European Foundation on Social Quality

European Network on Indicators of Social Quality

Working Paper

Guidelines for national explorations

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Content

Chapter 1: Introduction

1.1   Introduction

This is the second Working Paper of the project on Indicators of Social Quality. The first Working Paper was written as preparation on the second meeting of the Network in February this year[1]. In the first Working Paper several proposals were made about methods of operationalisation of the theory of social quality into indicators. At the second meeting it was decided to follow a method of operationalisation with the components of social quality as starting point. The reasons and consequences of this choice will be stated in section 3.1. In this second Working Paper we elaborate the chosen method and apply it for the operationalisation of the component of socio-economic security. The Working Paper is meant as a first exercise in operationalisation and will function as a basis for a first exploration in the Accession/ Member States about socio-economic security. We need this first exploration to be able to sharpen the theoretical link between the component of socio-economic security and the domains and sub-domains, as will be made clear in chapter three and four.

Before we start the elaboration of the method of operationalisation, we will first describe the objectives and organisation of the project in this chapter and the progress of the project in chapter two for those who are reading this Working Paper but are not yet familiar with the history of this project. An introduction on the social quality approach will be published separately in a document, with which to inform colleagues all over Europe about the essentials of this approach[2]. In section 2.2 this introductory document is shortly introduced. This Working Paper and the separate document about the recent phase of the social quality approach should function as new instruments for the Network and the national reference groups.

1.2   Objectives of the European Network on Indicators of Social Quality

The objectives of the Network are extensively described in the application for this project to the European Commission. In this section we would like to shortly introduce these general, scientific and policy objectives of this Network project on indicators of social quality.

1.2.1   General objective

The research done by the European Foundation on Social Quality in 1998 and 1999 provides the points of departure for the Network. Social quality is a substantive concept, which represents the essence of the social dimension of Europe, but it still requires operationalisation. The concept will provide – with the help of indicators of social quality – new benchmarks for scientists and policy makers by which to assess the impact of socio-economic changes on European citizens. At the same time it will provide mechanisms that enable citizens to be active and responsible participants in this process of change. This endeavour means that the Network focuses on the issue at the heart of the Fifth Framework's key action (the Network is part of this Framework's financial provisions). Namely improving the quality of daily life of citizens in the European Union by renewing knowledge-based public policies to enhance the social dimension of the EU and transcend the recent problems that have caused deficits, inequalities and insecurities.

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[1] Keizer, M. and L.J.G. van der Maesen, *"Working Paper 'from theory to practice'"*, ENIQ document nr.4, Amsterdam, 15 February 2002.
[2] Maesen, van der L.J.G. and A. Walker, *"Social Quality: the theoretical state of affairs"*, Amsterdam, 21 June 2002.

1.2.2   Scientific objectives

The scientific objective of this Network is to build on the Foundation's scientific work and other related projects in the EU in order to construct an index of social quality that can be applied on a regular basis in all Member States and across the EU as a whole. The scientific objective are:
(i) to develop via a process of iteration an agreed set of indicators of social quality.
(ii) to apply these indicators in Member States with help of national reference groups. This will lead to fourteen national reports.
(iii) to develop benchmarks for social quality based upon an interpretation of the obtained comparative empirical data in different Member States.
(iv) to stimulate a multi-disciplinary dialogue on national and EU level about social quality.
(v) to identify the necessary data requirements for a database on social quality.
(vi) to further develop the theory of social quality and compare it to other social research initiatives in Europe, especially to the TSER-Project at Mannheim EUReporting.[3] This important project is focussed on developing an index of individual welfare and Quality of Life for the purpose of general social reporting. Our Network will build on and not replicate this work and, in particular, it will not repeat the excellent general stocktaking exercise on social indicators undertaken by the TSER-Project. The Network will focus on social quality, which means that it has a uniquely different approach from previous work on social indicators.

1.2.3   policy objectives

The Network will endeavour to provide the EU with a new framework (social quality) from which to develop policy at Member State and European level. It will be a framework that creates productive dialogues with citizens. This new approach will assist local, national and European policy makers to develop policies with regard to (i) socio-economic security (ii) political and economic inclusion, (iii) social cohesion, and (iv) citizen empowerment and to assess more effectively the impact of structural changes on the quality of life of citizens. Furthermore, the Network will contribute to the desire of the European Commission to see an aligning of methods, harmonising of procedures and comparison of results with which to develop a common system of reference.

