missing in the SDI. Therefore, how to underpin this threefold sustainability?

### **3. The question of adequacy**

#### *3.1 General remarks about the question of adequacy*

Social quality indicators are adequate if they express the essential characteristics of the sub-domains they are related to. This theme regards the trinomial nature of the conditional factors (and their domains and sub-domains). It concerns the adequacy with regard to the deductive form of reasoning. When analysing the outcome of the national reports can we conclude that the indicators respect the theoretical and conceptual foundations of social quality? Furthermore, it concerns the adequacy with

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<sup>24</sup> See note-22, page-5.

regard to the inductive form of reasoning. The proposed indicators, do they signal important societal trends and changes relevant for the recognising of the nature of the four conditional factors in various countries? Therefore, the theme of adequacy concerns the interpretation that the connection between the outcomes of the deductive and inductive forms of reasoning with regard to the recognition of the essential characteristics is as optimal as possible. In the national reports more than half of the considerations, questions, comments and suggestions on social quality indicators concern the theme of adequacy, namely 54 indicators. This reflection may also be strengthened by the reflection on the coherency and appropriateness, which show some relationships.

### 3.2 *General remarks about the adequacy of indicators socio-economic security*

The process of indicator development started initially with the development of indicators for the conditional factor of socio-economic security. Most time and energy was devoted to the search of well-described indicators and existing data for this conditional factor. As explained, the indicators for socio-economic security should measure if people have material and immaterial resources over time. With regard to this conditional factor two major measurement discussions have taken place in the Network. The first concerned the question if this should be measured at an household level or at the individual level. The second was directed at the importance of a life-time perspective with regard to the issue of having resources. Both issues are clearly expressed in the Italian report. Therefore we will present an extensive quotation: *“For the purpose of this report socio-economic security is intended to mean the necessary material and other resources which are available for the enhancement of the interaction of individual people as social beings. In order to properly address this, a life course perspective and longitudinal data are necessary. Actually one might even argue that this perspective is crucial to a social quality approach overall. Also the tension between an individual and a household approach must be addressed. Material circumstances in fact are to a large degree mediated by household membership and household characteristics. But assumptions concerning sharing and redistribution within households are often quite abstract (and empirically undemonstrated). Further, even when sharing and redistribution occur, different household members may have a different ‘hold’ on the resources available. Welfare policies themselves may incentive behaviours which promote a differential access not only to income but to social protection by household members. For instance in Italy, the design of family allowances disincentive wives in low income households with two or more children from working in the (official) labour market do not earn an own old age pension and must rely only on their husband’s pension and on a survivor pension if and when they become widows. What happens when separation and divorce occurs is a good example of a differential control of ‘shared’ resources: even if there was sharing during marriage, when marriage ends each spouse remains with his/her own earning capability which may have been enhanced or on the contrary reduce through marriage. Once again, only longitudinal data over a reasonable period of time may help assess the*

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<sup>25</sup> Council of European Union, *Presidency conclusions*, Lisbon: Release SN 100/100, 2000.

*actual 'hold' on resources over the life course and over different household circumstances. ECHP data are a starting point, but the observation window is too short (and the sample too small to allow to keep under control social as well as regional differences)*<sup>26</sup> As said before, this conditional factor was worked on most profoundly. Naturally the national reports did not have major comments on lacking issues, unclear indicators or the link between the indicator and the definition of the conditional factor. Most important questions were raised with regard to the sub-domains of employment security and quality of education.

### 3..3 *Specific comments on the adequacy of some indicators socio-economic security*

It was concluded that indicator **nr.4** (housing security: proportion of people who have certainty of keeping their home) is very relevant. But it is difficult to measure it in a quantitative way. Therefore, the national reports restrict themselves to descriptions of the outcomes of national housing policies. Some made a distinction between (i) number of home owners, (ii) number of renters of social housing, (iii) number of renters of private housing. This distinction is related with the costs of ownership or renting. Especially for analysing security information is needed on the costs and the affordability of housing costs. The Spanish report makes a plea for an indicator on affordability of housing costs. In that case, we may analyse the security of tenure for house owners in relation to indebtedness. In the Dutch report the theme of the relation between cost of renting and affordability is also put forward. A crucial question for developing an indicator on the affordability of housing is how to measure the costs in relation to these kind of housing policies in various European countries. With regard to indicator **nr.6** (housing conditions: number of square meters per household member) it is remarked in some reports that especially in low income groups there is a problem of overcrowding. It is therefore suggested by the German, French and Spanish reports, to analyse the problem of overcrowding in relation to household income. The same conclusion has been drawn concerning indicator **nr.7** (housing conditions: proportion of population living in houses with lack of functioning basic amenities as water, sanitation and energy). Of interest is to notice, that housing conditions in Portugal are lagging behind the European average. In Sweden and The Netherlands the housing conditions seem to be of a high quality. With regard to indicator **nr.8** (environmental conditions: people affected by criminal offences per 10.000 inhabitants) the national reports give different information. They mostly give an evaluation of the national development with regard to safety and crime. In Finland attention is paid to the change of the nature of offences, namely an increase in violent incidences resulting in physical injuries. In the German and Spanish reports the orientation concerns the feelings of insecurity. Remarkable is the significant increase of the feeling of insecurity by criminal offences in the Eastern part of Germany after the reunion. In the UK findings 40% of households in relative poverty report frequent crime in their area. A similar remark is made in the French report. The national reports stimulate to make a distinction with regard to this indicator between (i) suburban parts of higher and suburban parts of lower income groups, and (ii) the feeling of insecurity in relation to income groups.

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<sup>26</sup> See Italian National Report.

With regard to indicator **nr.11** (health services: number of medical doctors per 10.0000 inhabitants) we should, according to the Greek report, also measure the supply of nurses. A second distinction between medical doctors and nurses per clients/patients in hospitals and in the communities should be made as well. This regards the distinction and meaning of respectively intramural and extramural care in the context of modern medical techniques, see the Dutch report. Questions have been raised on indicator **nr.12** (health services: average distance to hospital). The indicator should probably address the nature of the health care services instead of the proximity. In many reports the indicator on proximity is treated in the context of 'access to hospitals' ; this concerns social inclusion. Furthermore, in the Hungarian report suggested is to add next to the quality aspect of health care a sub-domain on the health status of people regarding indicators of life-expectancy, self-reported health conditions and long term illness. Indicator **nr.13** (health services: average response time of medical ambulance) concerns, according many reports, the question of access and it concerns an aspect of social inclusion as well.

Indicator **nr.14** (care services: average number of hours spent on care etc) the Spanish report suggests that it would be more useful for Southern European countries to differentiate between the role of the family and the role of public institutions by the following two indicators: (i) time spent on caring for others (either through family or voluntary work), and (ii) coverage of public care services: number of places for pre-school children and for dependent adults (elderly) in relation to the total population. According to the Italian report, it makes more sense to measure the ability to receive care if needed. For indicators **nr.15** (employment security: length of notice before employer can change terms and conditions of labour contract) and **nr.16** (employment security: length of notice before termination of labour contract) it was remarked that these issues are regulated by labour laws in all European countries. Therefore they do not really show important trends or deficiencies for daily life which are relevant from a social quality perspective. Indicator **nr.17** (employment security: proportion employed workforce with temporary contracts) demonstrates, in the Belgium case, that the risk of poverty among temporary employees is substantially greater. Furthermore, the European trend demonstrates an increase of temporary contracts. Therefore the reports claim that this indicator is very important and should be coupled with an analysis of the consequences for workers. The indicator is not completely unequivocal. Sometimes, a temporary contract paves the way for permanent contracts.

Furthermore, and see for example the Spanish temporary contracts can be seen as a solution under circumstances of high employment. The question how to relate flexibility and security - see the question of flexicurity - may be seen as a crucial aspect of socio-economic security. This topic is extensively discussed in the Foundation's project on 'employment and social quality', financed by the European Commission.<sup>27</sup>

Indicator **nr.19** (working conditions: number of employees that reduced work time because of interruption (parental leave, medical assistance of relatives, palliative leave, etc) as a proportion of the employees who are entitled to these kinds of work time reductions is still based on descriptions in the national reports about leave opportunities. According to the national reports, this indicator needs more deepening. Two issues are combined in this indicator, namely the actual reduction of working time by employees and the entitlements to different forms of leave. This combination makes measurement difficult. Probably it should be reformulated into two indicators: one on a description of entitlements and one on work time reduction by employees with regard to different forms of leave. This important theme is discussed extensively in the Foundation's project on employment and social quality (European Journal on Social Quality, 2003). Most national reports conclude, indicator **nr.20** (working conditions: number of accidents (fatal/non-fatal) at work per 100.000 employed persons) is very relevant, because it is clear and informative and of interest for comparative research. Overall the number of accidents at work has dropped in all European countries. With regard to indicator **nr.21** (working conditions: number of hours a full-time employee typically works a week) is of interest as well. There are no large differences in Europe., It seems that the Greek have the longest working week. In the recent past -especially in France, Germany and The Netherlands – working hours have been reduced to keep wage low and to bring the unemployment rate down. In the light of new labour market and demographic developments the question is raised, if this policy of trade off between wages and working hours is durable.

Indicator **nr.24** (quality of education: proportion of students who, within a year of leaving school with or without certificate are able to find employment) seems to be not really be relevant for the quality of education. There are often other reasons for early school leaving. Perhaps this indicator would be a better measurement instrument for social empowerment. Suggestions are made in the national reports for alternative indicators, for example: (i) PIAS score (German report), (ii) an indicator on the average number of students per teacher (Dutch report), (iii) indicator on the availability of school facilities as library, computer facilities etc (Dutch report).

### 3.4 *General remarks on the adequacy of indicators social cohesion*

The indicators for social cohesion should measure if people share social relations, based on identities, values and norms. Because of this definition the indicators differ from the indicators of the other three conditional factors. The indicators for social cohesion mostly measure opinions and feelings as facts. The initial idea of the indicators' project was to formulate indicators based on the theoretical background of social quality, without bothering too much about data availability. Notwithstanding this, for social cohesion the list of the European Value Survey (EVS) was appreciated as very useful for the elaboration of social cohesion indicators and therefore it functioned as an important source of

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<sup>27</sup> F. Nectoux, L.J.G. van der Maesen, T. Korver (eds), 'Flexibility and Security in Employment', *The European Journal of Social*

inspiration. In this case, the advantage is the data availability. The disadvantage is the risk for a strait-jacket. Remarkable is in the Portuguese Report, that “a risk of being too much data led is to report on indicators, for which there are data but that are not completely adequate for the initial purpose. We believe that this risk is evident on indicator nr.28 (specific trust: (importance of family, friends respecting parents etc). Stating importance is not the same as trust. The latter is more directional, while the former is rather abstract”.<sup>28</sup>

It also seems highly remarkable that for measuring ‘shared relations’ the topic of community, local and regional festivals and happenings is not taken on board. In European culture a lot of time is spent by citizens as volunteers to organise community festivals. We may remark essential differences between these happenings in Southern Europe and Northern Europe, however in both cases they function as a real glue of creating common feelings, strengthening values and norms.