1.3   Organisation of the Network, national reference groups and the staff

In December 2001 the Network's staff sent a draft document about the organisation of the Network project.[4] With this second Working Paper and the document about the theoretical state of affairs of Social Quality[5] we will replace that draft. In the document of December however we published a scheme as an illustration of the relationships between the different actors of this enterprise. This scheme is presented below as figure 1.1 and it will function in this section as frame of reference.

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[3] R. Berger-Schmitt, H-N Noll, *Conceptual Framework and Structure of a European System of Social Indicators* (Mannheim, ZUMA, 2000). * R. Berger-Schmitt, B. Jankowitsche*, Systems of Social Indicators and Social Reporting: The State of the Art* (Mannheim, ZUMA, 1999).
[4] L.J.G. van der Maesen, M. Keizer, A.C.Walker, *'European Network on Indicators of social quality: project summary'*. EFSQ; Amsterdam, December 2001.
[5] See note 1.

Figure 1.1   The actors of the project 'Indicators of Social Quality'

* We call them national reference groups although they are not expected to be representative groups of the country. They are groups formed around and by the participants of the European Network in their own country.

1.3.1   The Network and its staff

The Network will link (or compare) the work conducted on indicators with parallel research by other scientists studying social indicators. For example: (i) scientists oriented to the Human Development Index, the GVP per Capita Approach, and income comparisons; (ii) the quality logic analyses, for example Total Quality Management; (iii) the essence of recent European social policy referring, for example, to the paradigm of social policy as a productive factor, monitoring of codes of conduct social labels, and poverty indicators. In this Paper's chapter six the staff published its preliminary ideas with regard to the comparison between the social quality approach and other approaches. It is especially

the tasks of the Network's staff to develop this comparison, because the outcomes will deliver the Network's indispensable frame of reference.

The **staff** consist of; Margo Keizer as scientific manager (80%), and Joyce Hamilton as scientific assistant (80%). A senior advisor will assist the staff. Till January 2002 Wolfgang Beck functioned as such. Laurent van der Maesen functions as co-ordinator and Alan Walker as chair of the Network and its staff. Except for the research concerning the similarities and differences of other approaches, the staff's main task is to assist the Network, to develop forms of co-operation with the assistants of the participants of the Network and to co-ordinate the work of the national reference groups.

The **Network**'s participants, and see figure 1.1, will manage the process of developing and applying the indicators according to the proposed procedure. They will meet each other once a year and discuss the documents of the staff.[6] Furthermore, they will be responsible for the production of national reports. In November 2002 they will present a draft of the national report on socio-economic security in accordance with the decisions made during the second meeting and the proposals in this second Working Paper (see also chapter five). In September 2003 they will present the final national report, in accordance with the decisions to be made during the third meeting. For preparing the national reports (the draft and the final one) these participants will be assisted by an assistant (40%). These assistants will be engaged for three years. Next to the participants also the staff of the Network will be responsible for the co-operation with these assistants and for providing them with the necessary background information in order to contribute to this production.

1.3.2   The national reference groups

National reference groups are proposed as part of this European Network project because the Network itself is operating at a European level. The results of the thinking at European level should be confronted with the thinking at national level. The national (or even regional) differences should be considered when thinking on an European level. The work of the Network should be criticised on national level. This critical national input can sharpen the thinking at European level, within the Network.

The national reference groups will preferably consist of a combination of scientists, policy makers and other research users, like for instance members of NGO's interested in issues related to social quality. Especially a representative of national organisations connected with the European Anti Poverty Network, as well as a representative of national organisations connected with the International Council on Social Welfare should be invited to co-operate with the national reference groups. Both the European Anti Poverty Network and the International Council function as participants of the Network as well. They can assist these representatives. In figure 1.1 this is illustrated as well. The Poverty Network and the International Council play a special role in the Network. They will comment on the nature of the national reports and the Network reports from their specific point of view and experiences. This can be done on the European level, namely in the Network, as well as on national level, namely in the national reference groups. The assistants will underpin this process.