### 3..5 *Specific comments on the adequacy of some indicators social cohesion*

Indicator **nr.25** (generalised trust: extent to which most people can be trusted) demonstrates interesting differences between European regions, especially based on the historical and cultural backgrounds of these regions. The question is raised, if the data demonstrating trends and comparing European countries are really adequate. Notwithstanding this doubt, it shows a very interesting overall European picture which demands for a serious interpretation in which way different variables play a role in creating or preventing generalised trust, for example (i) the homogeneity of the population, (ii) the consequences of recent conflicts, (iii) the effects of the welfare systems. Indicator **nr.26** (specific trust: trust in government, elected representatives etc) is appreciated as a more adequate indicator than the foregoing one. In many national reports we recognise a hesitation with regard to the significance of indicator **nr.27** (specific trust: number of cases being referred to European Court of Law). Does it have to do with trust or with the supranational European legal system? The Italian report questions, if the indicator **nr.28** (specific trust: importance of family, friends etc) has to do with trust? Is the family important because of reliance in case the state does not provide enough welfare security or because of inherent family bounding? It is suggested to add or combine this indicator with the relevance (presence, absence, density) of the third sector. We already referred to the comments by the Portuguese report (section-3.4) in this respect.

Indicator **nr.29** (altruism: volunteering etc), according to many national reports, concerns the heart of the matter of responsible citizenship. It is highly relevant with regard to the social quality theme of citizenship and civil society. More research is necessary for the variables which are stimulating or preventing volunteering work in the various countries. Notwithstanding the fact that indicator **nr.30** (blood donation) is used in traditional social science as an indicator for altruism, in a general sense there is a lack of understanding in the reports what this indicator may explain. It should be

reconsidered. Indicator nr.30 (altruism: blood donation) is used in social sciences as an indicator of of altruism. Some national reports address this indicator, others do not. In a general sense there is a lack of understanding what this indicator may explain. Probably the relevance of this theme for social quality should be reconsidered.

Indicator **nr.31** (tolerance: views on immigration, pluralism and multiculturalism) is appreciated as really important. To be able to interpret this indicator in a comparative way, it is of relevance to relate it to the rate of immigration and minorities. Indicator **nr.32** (tolerance: of other people's self-identity, beliefs, etc) is important too. In many European countries this is increasing. The more religious countries still have a higher intolerance of lifestyle preferences regarding sexual and family issues, for example Italy, Spain and Greece. Noticed is a new development that needs attention, namely the changed view on political extremists, left- and right-wing.

Indicator **nr.33** (social contract: beliefs on causes of poverty etc) is strongly dependent of the European Value Survey. Some reports question whether this indicator demonstrates a real view by people on causes of poverty. Especially the Spanish report is not happy with indicator **nr.34** (social contract: willingness to pay more taxes for improving the position of the poor), because people may be willing to do something for the poor but do not agree on an increase of taxes. Do we need a re-evaluation of this indicator? This is the same for indicator **nr.35** (social contract: willingness to pay more taxes for improving the situation of elderly people). Indeed, the issue of intergenerational solidarity is becoming more important. Therefore we need an adequate indicator. The German report suggests to focus on the relationship between different societal groups (measuring conflictual perception), like old versus young, left versus right, women versus men, rich versus poor and between nationalities. Questions concerning indicator **nr.37** (social contract: division of household tasks, etc.), already put forward in the general remarks with regard to socio-economic security (section-3.2), should be taken on board in this case as well. A real problem is the question of data (see below).

Indicator **nr.38** (social networks: membership (active or inactive) of political, voluntary, charitable organisations or sport clubs) is relevant for understanding the nature of civil society. The Scandinavian countries and the Netherlands show high levels of membership or organisations, not only for personal blooming, like sports, recreation and culture, but also in NGO's and interest groups. Countries like France, Germany and Belgium show intermediate level and mostly in the personal blooming sector of sport, recreation and culture. The Southern European countries all show low levels of organization, but it was mentioned in the Italian, Spanish and Portuguese reports that membership levels are increasing. The Portuguese report mentioned explicitly that civic action was low, because of the history of dictatorship. Under democratic rule a civil society seems to awaken. The Hungarian report states that under communism especially personal networks were important. The democratic history of Eastern Europe is too short to witness the development of an active civil society. This indicator could

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<sup>28</sup> See Portuguese National Report.

thus be seen as an interesting measure for civil society, an important social quality measure. Indicator **nr.40** (social networks: frequency of contact with friends and colleagues) is supposed to be of interest as well. Data are available from time spending surveys.

Indicator **nr.41** (identity: sense of national pride) is of interest and the data are available from Eurostat and EVS. Indicator **nr.42** (identity: identification with national symbols and European symbols) is not much reported in the national reports. Instead most reports say something about European pride. The added value of this indicator on national symbols in relation to the previous indicator is questioned. Indicator **nr.43** (identity: sense of regional/local identity/community identity) is relevant in relation to indicator nr.41. It is shown by the data that regional and local identity are often stronger than national identities. Except for the smaller countries like The Netherlands and Portugal. Here national identity comes for regional and local identity. But the general trend is that the smaller the entity the higher the identification.

### 3.6 General remarks about the adequacy of indicators social inclusion

The indicators for social inclusion measure if people have access to and are integrated in various institutions and social relations that constitute everyday life. With regard to the conceptualisation and adequacy of the indicators in relation to this definition the Italian team makes an important remark. It claims that as with social cohesion, social inclusion has many levels (and inclusion at one level does not necessarily translate into inclusion at another level). Three examples are particularly telling here.

The first refers to the constraints which a strong inclusiveness into family (and its obligations) may impose on women, reducing their ability to be fully included into the labour market or in politics. The second example refers to the high dependency of the young in Mediterranean countries on family solidarity for access to housing, social protection and so forth. They are certainly not isolated, but their citizenship as individuals is somewhat constrained. These two examples are at the core of the familisation-de-familisation debate.<sup>29</sup> The third example refers to the tensions, which may be empirically found in ethnic communities, where loyalty and identification with the values and rules of that community may hinder (or even be used against) integration in the larger community. The veil-debate is the most symbolic example of this: the veil may be enforced upon women by their ethnic community, it may be used by women to express their belonging to that community, it may be used by the larger community and its institutions as an indicator of women's oppression (negating their possible agency) and lack of integration, therefore excluding those very women from participating in 'non oppressive' institutions. The Italian team concludes, that *"social inclusion is not only a matter of rights, but of a complex negotiations between different levels of belonging (and different obligations), each of which having its own formal and informal rules and power relations. The indicators proposed in the social quality approach at best grasp only the formal dimensions of inclusion, but not its internal*

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<sup>29</sup> See the Italian National Report.

*tensions. As with social cohesion, this conditional factor is highly controversial but still not fully conceptualised. The indicators exercise is useful precisely because it points both to possible debates and to theoretical problems.”*<sup>30</sup>

Furthermore, in the European discourse the antipode of social inclusion is usually social exclusion. But as Jan Berting has already noticed, the concept of social exclusion refers to the past industrial relations and the exploration of the position of individual citizens as ‘atoms of society’: *“the shift to the ‘social exclusion paradigm’ is related to the fact that the traditional class structure [in for example France] has become very fluid and that class-antagonisms, which characterized an earlier period, have almost vanished. The technological-organization changes we are now witnessing are accompanied by the very strong dominance of the ideology of the market, but the idea that only a free market is, in the long run, a good remedy for social exclusion and for many other social problems as well. In other words: social exclusion exists because society is too rigid, too reluctant to adjust to the exigencies of the market and the requirement of modern production.”*<sup>31</sup> The antipode of social inclusion – namely the lack of accessibility – is not equivalent with the traditional individualistic interpretation of social exclusion. This topic has not really been clarified in the national reports.

### 3.7 *Specific comments on the adequacy of some indicators social inclusion*

With regard to indicator **nr.45** (constitutional rights: proportion of residents with citizenship) the national reports give a description of their legal system with regard to citizenship and residents rights. About 2% to 5% of the residents have specific rights with different status, depending on national naturalisation policies. These policies seem to differ a lot across Europe. In order to evaluate the position of all citizens – can they rely on to their rights and if their rights are violated - the question is raised, if this indicator is adequate and how to pave the way for real comparative research. With regard to indicator **nr.46** (constitutional rights: proportion having right to vote etc) some national reports give information on election turnout rates. They differ a lot across Europe and over time. The British report mentions however a trend that is taking place in many European countries, namely a decreasing voting turnout. It would be interesting to differentiate the voting turnout rates to different elections (European Parliament, national parliament, regional election, municipal elections). Therefore, this indicator should be split in two separate ones: the first on rights and the second on voting turnout.

Indicator **nr.47** (social rights: proportion with a right to public pension, etc.) has led to descriptions of public pension systems in different European countries. The differences are crucial. This makes a comparison very problematic. Based on these descriptions we should re-evaluate the indicator and the important trend with regard to pensions in the context of social inclusion. Here some comments should be made. First, in various pension systems, some groups are less well protected, like self-employed

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<sup>30</sup> See the Italian National Report.

<sup>31</sup> J. Berting, C. Villain-Gandossi, ‘Urban Transformations, the French |Debate and Social Quality’, in: W.A. Beck et al, note-1, page-108.

people, women or men who are discontinuously employed during life course in, for example Germany, The Netherlands and Portugal. Second, due to demographic changes many pension systems in Europe are at risk, as in the UK and France. Third, recent changes in pension systems have led to confusion and insecurity as in Hungary. Indicator **nr.49** (civil rights: proportion with a right to free legal advice) demonstrates, that in most European countries a system or service of free legal advice is available for specific groups or based on a means test. This indicator was covered by qualitative descriptions of the availability of free advice. It should thus be evaluated if a quantitative measure is possible and desirable. Indicator **nr. 50** (civil rights: proportion experiencing discrimination) has been interpreted in most national reports as racial discrimination or discrimination of minorities. Together with gender discrimination with regard to wages these themes have already been covered under indicator nr.48. Therefore, this indicator needs a more precise definition on which kind of discrimination should be focussed on.

Indicator **nr.53** (access to paid employment: long-term unemployment) is, according to the national reports, an important measure for the access to paid employment. It is also a known indicator in European research. This indicator demonstrates that for many people falling into unemployment, it is difficult to re-enter the labour market. An adequate analysis about which economic and social mechanisms cause long-term unemployment is highly important. Therefore this indicator should probably be coupled with an indicator on the reasons for long-term employment. With regard to this sub-domain of the labour market, an important remark has been made in the French report. It says, that *“Access to paid employment is the first pillar (social protection can be seen as the second one) which paves the way for people to avoid poverty. Nevertheless, exclusion from the labour market (therefore the goods and services market) is not uniquely due to unemployment. Working conditions can be a yardstick of the different degrees of integration in, or exclusion from the labour market. Precariousness in the working conditions lies also at the root of exclusion, i.e. low wages, low social protection, bad health, environment, etc.”*<sup>32</sup> These issues are however regarded under the conditional factor of socio-economic security. It is clear that a cross-factor analysis on this subject is of importance for social inclusion and socio-economic security. In other words, the French report refers to the theme of coherency of the set of indicators, see the following section.

With regard to indicator **nr.56** (housing: proportion homeless etc) it is concluded that the reasons for homelessness or sleeping rough are not unequivocal. This indicator does not unravel why these people do not have access to proper housing. Understanding the causes of this lack of access is important for the social quality perspective. This indicator should probably be elaborated with survey data on the reasons for people being homeless. This information would be interesting for recognizing trends and tendencies and for comparative analysis. In connection with indicator nr.4 it is recognised concerning indicator **nr.57** (housing: average waiting time for social housing), that in some countries social housing plays a more important role than in other countries. This variety in social housing

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<sup>32</sup> See the French National Report.

policies in Europe complicates comparability. With regard to inclusion on the housing market it is suggested in many reports to look especially at the access to the housing market (public and private) of the young. In Spain, Greece and Sweden for example it is reported, that young people have difficulty to get hold of their own place to live. They live with their parents for a long time.

With regard to indicator **nr.61** (financial services: proportion denied credit differentiated by income groups), various reports mention that access to credits is easier for higher income households, than for the lower income households. Therefore the Slovenian report suggests to measure the level of income necessary to be entitled to credit and to measure how many households earn less than the required income. Another suggestion is made in the Hungarian report namely to relate savings and credits. Indicator **nr.63** (transport: proportion of population which has access to public transport systems) is reported to be problematic, because many people have access to public transport but are not inclined to use it. The indicator will have to discriminate between willingness and access. This is also the case with indicator **nr.64** (transport: density of public transport system etc). The reports underline the importance of this indicator but at this stage it is not clear or not specific enough for comparative research.

Indicator **nr.69** (social networks: proportion feeling lonely/isolated) regards, according many reports, the heart of the matter of social inclusion. The national reports conclude, that loneliness and isolation under the population is growing. Especially the elderly form a risk group with regard to isolation and with the demographic changes in mind, this issue will thus grow in importance. For this indicator we will have to evaluate the available surveys and indices, like for example the 'social isolation index' by Gallie and Paugam.

### 3.8 *General remarks about the adequacy of indicators social empowerment*

The indicators for social empowerment measure if the personal capabilities of individual people and their ability to act are enhanced by social relations. The Italian team remarks, that "*this is possibly the most interesting conditional factor, but in the social quality proposal it is still most undeveloped and unfocused. It is also the most difficult factor to find quantitative indicators for. As is well known, the UNPD – see its capability approach - has tried some operationaliation which probably should have been taken more into account in the social quality work (and particularly the concept of 'combined capabilities' by Marta Nussbaum. But even in that approach, there is still a wide gap between theoretical sophistication and operationalisation through indicators*".<sup>33</sup> But the social quality challenge is to find indicators for social empowerment which go beyond the subjective power of the individual in terms of self-esteem. It is concerned on power and empowerment as establishing and designing a relationship between people. Furthermore, it has to be considered that the actual aim of any empowerment is access and participation in the sense of changing the social and societal

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<sup>33</sup> See the Italian National Report.

environment. In other words, the output is personal power in its combination to social power, which goes beyond the capability approach.<sup>34</sup>

Furthermore, monitoring and policy development with regard to that issues covered under socio-economic security and social inclusion is quite developed, this is not the case with regard to social empowerment. With regard to European mainstream policies, we do not recognise major attention to this theme as a key factor for an integrated policy approach. The starting point of such policies is economic growth (interpreted as 'economic integrity') rather than individual and social life as value. Consequently, we do not find any mention of it in European policies. Looking at the European agenda in general and the Lisbon strategy more in particular, they follow the triangular approach which pronouncedly figured in the Social Policy Agenda from 2000, which had been released as the complement of the Lisbon strategy.<sup>35</sup> Consequently, the countries seem to differ a lot when evaluating the outcomes of the indicators. The question is however if this is due to the reliability on national data and the European incomparability of these national data or to actual differences between the countries.

### 3.9 *Specific comments on the adequacy of some indicators social empowerment*

Indicator **nr.78** (control of employment contract: percentage of labour force that is member of a trade union) should be regarded in a national and historical perspective. According to the national reports, in most European countries the role of trade unions is changing and membership levels are decreasing due to a change in production relations and production factors. For example, in Eastern European countries under the communist regimes trade union membership was obliged. In the new situation with a market economy new trade unions were introduced. Membership rates decreased enormously also due to mass unemployment. In the Netherlands trade union membership is low because of a tripartite system of consultation and collective agreements of labour contracts. In other words, there is a whole world behind this indicator and we have to reflect on which issues are most important for empowerment of citizens. This is the same concerning indicator **nr.79** (control over employment contract: percentage of labour force covered by a collective agreement). There are big differences throughout Europe due to historical reasons. Coverage of collective agreements is high in France, The Netherlands, Sweden, Finland and low in the UK and Hungary. In the south of Europe there is a difference between the public and the private sector. In Greece mostly private sector is covered, in Italy and Portugal the public sector. Also the processes of collective agreement differ a lot. It is sometimes bipartite (Belgium and Sweden), sometimes tripartite (The Netherlands and Slovenia). There seems to be indications that like trade union membership, also coverage of collective agreements are decreasing, for example in Germany and The Netherlands. In other words, here too, there is a whole world behind this indicator and we have to reflect on which issues are most important for the empowerment of citizens.

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<sup>34</sup> P.; Herrmann, 'Empowerment: The Core of Social Quality', in: D. Gordon (ed), see note-5, pp. 289-299.

Indicator **nr.80** (prospects of job mobility: percentage of employed labour force receiving work based training) also causes difficulties. We may conclude from many reports, that the indicator does not reflect forms of training (public and private) for employees and unemployed people. From the data used in the national reports it became clear that at this stage an international comparison is impossible. There are many different programmes and schemes and it is sometimes difficult to make a distinction., Which schemes and programmes are provided by the employer and which are publicly funded? In many cases there are hybrid programmes, that are partly financed by the state and partly by the employer. When are programmes explicitly provided for employed people to develop their employability and adaptability and when for unemployed people? This important theme has extensively been discussed in a project on employment and social quality'.<sup>36</sup> The outcomes are congruent with the conclusions of the national reports on social quality indicators. The enormous developments in this policy area over the last years makes it even more complicated to give a clear and consistent picture. The question is how to approach this complex and obscure landscape of job mobility due to training? There is one indicator developed by Eurostat on life-long learning: percentage of the adult population aged 25-64 participating in education and training (over the four weeks prior to the survey). But this indicator does not distinguish between public and private financed training or between employed and unemployed. The same conclusion can be made for indicator **nr.81** (prospects of job mobility: percentage labour force availing of publicly provided training), and indicator **nr.82** (prospects of job mobility: percentage of labour force participating in any 'back to work scheme').

About indicator **nr.85** (openness and supportiveness of political system: existence of processes of consultation and direct democracy) the reports demonstrate differences between countries about ideas of referenda as methods for direct democracy. In some countries they have been used already for a long time: for example in Sweden, Slovenia since the independence already seven referenda took place, France, UK for consultation, Italy on a repeating basis. Other countries recently started to experiment as the Netherlands and Spain. There are countries as Belgium, who suppose referenda are unconstitutional in a representative democracy. With regard to the actual formulation of this indicator, there is some overlap with indicator nr.95 about consultation of residents by major reforms. We will have to formulate this indicator more precisely and add the differentiation of governmental level (national regional and local).

With regard to indicator **nr.86** (openness of economic system: number of instances of public involvement in major economic decision making), the national reports interpret 'openness' in different ways. It's essence – in the context of social empowerment – is not defined clearly enough. The original idea of this important indicator is that it relates to the discussion about the kind of economic system we would like to live in. Do we accept an economic system that operates entirely according to the rules of economic functioning or do we want to be able to influence the impact of the economic system on our community life? In the German report for example, it has also been remarked that – the

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<sup>35</sup> P. Herrmann, see note-34.

other way around – local communities provide favourite investment conditions to attract firms. This topic needs to be deepened for being really adequate to measure this sub-domain of social empowerment. More discussion and research is also necessary for deepening indicator **nr.87** (openness of organisations: percentage of organisations/institutions with work councils). The national reports present many arguments. There exists a EU Work Councils Directive for organisations with over 50 employees. It is interesting to measure the operationalisation of the Directive in the various European countries. In the UK and Ireland for example, work councils are not a feature of consultation and negotiation within firms. In Sweden, workplace trade unions fulfil the role of work councils. Furthermore, this indicator should also be related to firms with more than 50 employees. In Spain there is a high number of small enterprises (that are not obliged to have work councils). Therefore we will find in this country a low representation of employees in organisations. However it will also be of interest to be more focussed on the actual influence of the employee's representation instead of only measuring their existence. In Hungary for example trade unions have more rights than work councils.

Behind indicator **nr.89** (public space: marches and demonstrations banned in the past 12 months etc) there is a whole world that we should reflect upon for making new steps in the process of operationalisation. In the reports different developments are mentioned which support the necessity for developing a good and relevant indicator on this issue. In the UK, Ireland and Slovenia concern is expressed with regard to new laws restricting freedom of assembly. In Italy the feeling of empowerment is undermined by the systemic defeat of protest. According to the national reports, indicator **nr.93** (personal relationships:percentage of national and local budgets devoted to disabled people) is highly important. Notwithstanding this, the Italian report mentions the underdevelopment of the empowerment of disabled people in this set of social quality indicators. We may notice, that the issue is differently covered in the reports. The German and Hungarian report give information about the labour market participation of disabled people. Other reports give information on the percentage of social expenditure on disabled or as percentage of GDP. According to the Finnish report, the information on budgets should also be related to the number of disabled. The overall tendency is that the attention for disabled people seem to be growing, but this does not mean that their situation is improving. Furthermore, government spending and attention does not say so much about the actual living conditions of disabled people. Concluded is that the indicator needs specification.

## **4. The question of coherence**

### *4.1 General remarks about the question of the coherency*

In this section we will present the considerations put forward in the national reports concerning the coherence of the proposed set of indicators. In a negative sense, the question is, if we can find unclear overlaps of some indicators for the conditional factors respectively or between these factors.

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<sup>36</sup> See note-27.

In other words, will some indicators prevent a real discrimination between the nature of the conditional factors? This theme concerns the cross conditional factor analysis. According to the national reports, especially many proposed indicators of social inclusion demonstrate overlap with indicators of socio-economic security, social cohesion and social empowerment. In positive sense, the question of coherence refer to the theme of the mutual relationship of indicators within the conditional factors respectively and between the conditional factors. By strengthening the mutual relationship the coherence in the set of social quality indicators will be strengthened as well. This theme is related with the trinomial nature of the conditional factors. This theoretical question will be elaborated in the Foundation's third main study. Due the many questions about the adequacy of indicators – see foregoing section – and the appropriateness –see following section – this interesting theme has not been discussed in the national reports. It will be taken on board at the next stage of the elaboration of the social quality indicators. In this section we will discuss 14 indicators.

#### 4.2 *Concerning the coherence of the indicators socio-economic security*

Indicator **nr.1** (income sufficiency: part of household income spent on health, clothing, food and housing etc) shows overlap with other indicators concerning aspects of health and housing costs in other sub-domains of socio-economic security. Furthermore, it is difficult to find sufficiently comparable data. In the German report a proposal was put forward for alternative indicators, namely to assess the income sufficiently based on a counting of twenty living stand items like TV, computer, holiday trip etc., differentiated by social group. If households lack more than six standard items it is considered as under-supplied. Of interest is that this proposed indicator reflects the quality of living conditions as a core question of social quality.

#### 4.3 *Concerning the coherence of the indicators social cohesion*

The Spanish report suggests that some aspects of the sub-domain social contract, namely by indicators nr. 34, 35 and 36, can be adequately reflected through a single indicator, which can be easily derived from the EVS 2000. With this question 81 people are asked to what extent they would be prepared to actually do something to improve the conditions of their immediate family, people in their neighbourhood/community, elderly people, immigrants and sick and disabled people in their country. Other categories might be included in the formulation of this question in different countries. This corresponds to the formulation of indicator **nr.36** (social contract: willingness to actually do something practical for the people in your community/neighbourhood). A change is attractive because no data are found with regard to this formulation. As already suggested in the Spanish report, the proposal of indicators referred to paying more taxes (nr.34 and nr.35) might be subjected to bias, in the sense that people may be really concerned about the situation of any of those groups, and still not agree on an increase in taxes. Nevertheless, the challenge here is to have indicators to recognise a stronger commitment to providing help than only asking if people are prepared to help others. A totally

different approach of the issue of social contract is proposed in the German report. It suggests to develop indicators on the relationship between different societal groups (measuring conflictual perception), like old versus young, left versus right, women versus men, rich versus poor and between nationalities. In other words the question of coherency is strongly related with the question of adequacy as well.