We have to make two remarks about the nature of the national reference groups. First, we do not mean groups, representing something national. We mean a group, composed and working in one of the Member States. The adjective "national" is related to the European dimension of the Network. In other words, for example a group connected with the participants of Nantes is called the French national reference group of the Network. Second, the members of these national reference groups do not have to function as concrete 'group members'. They will be invited to reflect upon the work done by the Network and to advice the assistants of the Network's participants by the preparation of the national reports (the drafts and the final version accordant to the decisions of the Network). A condition is however that these group 'members' have to take on board the social quality approach and to reflect upon differences with other approaches as presented in chapter six. They can give

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[6] In the first twelve months they will meet each other twice in order to start up the project.

advice by looking for relevant existing data. Furthermore, they can assist the reflection on the outcomes of the Network (with regard to the European level) from the perspective of national circumstances. This will be important for the final national reports. They are part of the comparative research aspect of this project.

Another role of the national reference groups is to assist by the preparation of a multi-disciplinary dialogue on social quality and the indicators, with which to explore and understand the domains of the components. This will facilitate a common understanding of changes taking place in the welfare systems and an assessment of their consequences for social quality. These national reference groups may be enabled to stimulate a coherent and consistent discourse on the applicability of the proposed indicators to different regions and communities with which to reflect geographical, political, economic, social and cultural diversity. As the European Commission says, Europe's scientific fabric lacks cohesion. Although they are being narrowed down, the differences of development between European regions in terms of the production of scientific knowledge are still appreciable.

In figure 1.1 one can see, that the national reference groups are located around the European Network. The Network's participants will co-ordinate their national reference groups. But the national reference groups will provide the Network with country specific information about indicators and national social indicators' research and their results. So the national reference groups are standing between the Network at the one side and the 'daily life of citizens' on the other side.

1.4   Co-operation with the Dublin Foundation

We are seeking ways to collaborate with the European Foundation on Improvement of Living and Working Conditions in Dublin. Thanks to the increase of its budget compared with previous years, the Living Conditions Unit will present a tool for monitoring living conditions and quality of life across the European Union. A first report on the subject will be published toward the end of this year, and a database of key sources of information will be made available. The Network may use this database of the Dublin Foundation for its project on indicators of social quality. A higher evidenced based theory on social quality may assist the Dublin Foundation with a theoretical underpinning of its proposed comprehensive approach, understanding the nature and changes of the quality of Living as well as Working conditions. From the side of the Dublin Foundation experts are participating in the projects of the Amsterdam Foundation.

Chapter 2: Project's progress

2.1   Project's progress

First of all the scope of the work of the European Network on Indicators of Social Quality was defined. To measure social quality the theory defines three important measurement instruments; indicators, profiles and criteria[7]. These were described in the *General Paper*[8] that was written as preparation for the first plenary meeting of the Network in October 2001 and was based on chapter seventeen and eighteen of the second book on social quality "Social Quality: A Vision for Europe" as well as on several scientific articles with primarily ideas about indicators for social quality. This General Paper was discussed during the *first meeting* of the participants of the Network from 25 – 27 October 2001. During this meeting the participants had a first common analytical discussion about the concept of social quality. This discussion delivered new input for the development of the concept and for defining the scope of the work of the Network. The results of this meeting were published in the *Notes of the first meeting*.

Because profiles and criteria are not yet existing measurement instruments in scientific research, new research work has to be done. The Network decided during its first meeting that a special research team should be established for this research work. To set up this research team a *Proposal* was send to the European Commission in January 2002[9]. The thinking about this research work further clarified the task of the Network. It was decided that the Network itself would focus solely on indicators. This means that the task of the Network will be to develop a method to chose indicators that are relevant for social quality. Thereafter relevant indicators of social quality will be chosen from the bulk of existing social indicators. The Network will however not only regard existing indicators, because most probably relevant indicators for social quality are not yet existing and should be developed in the near future. Hence the contacts with the Dublin Foundation.

Secondly, by defining the scope of the project the task of the participants of the Network was clarified. Along this also the task of the assistants was clarified and the role of the national reference groups as described in the previous chapter. The Network participants have appointed assistants and started the formation of these national reference groups in their particular country. In the Annex of this Working Paper a list of participants, assistants and members of the national reference groups so far is presented.