According to many national reports, indicator **nr.44** (interpersonal identity: sense of belonging to family and kinship network) is already covered by indicator nr.28 (section-3.5), under which was shown that family is of high importance and that the feeling of belonging to family networks is strong in all European countries. It however is reported that networks of friends are growing in importance, but it does not seem that those friendship networks are replacing family networks. The indicator has also a lot of common with indicator nr.39, namely support received from family, neighbours and friends (section-6.3). It will be useful to rethink the relationship between these indicators.

#### 4.4 *Concerning the coherence of the indicators social inclusion*

Especially some indicators for the domain of services tend to show overlap with indicators concerning socio-economic security. The question at stake is which aspects of these services are social inclusion and which are socio-economic related. The difference should be found in that social inclusion should focus on aspects of 'access to' and 'integration in' and socio-economic security should focus on the aspect of 'availability' and 'security'. Seen in this context indicator **nr.55** (health services: proportions with entitlement to and using public primary health care) is of interest. In most national reports it is noticed that the health care system is highly inclusive. But this is already clear from the application of indicator nr.10 (section-5.4). So we should reconsider the specificity of this indicator for social inclusion. The application of indicator **nr.58** (education: school participation rates and higher education participation rates) demonstrates, the overall educational participation in Europe is high due to the existence of a system of compulsory education for basic education. In the light of the debate about the knowledge based economy, it is important to know more about the level of higher education participation and the reasons for not accessing high education. Notwithstanding this, the reports conclude, that these indicators should be made more specific compared to the issue of early school drop outs and affordability of higher educations, discussed under respectively indicator nr.22 (section-5.2) and indicator nr.23 (section-3.2). The difference between access to and coverage should be more elaborated.

Indicator **nr.60** (social care: average waiting time for care services) shows overlap with indicator nr.94 (section-4.5) on the level of pre- and post-school child care for social empowerment. Again a distinction should be made between the social inclusion and the social empowerment aspect. For these indicators hold that the complexity of the care systems is insufficiently expressed in the respective indicators in order to discriminate more sharply between their relations with the different

conditional factors. This point is also discussed under indicator nr.59 (section-5.4). The complication, mentioned in the national reports are: In many reports indicator **nr.62** (financial services: access to financial assistance and advise in case of need) information is provided on the level of indebtedness instead of financial assistance and advise. Proposals are to relate this indicator with the level of indebtedness. This makes sense, because indicator nr.77 of social empowerment is also focussing on availability of advice and guidance centres, not specifically for financial affairs but more in general (see below). When shifting the theme to indebtedness, the question of discrimination between social inclusion and socio-economic security should be posed as well.

Indicator **nr.67** (neighbourhood participation: proportion in regular contact with neighbours) is covered in the conditional factor of social cohesion, namely indicator nr.39 (section-6.3). Therefore we should discriminate more precisely which aspects of this indicator refer to social cohesion and which to social inclusion. This is also the case with indicator **nr.68** (friendships: proportion feeling lonely/isolated). We should express the essence of 'access' compared to 'informal assistance' as is explained under indicator nr.39 of social cohesion. Indicator **nr.71** (family life: informal (non-monetary) assistance received by different types of family) is covered by indicator nr.39 as well. In other words, the challenge is to rethink the differences between these indicators of social inclusion and social cohesion. The question is what can be said about the domains of social networks in the context of social cohesion and what in the context of social inclusion.

#### 4.5 *Concerning the coherence of the indicators social empowerment*

Indicator **nr.77** (user friendliness of information: availability of free advocacy, advice and guidance centres) is more or less addressed with the social inclusion indicator nr.49 (section-3.6). Furthermore, the issue of advice and guidance with regard to financial problems is discussed in social inclusion indicator nr.62 (section-4.4). In other words, we should reflect more on the discrimination between related social inclusion and social empowerment indicators. This will be also the case with indicator **nr.83** (reconciliation of work and family life: percentage of organisations operating work life balance policies). In most countries solutions for this are found in forms of flexibilisation of working time. According to the national reports, new policies with regard to flexible working patters are found in, for example, Germany, France, UK, Ireland, Finland and Hungary :see also the social quality project on flexicurity and security in employment.<sup>37</sup> In Finland flexible working hours and teleworking go together with parental leave opportunities and child care facilities. Also in Sweden the work life balance is a major policy objective. However the Southern European countries are characterised by limited policy initiatives. The indicators for this sub-domain on reconciliation of work and family life should be related to the indicators of care leave under the conditional factors of social inclusion and socio-economic security.

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<sup>37</sup> See note-5.

The same is true for indicator **nr.84** (reconciliation of work and family life: percentage of employed labour force actually making use of work/life balance measures). One tendency that could be discerned is that women are more often making use of work/life balance measures than men. Indicator **nr.94** (personal support services: level of pre-and-post-school child care) is already connected with indicator nr.59 of social inclusion (section-5.3). Again, the challenge is to think about which aspects of child care should be related to social inclusion and which to social empowerment. This issue is also partly reflected upon by the sub-domain or reconciliation of work and family

## **5. The question of appropriateness**

### *5.1 General remarks about the question of appropriateness*

Although the outcomes, namely the final set of indicators, meet the request for new indicators by Vogel, this project has shown the difficulty in developing this set appropriately. Societal issues and policy development are contextual based. For example, if policy is to be developed to improve the participation of women on the labour market, this is closely related to family policy issues in the respective countries. Child care facilities for example can enable parents to take up job responsibilities. The arrangement of these facilities however differ a lot across Europe. According to the national reports, in a general sense these facilities are provided by the public sector in Scandinavian countries, in The Netherlands and Great-Britain by the private sector and in Southern Europe by the family. These differences go back to longstanding national traditions, based on the interpretation of national roles and the responsibility of the state. Therefore behind issues like care for the elderly, housing, education, health care one should be aware of these differences. For the Network the challenge was to formulate indicators that are receptive for these differences and at the same time show trends and changes over time.

The attention for differences was nicely expressed by the British contribution: *“for social quality, the framework of the four conditional factors offers a useful comparative structure to balance UK domains against a standardised European collective representation of what it is that defines and shapes social values in each country. The development of social welfare in Britain cannot progress independently, it must have a reference group. Social and cultural expectations relative to a reference group are key to how personal and community happiness and aspirations are conceived individually. The best reference group is obviously one from a nation similar in culture, outlook, economic base, population and social structure. Therefore benchmarking of these very simple characteristics is primary to comparison. Use of social quality indicators on a national scale to benchmark progress with Europe is important for Britain to understand and appreciate the differences in European goals, needs and wants and to synthesise a common goal for Europe if not a common language. If British people are expected to have an active interest and to participate in European policy and convergence, the first step is to have an understanding of the divergences in culture, what is expected for the quality of their lives and*

*the commonalities between countries. This will reduce the fear, very commonly expressed in the media, of a bland super culture Europe, where everything is the same*".<sup>38</sup>.

Next to the attention for national differences within Europe, it was discussed in the Network that regional differences within one country can be as big as certain national differences across Europe. The question was posed if we should develop indicators that measure on an individual level or on an aggregate level, regional or even European level. Although this discussion was not finalised in the Network, it was decided to focus this project on the national level, keeping in mind the regional differences. There are a few reports that give clear statements regarding these regional differences. First of all, as remarked by the Belgium team, the fact that some countries are a federal state with communities and regions is in two ways relevant when looking at social quality. In the first place, because of a division of competences, the Federal government, the communities and their regions are equal from a legal viewpoint but have powers and responsibilities for different fields. For the areas of their competence, the regions and communities have their own law and policy making. To the extent that the (sub)domains of the conditional factors are related to competences assigned to the regions or communities, the outcomes might be different for each of those entities. In the second place, regions and communities have their own social-economic characteristics. The outcomes for the country as a whole often conceal pronounced differences between the regions, concerning employment, risk of poverty, early school leaving (Belgium report). In Italy the historical based difference between the South and the North caused an absence of a national framework for economic and welfare policies. For many years this has added further to this regional diversity: *"the result was that local welfare regimes might be as different across Italy as they were at the national level across Europe, offering, but also testifying, different degrees and understandings of what citizenship is about. Differences (and inequalities) in local societies interact with 'standard' differences (and inequalities) such as those deriving from social class, gender, ethnicity, and autochthonous or migrant status – something strengthening and sometime weakening them."*<sup>39</sup>

With this in mind an indicator is appropriate, if it is susceptible for differences between countries and between regions of some large countries, and if it functions as a heuristic instrument to recognise trends and changes over time. If it seems to not be susceptible enough the indicator in question should be changed. Its determination is also a question of trial and error. The difference with the adequacy is explainable. Adequacy concerns – and see section-3 – the extent to which an indicator expresses the essential characteristics of the sub-domain. This point is strongly related with the deductive form of reasoning. If an indicator is not appropriate, it cannot be adequate as well. But if an indicator is adequate, it does not have to be appropriate. That means that in the following stage of the elaboration of social quality indicators all adequate indicators should be tested for their degree of appropriateness because it is highly important to recognise differences for a real comparison of daily circumstances in European countries. In this section 7 indicators are discussed.

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<sup>38</sup> See the British National Report.

## 5.2 Concerning the appropriateness of the indicators socio-economic security

Indicator **nr.3** (income security: proportion of total population living in households etc) shed light on the role of social transfers in different European countries. In the case of Greece we can conclude that social transfers are not very effective. The risk of poverty before social transfers is more or less equal to the EU average, namely 34%. After social transfers the risk of poverty has dropped to 31%, which is high above EU average. This is remarkable conclusion and it concerns the effectiveness or lack of effectiveness of the existing welfare policies. In Sweden we will find a contrary tendency. Before social transfers we may notice a rather strong inequality in income distribution and after the transfers the inequality and risk of poverty is reduced enormously. In other words Sweden has a highly redistributive system. In the case of Italy we notice a measurement problem. Due to its fragmented and regionalised system the effect of social transfers is difficult to measure.

With regard to indicator **nr.22** (security of education: proportion of pupils leaving education without finishing compulsory education) it makes sense to rethink how to measure this indicator because it became clear from the national reports, that the compulsory education systems differ a lot between European countries. For example in Belgium the compulsory system ends at the age of 18, while in many other countries this age is 16. In The Netherlands we see a high proportion of premature school leavers - 20% compare to the EU 15 average around 18% - however most of early school leavers find a job in the labour market as a result of relative favourable labour market conditions. In France, contrary to The Netherlands, there is a lower rate of early school-leavers (although still 15%) but these under-skilled youngsters have difficulties with entrance to the labour market. Portugal is known for its structural educational problems, here the compulsory education lasts to the age of 15 and the proportion of early school leavers is highest in Europe, 41% according to Eurostat in 2003. In the UK the majority of young people leaving education enter governmental funded training schemes. But it is important to mention that they have no right to any form of benefit like for example in The Netherlands. Unknown remains what the state of youth unemployment is in Britain. Germany shows a low rate of early school drop outs but there are higher risks for certain groups, especially boys from a Turkish background. This topic of this indicators is highly important but it should be better related to the educational systems in the European countries for adequate comparative research and the indicator should be related to the consequences of early drop-out.

Measuring indicator **nr.23** (education: study fees as proportion of national mean net wage) seemed to be problematic. This has to do with the different educational systems in European countries. Although the Bachelor Master structure is slowly introduced in more and more European countries, the syntonisation of educational systems will take many more eras. In the national reports interesting issues are mentioned, but at this stage comparison is difficult. Some countries work with study fees

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<sup>39</sup> See the Italian National Report.

coupled with a system of subsidies, in other countries the schooling system is free of charges, but subsidies are non-existent. The question remains thus how to compare citizens' costs for schooling in different European countries?

### 5.3 *Concerning the appropriateness of the indicators social cohesion*

In the Greek national report a general remark is made concerning indicators social cohesion. They are not completely appropriate for the specific Greek situation: *"Available information on indicators of social cohesion cannot fully capture most of the peculiar characteristics of Greek society. Strong ties at the family/kin level have traditionally contributed to a relatively cohesive society, even though collective solidarity has persistently been weak in Greece. Socio-economic integration was effected through 'vertical' clientele networks, rather than through the more 'horizontal', class-based patterns of Northwest European countries. Political parties dominate over civil society, and the latter has up to now hardly been able to build its own system of values and rules outside the sphere of the state. What is more, a contradictory relationship between state and society is prevalent: a considerable part of the population derives revenue from direct or indirect access to the state apparatus, while, at the same time, an incessant confrontation with state institutions and policies is observed (hence an 'over-politicization' of social life). To mention also that the statist-paternalistic mode of social organization favours an extensive reproduction of the socio-professional groups that constitute the traditional middle classes, alongside an bloated public administration. These conditions have historically formed the basis for the socio-political integration of large sections of the middle and lower middle classes. Further, the sudden experience of a new phenomenon of large-scale (mostly illegal) immigration, over the last decade, with serious multi-faceted effects on economy and society obviously had important repercussions on social cohesion in Greece that until the late 1980s was a more or less culturally homogenous society."* <sup>40</sup>

### 5.4 *Concerning the appropriateness of the indicators social inclusion*

Especially with regard to this conditional factor the inclusiveness in the health care sector is discussed. The qualitative descriptions in the national reports show – by lack of quantitative based data – the national differences. The Italian report concludes for example, that indicator **nr.10** (health and care: proportion of people covered by compulsory/voluntary health insurance) does not signal the differences in levels of coverage, access and quality of services. Furthermore, in several countries it is becoming more and more common to pay extra charges next to the national or general health insurance for medical services. This is the case in Sweden, The Netherlands, Germany and UK. This phenomenon increases the possibility of a growing inequality between different social groups and it undermines the universality of health care services as is explicitly mentioned in the Greek report. The French report concludes, that the French original system of universality is becoming means tested.

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<sup>40</sup> See the Greek National Report.

Although the national state provides the poor with free complementary health insurance in order to reduce inequality. In several reports the aspect of waiting lists for surgeries is mentioned as an increasing problem. As a result of this private medical care is becoming more popular amongst the well-to-do in the UK. This is a phenomenon which can be recognised in other parts of Europe as well. These remarks invite us to relate this indicator with the nature and cost of coverage and the differences between types of insurance and its change over time. Furthermore, we have to distinguish between the public and the private insurance systems and the consequences of this distinction for all types of income groups. All these themes also reflect an aspect of inclusiveness in the health care system. In other words the national reports demonstrate, with regard to these indicators, the necessity to elaborate the difference between the coverage of health care services (socio-economic security) and with regard to the access of health care services (social inclusion). It concerns the combination of the cross conditional factor analysis and the question of appropriateness. Next to this issue, the cultural differences between the health care systems are shown as well. Some countries have a system based on universality others on contributions, some systems are mostly publicly funded while others have a stronger private basis. The question with regard to the development of social quality indicators is how to recognise the different backgrounds and the related trends and changes in these systems.

In almost all conditional factors there is an indicator about (social) care. For social inclusion this is indicator **nr.59** (social care: proportion of people in need receiving care services). This is, according to the reports, a very interesting indicator, but a manifold of different issues have been reported. Therefore a more precise choice should be made about the essence of care services with regard to social inclusion and in relation to the issues relating to care under the conditional factors of socio-economic security indicator nr.14, social cohesion indicator nr.39, and social empowerment indicator nr.83 and nr.94. For all these indicators hold, that the complexity and differentiation of the care system should be expressed more clearly in order to discriminate more sharply between their relations with the conditional factors respectively. It does concern the cross conditional factor analysis as well as its appropriateness. The manifold of issues mentioned in the national reports are: (i) the system of care services: is it private, public or mixed, (ii) the quality of the care services, (iii) care for different age groups, like child care and care for the elderly (care at home or institutional care), (iv) the provider of care: is it the municipality, private institutions or the family, (v) differentiation between paid and unpaid care, (vi) gender division between care givers, (vii) time spent on care. These complications go back to cultural differences with respect to care in European countries. In the South and in some Eastern European countries the family is seen as the primary care 'institution'. With this in mind, the Spanish team suggests that it would be more useful for Southern European countries to differentiate between the role of the family and the role of public institutions by the following two indicators (i) time spent on caring for others (either through family or voluntary work), (ii) coverage of public care services, namely the number of places for pre-school children and for dependent adults elderly) in relation to the total population. In the Scandinavian countries a system of public care is dominant and in Germany,

France, The Netherlands, Belgium care is organised in the private sector or in various combinations of public and private services. The German and Swedish report explicitly mention that the welfare state took over family solidarity.

#### 5.5 *Concerning the appropriateness of the indicators social empowerment*

With regard to indicator **nr.72** (application of knowledge: extent to which social mobility is knowledge-based), the national reports have used different measurement methods to illustrate social mobility. Some showed the educational level of the population over time (Italian report), others used social background as predictor of education attainment (Belgium report), another showed that many employed work under their level of education (French report), the next presents data about the participation rate of university students from disadvantaged background (UK report), and yet another relates social mobility to labour market rigidity or fluidity (German and Swedish reports). In other words, a more specific and adequate understanding of this indicator is needed. However, the information given in the national reports is valuable and the issue is important for social empowerment and the debate about the knowledge based economy. The same is true for indicator **nr.74** (availability of information: availability of free media). As main source the ' Reporters without Borders' is used to evaluate press freedom. But a heterogeneous picture is shown about the media landscape in European countries. For example in Italy, where the foregoing prime-minister at that time, Berlusconi, controls both public and private media, or in Spain where government controls public media and one left-wing corporation is controlling the private media. Also Slovenia shows state control over the media and a restrictive media regulation. In France a duo-pole press situation is reported, or in other words low media plurality. The UK reports press freedom, although the BBC is attacked for unfair representation and newspapers often have a partly political stance. On the other hand Sweden, Finland, Ireland, Germany, Portugal, Belgium, Hungary and Greece report free media, with Sweden and Hungary explicitly mentioning a pluralistic media landscape and Finland reporting that the press is unaffiliated. This indicator however needs a higher level of appropriateness in order to develop concrete starting points for comparative research.

## **6. The question of data availability**

### 6.1 *General remarks about the question of data availability*

In the second section we referred to the guidelines for developing comparable national reports. In these guidelines by the Network, it was proposed to use European databases as much as possible in order to guarantee the comparability of the national reports. Given the differences of data availability concerning the indicators of the four conditional factors, we will present the conclusions in the national reports about this in the following subsections. It concerns questions related to 23 indicators.

### 6.2 *Concerning data availability of indicators socio-economic security*

As mentioned before, the Network has spent an important part of its time on this conditional factor. Moreover a lot of research and development of indicators has been done in Europe concerning issues related to this conditional factor. Some of the indicators can also be found for example in the European Commissions' set of structural indicators on social cohesion. Therefore, the data indicators for this factor are quite elaborated and precise already. International databases like Eurostat, ECHP or OECD also provide a lot of data for the indicators for socio-economic security. However in some cases the social quality indicators have deliberately been defined slightly different than in existing databases. This means that the authors of the national reports have described the situation in their country with regard to the social quality indicator as well as possible by using and interpreting the data of the above mentioned database, and by adding national data if necessary. This is the case for example with regard to indicator **nr.2** (income security: how do certain biographical events affect the risk of poverty on household level). Many reports conclude that it is really difficult to find the exact data for this indicator. Many reports have presented some considerations about the risk of poverty for various groups in society as an approximation of this indicator. On the surface this seems to be adequate but it does not really address the link we try to evaluate between important moments in people's lives and their impact on household income. This is stated in the Irish report as follows: *"Under the Irish system payments are not exclusively tied to previous income, preventing an exact percentage assessment of how biographical events impact upon household incomes. In most cases a scale of payments exists, linked to past contributions. The objective of the flat rate system is to reduce consistent poverty and raise low-income thresholds. A number of 'free schemes' exist to support transfers targeted towards specific biographical events such as free heat, electricity, TV license, telephone rental, medical care and public travel."*<sup>41</sup> The Hungarian report stresses the link between poverty risk and education. Individuals' education appears to exert the largest impact on the distribution of and the changes in income inequalities in Hungary. According to a recent study (Toth, 2003), in 1987 only 8% of the total household income inequalities was explained by household head's educational attainment. By 2001 this figure had risen to 27%. It is thus suggested to add education as one of the biographical events.<sup>42</sup> In fact this theme is highly related with the question of adequacy as well. For other indicators for which data are available side remarks are made concerning the reliability of the data and the adequacy of the indicator. This is for example the case with regard to indicator **nr.3** (income security: proportion of total population living in household receiving entitlement transfers).

The Italian report remarks that *"Excluding pensions, social transfers in Italy are scarce and fragmented. The data concerning the proportion of the total population receiving means-tested benefits are very partial and should be read with caution. The variety, fragmentation, and heterogeneity in the forms of delivery as well as of the public body responsible for it, render it difficult to detect all those who receive such benefits (particularly in the case of minimum income benefits, which are always local). It is likely that survey data under-represent them. Thus this indicator, conceptual and policy-wise important, cannot be really constructed in Italy, with the partial exception of*

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<sup>41</sup> See the Irish National Report.

*the elderly and the disabled receiving the social assistance pension or indemnity.*<sup>43</sup> In this case the data question is related with the question of appropriateness as well. In many reports this indicator was combined with the better known measure of Gini coefficients, which shed a light on the (in)equality of income distribution in the country. This is an interesting addition, but the Gini coefficient does not inform us if social transfers allow people in risk of poverty to live above the EU poverty level after social transfers. With regard to the same indicator, in the French report it is remarked that the use of the European poverty line (being 60 percent of national mean income) is extremely ambiguous because it measures relative poverty and not absolute poverty. It can therefore be said that it is a rough indicator of inequality.<sup>44</sup> The appropriateness of this indicator has been discussed before (section-5.2)

A few indicators deliver serious problems with regard to data availability. This is, for example, the case with indicator **nr.5** (housing security: proportion of hidden families). The reason is, that it is almost impossible to provide data on the living situation of people in the same house. In several national reports the authors reflected on issues like for example young people staying with their parents for a long period of their life, for example in Slovenia, Spain and most of the other southern countries. This also has to do with various dimensions, like high housing costs and insufficient housing stock, but also with changing family relationships, historical determined traditions and economic reasons. It remains difficult to interpret the outcomes of this indicator. Possibly we have to rethink the purpose of this indicator. Indicator **nr.9** (environmental conditions: proportion living in households that are situated in neighbourhoods with above average pollution rate) is, according to the national reports, an interesting indicator. But because of the lack of data on the specific situations in neighbourhoods, it is difficult to measure. For example pollution data are only available on a national level and do not tell us so much about the specific living conditions in neighbourhoods. Especially pollution rates with regard to the noise and quality of air are related to urban regions. It is remarked that pollution levels decreased due to recent environmental policies and the restructuring of economic production relations (see for example the Hungarian and Slovenian report). The UK report referred to the difference in air quality between areas of high and low income groups. In the last case air pollution was more serious. Apparently air pollution could also be related to the issue of poverty. Notwithstanding this, in the Greek case it is noticed that Athens and Thessaloniki have high levels of pollution. In other words it regards as well the concentration of people in large cities. Supposed is the EC sustainability indicators on 'health risks due to environmental conditions could be used as source of inspiration.