Thirdly, the Network discussed the method to chose relevant indicators of social quality during the second meeting. The staff did some preparatory proposals in the first *Working Paper.* With writing this paper the staff used the practical experience with defining indicators for flexicurity in the project 'Social Quality and Employment policies' financed by DG Employment. During the *second meeting* of the Network from 21 – 22 February 2002, the Network applied a common search process in order to decide about a method to operationalise and define indicators for social quality. The Network decided to start from the theory of social quality which consists of four components (socio-economic security, inclusion, cohesion and empowerment). A start is made with the operationalisation of the component of socio-economic security. Thanks to this start in the second meeting a proposal could be made by the staff and sent to the participants of the Network about potential relevant social quality indicators for socio-economic security. This proposal on indicators of socio-economic security was debated electronically. In this second Working Paper the method for operationalisation is elaborated in chapter

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[7] See Maesen, van der L.J.G. and A. Walker, *"Social Quality: the theoretical state of affairs"*, Amsterdam, 21 June 2002, p. 14.
[8] Beck, W., M. Keizer, L.J.G. van der Maesen and D. Phillips, *"General Paper on behalf of the first plenary meeting of the Network 'Indicators of Social Quality'"*, Amsterdam, October 2001.
[9] This Proposal was called *"Research Group on Indicators, Profiles and Criteria for Social Quality"* and was sent in January to DG XII within the Fifth Framework Programme, Improving the Socio-economic Knowledge Base. Unfortunately, this Proposal was declared not eligible, due to one missing form, that was not reprinted by the copy-machine and a fax that lost its way between Amsterdam and Brussels. We came back on the formation of a research group within the Expression of Interest for the Sixth Framework Programme of DG Research.

three and a new proposal for domains, sub-domains and indicators of socio-economic security is presented in chapter four.

Fourthly, a start is made with the comparison of social quality and other social indicator movements. In the General Paper social quality was compared to Quality of Life and Quality of Society movements. This comparison was further elaborated in the Annex of the first Working Paper and chapter six of this second Working Paper. The comparison of social quality with other social movements in Europe will be an ongoing task of the Network along with the work on social quality indicators.

List of the projects documents:
- Wolfgang Beck, Laurent J.G. van der Maesen, Margo Keizer and David Phillips (2001), *"General Paper on behalf of the first plenary meeting of the Network 'Indicators Social Quality'"*, Amsterdam, 25-27 October 2001.
- Laurent J.G. van der Maesen, Margo Keizer and Alan Walker (2001), *"Project summary. Draft"*, Amsterdam, 20th December 2001.
- Margo Keizer (2002), *"Notes of the first meeting"*, Amsterdam, 21st January 2002.
- European Foundation on Social Quality (2002), *Proposal to DG XII: Research Group Indicators, Profiles and Criteria of Social Quality (RISQ)*, Amsterdam, 14th January 2002.
- Laurent J.G. van der Maesen and Margo Keizer (2002), *"Working Paper. From theory to practice"*, Amsterdam 15th February 2002.
- Wolfgang Beck and Margo Keizer (2002), *"Annex Working Paper: Differences between social quality and other concepts"*, Amsterdam, 15th February 2002.
- Margo Keizer (2002), *"Minutes of the second meeting"*, Amsterdam, 14th March 2002.
- Laurent J.G. van der Maesen and Alan Walker (2002), *"Proposed list of sub-domains and indicators for the social quality component of socio-economic security"*, Amsterdam, 27th March 2002.
- Margo Keizer (2002), *"Periodic Progress Report (first six months)"*, Amsterdam, 16th May 2002.

2.2   The theoretical state of affairs of social quality

With this Working Paper also the draft of "Social Quality: Theoretical State of Affairs" is sent around as was asked for by the participants of the Network[10]. This paper can be used as introduction on social quality by the members of the national reference groups. It gives a short summary of the nature of this initiative, the actual state of the basic principles of the theory of social quality, the dialogue with the European Commission and the recent research strategies. It will be explained that social quality is developed to serve as foundation of different policies and to help to integrate those policies, rather than to isolate them from each other as is currently the case. Furthermore one of the fundamentals of social quality is that people are seen as social beings who realise themselves through interaction with others, individuals or collectivities. Social quality tries to integrate the human needs with collective actors and policies in order to reach a society of greater social quality. How this theory tries to do so and what theoretical problems the theory still has to solve, will be explained in this introduction on the theoretical state of affairs of social quality. These theoretical problems will be encountered in this Working Paper as well (see chapter three). Thanks to this Network project on indicators we discover those theoretical problems and will be enabled to solve them.