Also indicator **nr.14** (care services: average number of hours spent on care differentiated by paid and unpaid) is problematic with regard to the data availability. In general this sub-domain and its indicator address a very important aspect of the daily life of citizens. But at the same time we may conclude that there is a lack of data to measure the rate between paid and unpaid care. Especially data on time

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<sup>42</sup> See the Hungarian National Report.

<sup>43</sup> See the Italian National Report.

<sup>44</sup> See the French National Report.

spent on paid care are lacking. However, survey data on time spent on unpaid care (differentiated between children and adults) are available. We already discussed this indicator with regard to its adequacy (section-1.4.3). Due to the issue of data and adequacy many reports suggest to distinguish between: (i) public and private care, (ii) between age groups, (iii) between paid and unpaid groups, (iv) between gender of care givers, and (v) to differentiate in time spent on care. Indicator **nr.18** (employment security: proportion of workforce that is illegal) is, according to the national reports, very important. Illegal work often comes together with low security and modern forms of exploitation. However, there are serious measurement problems.

### 6.3 *Concerning data availability of indicators social cohesion*

The advantage of using European Value Survey (EVS) as source of inspiration is data availability. For eleven of the twenty social cohesion indicators the data of the EVS could be used. However, as mentioned before, we should be careful with the interpretation of most of the survey data. In some national reports the authors doubt if these questionnaires are sensible enough for recognising cultural differences within the European Union with regard to social cohesion. Another useful database for indicators of social cohesion is delivered by Eurostat, which provides data for nine of the indicators of social cohesion. This is not the case for indicator **nr.36** (social contract: willingness to actually do something practical for the people in your community/neighbourhood). No data were found in such detail. There are data in a more general sense on willingness to do something for the community or the neighbourhood. But it was decided in the process of indicator formulation that this willingness should be expressed in a concrete and practical sense. This is impossible due to the lack of available data. Indicator **nr.39** (social networks: support received from family, neighbours and friends) is also problematic. According to most of the reports, we may recognise that measuring actual support from different social groups in a quantitative way is difficult due to a lack of data. Most reports mention contact levels, although it was agreed during the phase of indicator development that actual support was more interesting from a social quality perspective. The German and Swedish reports explicitly mention that the welfare state took over family solidarity. The Swedish report however states that the Swedes show a high willingness to do something for the social environment. The Southern European countries and Hungary report on high importance of family support, especially with regard to child care by grandparents to enable sons and daughter to go to work. The UK report states that community cohesion has declined in recent years, but that 31% did actually help neighbours. Only the Italian report provides data on help received: it was reported that 15% received help, either from family or from friends. The Belgium report gives survey data on people that can not count on help. In Belgium 13% of the population, especially low schooled and people with low income have this problem of not being able to count on help from others. This theme is highly crucial in a social quality perspective. It would be interesting to increase data availability in the future.

### 6.4 *Concerning the data availability of indicators social inclusion*

With regard to social inclusion there are also specific measurement problems. This is for example the case with indicator **nr.48** (social rights: women's pay as a proportion of men's). For an adequate comparison between the wages of women and men the data should be controlled for occupation, branch, age and education. This is done in Sweden and Finland, and this shows that if the data are corrected the gender pay gap is lower. However, as noticed in the Italian report, we should not forget that women often work in occupations which are rewarded lower. Therefore, this indicator should probably be distinguished into two indicators, taking into account both issues. Possibly, this issue on gender discrimination should be an aspect of the overall indicator on discrimination, namely indicator nr.50 (section-3.6). For indicator **nr.51** (economic and political networks: proportion of ethnic minority groups elected or appointed to parliament, boards of private companies and foundations) no data are available. In many countries like France, discrimination legislation requires that racial differences should not be reported. This policy strengthens the data problematic. In other words, the indicator is simply impossible to measure. Notwithstanding this, the indicator remains highly important.

Indicator **nr.54** (access to paid employment: involuntary part-time or temporary unemployment) focuses on the involuntary aspect, because part-time or temporary employment could be a personal choice. Overall in Europe the level of involuntary part-time employment is high, except in The Netherlands. Here we find a high level of part-time employment, but it is mostly voluntary. In Greece on the contrary part-time employment is mostly involuntary, especially for men. Where in Finland involuntary part-time work is decreasing, this is increasing in France. The European countries thus show a varied picture. With regard to involuntary temporary employment the same problem appears. In many cases temporary employment is not accepted on a voluntary basis. From the national reports it seems to be more difficult to find data on involuntary temporary employment than on involuntary part-time employment. However, this indicator is however highly important for analysing the state of affairs of social inclusion.

Indicator **nr.56** (housing: proportion homeless, sleeping rough) is supposed to be highly adequate (section-3.6). FEANTSA provides information on this issue as this is their topic of research, but still data availability is problematic or unreliable. Most reports give estimations and often they were only able to provide estimations for a certain number of large cities and not on a national level. As said earlier, the causes for homelessness or sleeping rough are not unequivocal. Finally indicator **nr.65** (civic/cultural services: number of public sport facilities per 10.000 inhabitants) and indicator **nr.66** (civic/cultural services: number of public and private civic and cultural facilities) have serious problems with data availability. It is unclear which facilities are exactly counted by the national data provided. These are interesting issues for social inclusion but it should be evaluated how exactly this could be measured in a comparable way. With regard to indicator **nr.70** (family life: duration of contact with relatives), most national reports focus either on frequency of contacts or time spent with relatives. This does not clarify the issue of duration, which from a social quality perspective is meant as a proxy

for the quality of the relationship. The reasons for the change of orientation is the lack of data available for this matter. Therefore we have to rethink how to cope with this lack of data.

#### 6.5 *Concerning data availability of indicators social empowerment*

In the national reports interesting descriptions have been provided to reflect on issues concerning the sub-domains of social empowerment. But in many cases reliable data could not be found. International comparable data are only available for a limited number of indicators. Where national data are provided, they are mostly inconvenient for international comparison. Another interesting issue of indicators of social empowerment concerns the conclusion, that most of them are related with a historical based cultural background, that should be taken into account when interpreting the outcomes of the quantitative data. This is especially the case with indicators referring to labour market relations. In most European countries the role of trade unions is changing and membership levels are decreasing because of changes in production relations. For example in Eastern European countries under the communist regimes trade union membership was obliged. In the new situation with market economy new trade unions were introduced. Membership rates decreased enormously also due to mass employment. This question is important for analysing empowerment of citizens. There are also considerable differences throughout Europe with regard to coverage of collective agreements: high in France, The Netherlands, Sweden and Finland, low in the UK and Hungary. In the south of Europe there is a difference between the public and the private sector. In Greece mostly the private sector is covered, in Italy and Portugal the public sector is best covered. Also processes concerning collective agreements differ a lot: sometimes bipartite (in Belgium and Sweden), sometimes tripartite (The Netherlands and Slovenia).

With regard to indicator **nr.73** (availability of information: percentage of population literate and numerate) the comparability is difficult as some national reports used PIAS scores and other IALS scores. Germany and The Netherlands, Finland and Sweden seem to score high on literacy levels of the population. Hungary, Italy, Portugal, France and Ireland score a low level of literacy under the adult population. The Spanish report notices a huge generational difference. An evaluation of the two data bases is needed. The national reports demonstrate, with regard to indicator **nr.75** (availability of information: access to internet) an enormous increase in many countries of internet use. In Portugal we will find the highest increase over the last few year. In 1999 it was lagging behind, and in 2002 the use was above EU average. Especially Greece and Hungary are however lagging behind the European average. For the sake of comparability it should be decided which survey data is to be used for this indicator.

Indicator **nr.76** (user friendliness of information: provision of information in multiple languages on social services) is problematic to measure. The national reports provide descriptions of possibilities, but can mostly not provide quantitative measures. Some reports mention the use of internet sites of

governments in different languages, others provide information about the possibility of assistance by translators. From the information provided in the national reports there seem to be considerable European differences again. Possibly, this issue should be connected with the issue of minorities and the number of immigrants and foreigners. According to many national reports, indicator **nr.88** (support for collective action: percentage of the national and local public budget that is reserved for voluntary, not-for-profit citizenship initiatives) is highly relevant for social empowerment. The indicators of this sub-domain together with indicator nr.29 and nr.38 on membership of organisations and clubs (social cohesion) provide information about the state of civil society in Europe. However, we seem to encounter a measurement problem. Data on national and local public budget reserved for voluntary, non-for-profit citizenship initiatives are difficult to generate and to compare. The national reports present a manifold of data on behalf of indicator **nr.90** (cultural enrichment: proportion of local and national budget allocated to all cultural activities). But the question is the lack of comparability on European level. No data exist for indicator **nr.91** (cultural enrichment: number of self-organised cultural groups and events). Only Eurostat provides some information on behalf of indicator **nr.92** (cultural enrichment: proportion of people experiencing different forms of personal enrichment on a regular basis), namely on the percentage of total household consumption expenditure on recreation and culture. However, this does not give information on attendance of cultural activities.

According to the national reports indicator nr.95 (support for social interaction, extent of inclusiveness of housing and environmental design) is very interesting for the question of social empowerment. However, it is difficult to measure with quantitative data. A few interesting tendencies were observed. In Germany and Spain the attention of inclusiveness of citizens in environmental design is growing. In Germany this is shown by the project 'Soziale Stadt', and in Spain attention for meeting places and green areas in urban development is growing. In France, the UK and Ireland it is explicitly mentioned that the government has specific procedures for consultation and information of citizens. In Slovenia concern is expressed because many public spaces are sold to commercial users, which leads to less information and influence for citizens.

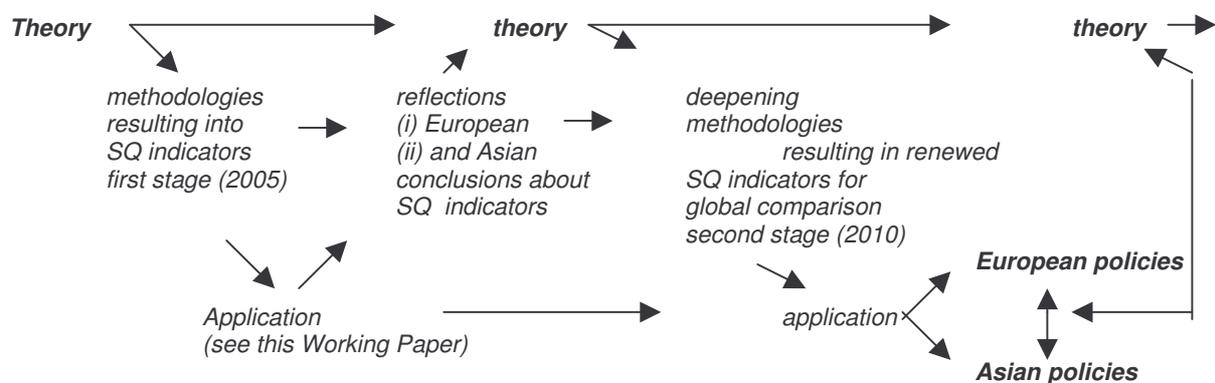
## **7. Preliminary conclusions**

As already argued, the social quality approach differs from comparable approaches to develop indicators in order to explore daily circumstances of people in a comparable way. This approach is focused on - and see figure-2 - four questions about social quality indicators. These concern (i) their adequacy, (ii) their coherency, (iii) their appropriateness and (iv) the availability of data for applying these indicators. These four questions are also strongly related with the deductive and the inductive forms or reasoning. In other words, they refer to the essence of the methodologies and methods for elaborating the social quality approach. At this stage the national European reports about the first application of the proposed social quality indicators are especially focused on the heuristic meaning of the indicators and not on conclusions about the reality of the daily circumstances in the fourteen European countries. For example it was concluded that some indicators do not discriminate

sufficiently between aspects of the four conditional factors respectively (question of adequacy). That in other cases indicators overlap each other (question of coherency). Furthermore, sometimes indicators are not completely functional for recognising the differences between countries or regions (question of appropriateness). Finally, that sometimes the heuristic meaning of an indicator for measuring an aspect of the daily circumstances (with regard to a sub-domain of a conditional factor) is high or very high, but that we cannot find any data for their assessment (question of data availability).

Naturally, the social quality indicators should be applied in order to analyse outcomes of policies and for contributing to the renewal of policies by governments, local authorities, non-for-profit organisations, companies, NGO's and groups or organised citizens. However, at this stage the meaning of these indicators was prioritised. The national reports present a collective research for the elaboration of these indicators and the outcomes should be used for deepening this search. In other words, for enhancing their adequacy, coherency, appropriateness and for looking for new data. The importance of this search will increase since Asian universities are in the process of studying the outcomes of the European national reports. Their question is if we can use these indicators for exploring Asian daily circumstances. If a comparison between European and Asian countries is worthwhile, the four questions above should be placed in a global perspective as well. Firstly, Asian scientists may analyse the reflection of the indicators as put forward in this working-paper. Second, they should add their comments with the help of their interpretation of Asian circumstances. After this procedure, European and Asian scientists will be enabled, thirdly, to enhance the heuristic meaning of the (changed) social quality indicators for comparative research in a global perspective. This will result in a new figure, comparable to figure-4 as presented in the double issue of the European Journal on Social Quality on the results of the Network:

**Figure-4: Development social quality indicators<sup>45</sup>**



Based on the work carried out for the urban space of Laak-Noord of The City of The Hague – see the recent working-paper<sup>46</sup> - the Foundation in collaboration with other academic institutes prepared a project-proposal about sustainable global cities.<sup>47</sup> This project-proposal demonstrates the urgency for developing global applicable indicators in order to understand and compare daily circumstances in Asian global cities (Bangkok, Nanjing, Seoul, Taipei, Delhi etc), European global cities (Lisbon, Lyon, Naples etc) and global cities in other continents (Johannesburg, Porto Alegre etc). It delivers the arguments to strengthen the collaboration.

Although the 'quality' of the social quality indicators was given priority, the first European application inspires a tentative exploration of trends, recognised with the help of their first application. The results of this exploration will be presented in the forthcoming study by the Foundation.<sup>48</sup>

## **8. The European Anti-Poverty Network and social indicators**

The European Anti-Poverty Network was one of the two European NGO's participating in the Network on Indicators on Social Quality. It lobbied successfully for the adoption of the 'Social Inclusion Strategy in Lisbon. In 1999 it published a paper calling for a European strategy against poverty and social exclusion parallel to the employment strategy. It lobbied successfully for the adoption of the 'Social Inclusion Strategy in Lisbon. In relation to this strategy the EAPN recommends and advocates among others a legal basis for the strategy and a stronger and more transparent policy coordination. The EAPN also carried out research on 'poverty indicators' which was run by five national EAPN networks (Germany, France, Italy, Portugal and the Netherlands), and research on 'indicators on social inclusion' supported by the Belgium government. The EAPN feel a shared view on the direction in which the European policy should develop. *"For both approaches attempts are being made to enforce coherence between economic, employment and social policies, on the theoretical level and on the action level. This view is present in the social quality theory."*

The EAPN has three pillars that form the basis of its activities: the promotion of fundamental rights by all and the view that poverty is a denial of fundamental rights, the promotion of an integrated, multidimensional approach and action at local, national and European level (the fight against exclusion) and the promotion of participation including those affected by poverty. The EAPN argues:

*Many of the elements that are present in the three pillars that form the starting point for action for EAPN are also present in the social quality theory, and in particular the four conditional factors with*

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<sup>45</sup> See note-5, page-14. The figure has changed somewhat in order to connect the current work in Asia with European work on social quality indicators.

<sup>46</sup> See note-17.

<sup>47</sup> K. van Dijken,, L.J.G. van der Maesen, H. Verkleij, 'A proposal for DG Research of the European Commission (FP7) about the sustainable development of fourteen global cities', The Hague: NICIS/EFSQ/ISS, January 2009. Sixteen documents were presented from all participating global cities and members of the proposed Steering Group in order to complete the proposal.

<sup>48</sup> See note-9.

*their domains and sub-domains. For example the notion of 'having access to fundamental rights' is important for social inclusion as a conditional factor for social quality. The multi-dimensional approach of EAPN can be found in the interdependency of the four conditional factors for social quality. Perhaps a more prominent place for the notion of 'participation' can be advocated in the further elaboration of empowerment as conditional factor in the social quality approach. And finally, the broad view that is taken in defining social quality with its many different aspects is powerful and comes close to the one taken by EAPN in defining poverty and social exclusion<sup>49</sup>*

## **9. The view of the International Council on Social Welfare**

The second European NGO taking part in the Network on Indicators Social Quality was the International Council on Social Welfare. The ICSW represents social NGOs from more than 70 countries worldwide, and its mission is to advance social welfare, social justice and social development. The ICSW observes the existing cultural differences with regard to the notion of 'welfare', even within Europe. *'We might say that the ENIQ Project has attempted to bring different cultures of welfare under the common umbrella of social quality. At indicator level and in relation to the reduction of poverty the ICSW finds it particularly important that the number of homeless people has been included, in spite of the methodological problems that may be connected to it.*

In its report the ICSW comments on the advantages of the ENIQ in comparison with other indicator projects: *'On the European level ENIQ is an exceptionally extensive and theoretically well founded indicator project. Its roots and starting points (for instance the Amsterdam Declaration) also go back to the civic society. It has originally a stronger support-base than the technocratic indicator packages that are mainly based on political and administrative goals. [ ] There are many indicator projects relevant in relation to social policy being undertaken in Europe today. Each of them has its own special characteristics and strong points. Yet the different projects resort to the same individual indicators because of their accessibility and availability of data. Strong theoretical background work is one of the special characteristics of the indicators of social quality. However, at least at this stage, the picture of welfare created through social quality is based on existing data. Indicators have been seen as important instruments for following up and steering the consequences of political measures. They direct the attention of the political system of decision-making to the existing problems. In addition, non-governmental organisations benefit from indicators in trying to decrease poverty and other causes of disadvantaged conditions. The indicators of social quality and the picture they provide of social quality as a whole help us to direct attention widely, not only to individual problems or defects but also to structural issues. Thus they can promote the development of long-term social policy, in which problems can be seen more clearly as parts of the whole situation, and in which it is possible to find solutions even to individual problems through the whole unity. This may help to create policy in which attention is paid to social, economic, and cultural aspects all together.'*<sup>50</sup>

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<sup>49</sup> See note-5, pp. 262-274.

<sup>50</sup> See note-5, pp. 275-288.

## 10. Appendix: First set of ninety-five social quality indicators

In this section we will present the list of indicators of the four conditional factors as a whole. The arguments for the choice of these indicators as a cross road connection of deductive and inductive form of elaboration will be presented in the Foundation's third study, forthcoming spring 2009.

### 8.1 : Socio-economic security

Domains	Sub-domains	Indicators	Remark	Data source
Financial resources	Income sufficiency	1. Part of household income spent on health, clothing, food and housing (in the lower and median household incomes)	a. 'lower' refers to everyone with income below 60% of the national median income. b. part of household income or part of household expenditures	National data
	Income security	2. How do certain biographical events affect the <i>risk of poverty</i> on household level.	a. at household level b. a qualitative description on eligibility and duration of transfer should be incorporated. c. biographical events: - health – illness/ disability, - employment-unemployment, - employment-retirement, - dual parent-single parent family, - child birth	National data and ECHP
		3. Proportion of total population living in households receiving entitlement transfers (means-tested, cash and in-kind transfers) that allow them to live above EU poverty level	a. look at income situation <i>before &amp; after</i> the entitlement transfers b. if data is available look at means-tested, cash and in-kind transfers. The in-kind transfers from the government are interesting as they are often larger than cash transfers (benefits, pensions, etc.) to poor households. c. EU poverty level = 60 % of national mean income	Eurostat
Housing and environment	Housing security	4. Proportion of people who have certainty of keeping their home	a. measured by housing affordability methodology* b. add qualitative description of national housing security situation	National data (and see suggestions below *)
		5. Proportion of hidden families (i.e. several families within the same household)	a. new presentation of the indicator on living with family or friends in case of emergency. b. using Eurostat's definition of a family and a household	National Census and/or survey micro data
	Housing conditions	6. Number of square meters per household member		Eurostat
		7. proportion of population living in houses with <i>lack</i> of functioning basic amenities (water, sanitation and energy)		Eurostat
	Environmental conditions (social and natural)	8. people affected by criminal offences per 10.000 inhabitants	a. if possible differentiate between rural/urban & types of criminal offence	National/regional data
		9. Proportion living in households that are situated in neighbourhoods with above average pollution rate (water, air and noise)	a. pollution data mostly available on national level	UN sustainable development, Eurobarometer, EU structural indicators
	Health and care	Security of health	10. Proportion of people covered by	a. qualitative description of the

	provisions	compulsory/ voluntary health insurance (including qualitative exploration of what is and what is not covered by insurance system)	national health insurance system	
	Health services	11. Number of medical doctors per 10.000 inhabitants		Eurostat
		12. Average distance to hospital, measure in minutes, not in meters		National data
		13. Average response time of medical ambulance		National data
	Care services	14. Average number of hours spent on care differentiated by paid and unpaid	care for four specific groups: disabled, children from 0-3, children from 3-6, and care for the elderly	National data
Work	Employment security	15. Length of notice before employer can change terms and conditions of labour relation/contract		National data
		16. Length of notice before termination of labour contract		National data
		17. proportion employed workforce with temporary, non permanent, job contract		Eurostat
		18. Proportion of workforce that is illegal	a. estimations	OECD
	Working conditions	19. Number of employees that reduced work time because of interruption (parental leave, medical assistance of relative, palliative leave) as a proportion of the employees who are entitled to these kinds of work time reductions		national data
		20. Number of accidents (fatal / non-fatal) at work per 100.000 employed persons (if possible: per sector)		Eurostat
21. Number of hours a full-time employee typically works a week (actual working week)			National data	
Education	Security of education	22. Proportion of pupils leaving education without finishing compulsory education (early school leavers)		Eurostat
		23. Study fees as proportion of national mean net wage	a. Besides fees also subsidies should be taken into account b. all levels of education	National data
	Quality of education	24. Proportion of students who, within a year of leaving school with or without certificate, are able to find employment	a. in context of general labour market conditions b. the relation between the level of education and the level of wage is of importance	OECD / PISA