2.3   About this second Working Paper

The main purpose of this second Working Paper is to present a method for operationalising the theory of social quality into indicators and to start this operationalisation for one of the components of social quality, namely socio-economic security. This second Working Paper builds on the work of the General Paper, the first Working Paper, the second meeting of the Network and the electronic debate on indicators for socio-economic security.

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[10]See note 1.

The next chapter presents the method of operationalisation of social quality into indicators. In the second meeting of the Network is decided to start this operationalisation with the theory of social quality as starting point. In the first section of this chapter will be reflected on this starting point in contrast to the other possible starting points presented in the previous Working Paper. When this choice is clarified, the actual method for operationalisation is described in the section 3.2. This method is based on four steps: from the component of social quality to domains to sub-domains to indicators. These steps are guided by selection criteria. Also some conditions for the indicators itself are proposed. Because the subject matters of the components of social quality are still underdeveloped the connection between the components of social quality and the choice of domains and sub-domains is still difficult. An empirical exploration of socio-economic security is proposed to gain insight in societal processes with regard to socio-economic security. This iterative process between theoretical and empirical phases can be seen as a tool for the development of the theory and the subject matters of the components (see section 3.2.2).

In chapter four the proposed method is applied for the development of indicators for the component of socio-economic security. In the second meeting of the Network an intuitive start is made with choosing domains and sub-domains for this component. During this exercise it was already made clear that the subject matter of socio-economic security is not fully explicated. Based on the first input of the meeting the staff sent around a proposed list of indicators for socio-economic security. The participants of the Network commented on this list by e-mail. Based on this input a new and more developed proposal is made in chapter four of this Working Paper for domains, sub-domains and indicators of socio-economic security. But in this exercise the problems with regard to the method will be demonstrated as well.

The empirical exploration for the development of socio-economic security indicators in the Accession/ Member States resulting in draft national reports is described in chapter five. In this chapter the work of the Network participants and the staff for the coming months and the accompanying timetable is outlined, together with a proposal for the content of the draft national reports that will be discussed in the third meeting of the Network in November of this year.

In the last chapter a further step is taken in the comparison of the social quality approach with other social welfare approaches like the Quality of Life and Quality of Society approaches. Thanks to comments from our German participants we could rewrite partly the comparison made in the previous Working Paper. This work will be carried on.

Chapter 3: Method for developing indicators

3.1 Social quality as starting point

Social quality is the starting point for the operationalisation of the theory into indicators. In the previous Working Paper different proposals were presented for the operationalisation of social quality into indicators:

1. proposal of Svetlik: he proposed to first develop definitions of the components.
2. proposal of Berman and Phillips: they suggested to start from the components of social quality and develop input, process, output and impact indicators.
3. proposal in chapter XVIII of second SQ book: this proposal also started from the components, by first theorising the nature, mutual relationship and common dialectic of the components.
4. proposal by the employment project of the EFSQ: they used a concrete policy field (employment) as point of departure.

Two proposals or routes for operationalisation were discussed extensively during the second meeting, namely the policy route and the social quality route. The policy route is explained in the previous Working Paper and relates to the Employment project of the EFSQ (see point 4 above). The proposal is an empirical approach, because it takes different policy fields as point of departure. It combines both an inductive and deductive way of reasoning. The idea is to start with an inductive, empirical examination of policy fields, namely from policy fields to policy area to domains, targets and finally to indicators. As soon as we have gained more insight in the components of social quality by examining the policy fields, we will start a deductive way of reasoning in our choice of relevant domains and indicators of social quality. This means that Social Quality comes in at the moment we have to make decisions about relevant domains and targets for social quality. A problem with this procedure is the relationship with the way of thinking of policy-makers. The employment project followed the definitions and sub-policy fields developed by European policy-makers. The idea is that this procedure will be used the coming year for 2 or 3 policy fields in order to get to know more about the components.