## 8.2 Social cohesion

I – Institutional (political) – macro  
C – Community – meso  
F – Family and neighbourhood – micro

Domains	Sub-domains	Indicators	Remark	Data source
Trust	Generalised trust	25. Extent to which 'most people can be trusted' <b>I, C, F</b>		EVS - Question 8
	Specific trust	26. Trust in: government; elected representatives; political parties; armed forces; legal system; the media; trade unions, police;		Eurobarometer (?); EVS - Question 58

		religious institutions; civil service; economic transactions <b>I</b>		
		27. Number of cases being referred to European Court of law		Eurobarometer
		28. Importance of: family; friends; leisure; politics; respecting parents. parents' duty to children <b>F</b>		EVS; Question 1, 47 & 48
Other integrative norms and values	Altruism	29. Volunteering: number of hours per week <b>I, C</b>		EVS; Question 5 & 6 and ECHP
		30. Blood donation <b>I</b>		Eurobarometer
	Tolerance	31. Views on immigration, pluralism and multiculturalism <b>I, C</b>		EVS; Question 74 & 75 and Eurobarometer
		32. Tolerance of other people's self-identity, beliefs, behaviour and lifestyle preferences <b>C, F</b>		EVS; Question 7 & 65 and Eurobarometer special edition on Migration
	Social contract	33. Beliefs on causes of poverty: individual or structural <b>I, C</b>		EVS; Question 11 & 12
		34. Willingness to pay more taxes if you were sure that it would improve the situation of the poor		Eurobarometer
		35. Intergenerational: willingness to pay 1% more taxes in order to improve the situation of elderly people in your country <b>I, C</b>		??, maybe Eurobarometer
36. Willingness to actually do something practical for the people in your community/ neighbourhood, like: <ul style="list-style-type: none"> <li>- picking up litter,</li> <li>- doing some shopping for elderly/ disabled/ sick people in your neighbourhood,</li> <li>- assisting neighbours/ community members with filling out (fax/ municipal/ etc) forms,</li> <li>- cleaning the street/ porch/ doorway,</li> <li>- etc.</li> </ul>		Not based on existing survey questions	??	
		37. Division of household tasks between men and women: Do you have an understanding with your husband/ spouse about the division of household tasks, raising of the children, and gaining household income?	Not based on existing survey questions	??
Social networks	Networks	38. Membership (active or inactive) of political, voluntary, charitable organisations or sport clubs		EVS; question 5. Eurobarometer
		39. Support received from family, neighbours and friends <b>F</b>		UNDP on grand-parents care for grand-children and Medical outcome study social support survey
		40. Frequency of contact with friends and colleagues		EVS Question 6
Identity	National/ European identity	41. Sense of national pride <b>I</b>		Eurobarometer & EVS Question 71
		42. Identification with national symbols and European symbols <b>I</b>		Eurobarometer
	Regional/ community/ local identity	43. Sense of regional / community / local identity <b>C, F</b>		Eurobarometer and EVS Question 67
	Interpersonal identity	44. Sense of belonging to family and kinship network <b>C, F</b>		Eurobarometer

At 3 levels: International/Societal (Ma); Institutional (me) and Neighbourhood/Interpersonal (Mi)

Domains	Sub-domains	Indicators	Remark	Data source
Citizenship rights (Ma)	Constitutional/ political rights	45. Proportion of residents with citizenship	Formal citizenship means the right to carry a passport for the country a person is living in (which should also give them the right to vote in national elections)	??
		46. Proportion having right to vote in local elections and proportion exercising it	both right to vote and voting turn out	??
	Social rights	47. Proportion with right to a public pension (i.e. a pension organised or regulated by the government)	should be the right to a pension as non-receipt may not be due to exclusion	??
		48. Women's pay as a proportion of men's		Eurostat Pega
	Civil rights	49. Proportion with right to free legal advice	a. about the rights b. legal advice = both consultation and representation	??
		50. Proportion experiencing discrimination		discrimination on labour market – OECD/ ILO. Discrimination in general – try to find national data
	Economic and political networks	51. Proportion of <i>ethnic minority groups</i> elected or appointed to parliament, boards of private companies and foundations	ethnicity is not the same as nationality but pertains to 'race'. Therefore each country will have minority ethnic groups with nationality status (and of course migrant groups without such status)	??
		52. Proportion of women elected or appointed to parliament, boards of private companies and foundations		<a href="http://www.db-decision.de">www.db-decision.de</a>
Labour market (Me)	Access to paid employment	53. Long-term unemployment (12+ months)		Eurostat
		54. Involuntary part-time or temporary unemployment		ILO
Services (Me)	Health services	55. Proportions with entitlement to and using public primary health care	a. both: entitlement and actual use i.e. how inclusive is the health care system. b. Ideally the proportions would be ratios of the whole population and then sub-groups: social class, gender, ethnicity	National data
	Housing	56. Proportion homeless, sleeping rough	Estimations	FEANTSA
		57. Average waiting time for social housing		??
	Education	58. school participation rates and higher education participation rates	Suggestions for better measures of inclusiveness in educational system are welcome	??
	Social care	59. Proportion of people in need receiving care services	a. care is defined as assistance in kind by formal agencies to families and individuals as a result of frailty, disability or other need. b. Definition of 'in need' ?	Eurostat/ ECHP
		60. Average waiting time for care services (including child care)		national data
	Financial services	61. Proportion denied credit differentiated by income groups	Access to credit is a major problem for the poor.	
		62. Access to financial assistance / advice in case of need	this would be a qualitative description of national services	National data

			to people who need financial assistance	
	Transport	63. Proportion of population who has access to public transport system		National data
		64. Density of public transport system and road density	Add also road density, otherwise to focussed on public transport only	National data
	Civic / cultural services	65. Number of public sport facilities per 10.000 inhabitants	a. including swimming baths	National data
		66. Number of public and private civic & cultural facilities (e.g. cinema, theatre, concerts) per 10.000 inhabitants		National data
Social networks (MI)	Neighbourhood participation	67. Proportion in regular contact with neighbours		ECHP and Eurostat
	Friendships	68. Proportion in regular contact with friends	Also in cohesion	ECHP (Friends and relatives), EVS (question 6)
	Family life	69. Proportion feeling lonely/isolated		Eurobarometer
		70. Duration of contact with relatives (cohabiting and non-cohabiting)	From a SQ perspective duration (as a proxy for quality) is important. If the data do not exist we should argue for their collection!	Eurostat
		71. Informal (non-monetary) assistance received by different types of family	intended as an inclusion indicator of particular relevance to southern states. Its focus is an inclusion in the family	??

#### 8.4 Social empowerment

Domains	Sub-domains	Indicators	Remark	Data source
Knowledge base	Application of knowledge	72. Extent to which social mobility is knowledge-based (formal qualifications)	Measured by: a. relation between educational level and socio-economic group (based on income). b. adding data to above indicator in relation to socio-economic group of parents	National data
	Availability of information	73. Per cent of population literate and numerate	This indicator stays in this sub-domain.	IALS
		74. availability of free media	this would be a description on national processes regarding the media. For example such as the monopolisation of media in Italy	National data
		75. access to internet	Survey based data: 'can freely make use of internet for personal reasons'	EU survey (ISPO) <a href="http://europa.eu.int/ISPO/esis/default.htm">http://europa.eu.int/ISPO/esis/default.htm</a>
	User friendliness of information	76. provision of information in multiple languages on social services	a. preferably quantitative, but if data is not available mention this and provide some qualitative information. b. use the Social Platform definition of social services (see added document).	National data
77. availability of free advocacy, advice and guidance centres		a. Preferably quantitative, but if data is not available mention this and provide some qualitative information on policy examples on national specific types of free assistance. b. add info on the availability of a translator in court	National data (from welfare associations)	
Labour market	Control over employment contract	78. % of labour force that is member of a trade union (differentiated to public and	a. the term 'labour force' is used to capture both those employed and unemployed	OECD, ILO and national for description of

		private employees)	b. this indicator should be accompanied by a description of the national context including the aspect of the rights to join a trade union. In the Netherlands for example trade union membership is very low, because of tripartite system of consultation and collective agreements of labour contracts	national context
		79. % of labour force covered by a collective agreement (differentiated by public and private employees)	This indicator should be accompanied by a description of the national context about the process of collective agreement. In the Netherlands for example this is by tri-partite agreement (trade union, government and employers' organisation).	National data
	Prospects of job mobility	80. % of employed labour force receiving work based training	If possible we should specify type of training and differentiate between those that enhance skills and those that are part of course e.g. introduction training	National data
		81. % of labour force availing of publicly provided training (not only skills based). (Please outline costs of such training if any)	This could be defined as training provided by the state or a state agency that enhances an individual's employability e.g. general knowledge, computer skills, languages, interview skills, and measures to raise «awareness and self-esteem».	National data
		82. % of labour force participating in any "back to work scheme"	Any scheme provided by the state or a state agency that connects the unemployed with the labour market through work placements, work allowances etc. This could incorporate early school leavers to the long term unemployed.	National data
	Reconciliation of work and family life (work/ life balance)	83. % of organisations operating work life balance policies.	This incorporates policies such as: - reduced working week - term working - alternative working hours - teleworking/ working from home - sabbaticals - job sharing - career breaks	National data
		84. % of employed labour force actually making use of work/life balance measures (see indicator above)	See measured mentioned by indicator above	National data
Openness and supportiveness of institutions	Openness and supportiveness of political system	85. existence of processes of consultation and direct democracy (eg. referenda)	this indicator is a qualitative description of policy change, interesting examples of projects on direct democracy etc.	National data and European Foundation for the Improvement of Working and Living Conditions (Dublin)
	Openness of economic system	86. number of instances of public involvement in major economic decision making (e.g. public hearings about company relocation, inward investment and plant closure)	a. To measure level of community involvement in economic decision making. b. quantitative information is probably difficult to find. This is however seen as an important indicator of social empowerment.	National data
	Openness of organisations	87. % of organisations/ institutions with work councils		European Foundation for the Improvement of Working and Living Conditions (Dublin)
Public space	Support for collective action	88. % of the national & local public budget that is reserved for voluntary, not-for-profit citizenship		National data

		initiatives		
		89. marches and demonstrations banned in the past 12 months as proportion of total marched and demonstrations (held and banned).	Give information about actually held marches and demonstrations and about planned marches and demonstrations that were banned.	National data
	Cultural enrichment	90. Proportion of local and national budget allocated to all cultural activities		National data
		91. Number of self-organised cultural groups and events		National data
		92. proportion of people experiencing different forms of personal enrichment on a regular basis	a. Measured by: average number of attendance of cultural activities (e.g. theatre, ballet, concerts, cinema etc.) each month. b. Survey based information	Maybe Eurostat, national data
Personal relationships	Provision of services supporting physical and social independence	93. percentage of national and local budgets devoted to disabled people (physical and mental)		National data
	Personal support services	94. level of pre-and-post-school child care	a. Measured by: total number of places for children on pre-and post-school child care services (public and private) b. Overlaps with inclusion and socio-economic security	National data
	Support for social interaction	95. extent of inclusiveness of housing and environmental design (e.g. meeting places, lighting, layout)	Measured by: a. average number of meeting places, community centres, etc. per city in relation to population b. extent of consultation of residents by major reforms in housing and environmental design (local and national) (e.g. infrastructural projects, neighbourhood reform projects, housing projects).	National data