The other proposal, the social quality route, takes as starting points the components of social quality (socio-economic security, cohesion, inclusion and empowerment). This means that it is not depending on EC policies. Although this proposal also starts from the components of social quality, it differs from the proposals of Svetlik, Phillips/ Berman and chapter XVIII of the second SQ book in the working paper. The difference with Svetlik and chapter XVIII of the second book is that this proposal doesn't start with an elaborate description of the components. The difference with Phillips/ Berman is that this project should concentrate only on output indicators and that sub-domains will be defined between the domains and the indicators.

Some advantages and disadvantages of the two discussed proposals can be distinguished. The disadvantages of the policy route are (1) first, as said before, that policy fields and domains are defined by EC thinking. (2) With operationalising social quality we should instead examine EC policy from a social quality point of view and not incorporate EC thinking, (3) if we only work with existing policies, we can't examine what kind of policy is missing with regard to social quality. It narrows the scope of research. (4) Next to missing policy, we will loose a lot of aspects of society, which are important seen from a social quality point of view. We should make the invisible events in society visible. The problem of loneliness for example is very relevant for social quality. In contrary to these disadvantages of the policy route, the advantages of the social quality route are that (a) this route the starting point of this project, namely social quality, follows and (b) that thanks to the social quality approach a broader view on policy development is offered. We can also examine not existing policies which are probably important with regard to social quality. It will be clear that the social quality route will be followed in the operationalisation of social quality. The social quality theory and its four components will be the starting point for defining indicators.

The important question is how to decide which domains, sub-domains and indicators are relevant for social quality. Where do the essential characteristics of social quality come in? And how do indicators of social quality differ from indicators of other social indicator movements in Europe? In the following section a start will be made with answering these questions.

3.2 The "four steps"-method

As the theory of social quality is our starting point for the development of indicators of social quality the essentials and basic assumptions of the theory underlie the choice of indicators. These basic assumptions are (i) humans are social-beings, (ii) the 'social' is expressed in the dialectic between self-realisation and the formation of collective identities, (iii) the methodological triangle forms the point of departure for operationalising social quality[11]. As explained in our methodological triangle the objective conditional factors of social quality will be operationalised as indicators. These objective conditional factors are connected with four components of social quality. For defining indicators of social quality we therefore take these components as a starting point. Yet the components of the social quality quadrant are still broad topics. Defining indicators directly with the components as starting point is too big a step. We need smaller entities to be able to choose and define indicators which are relevant for social quality as well as for the components. A funnel-method is proposed as method to break down the components into smaller entities. Thanks to some criteria we can try to narrow down the scope of research. In our funnel we will have four steps, namely (i) the components of social quality, (ii) the domains of the components, (iii) the sub-domains and (iv) the indicators. In this section we will describe what choices should be made at each step and with what criteria we can try to make these choices. With each step one criterion will be dominant, but this does not mean that the other criteria are of no importance. Another important element in our method is that choices made with regard to domains, sub-domains and indicators should sustain and supplement each other.

3.2.1 First step: the components

We will start the operationalisation of social quality with the objective conditional factors, in other words with the components of social quality. These components are:
- people have to have access to *socio-economic security* – whether from employment, social security, health care or other sources – in order to protect them from poverty and other forms of material as well as immaterial deprivation and to assure circumstances necessary for a dignified life,
- people must experience *inclusion* in, or minimum levels of exclusion from, key political, social and economic institutions such as the labour market, political systems and community organisations in order to realise their potentials,
- people should be able to live in communities and societies characterised by a sufficient level of *cohesion* as condition for collectively accepted values and norms which are indispensable for their social existence,
- people must be *empowered* in order to be able to fully participate, especially in the face of rapid socio-economic change. Empowerment means enabling people to control their own lives and to take advantage of opportunities.

We have to define and elaborate the subject matter of these components with regard to social quality. Especially the social quality dialectic between self-realisation and the formation of collective identities plays a crucial role in the elaboration of the subject matter of the components. In what way is this dialectic expressed in socio-economic security, cohesion, inclusion and empowerment from a social quality point of view? And also, what policy fields are of importance for the four different components? A first step in explicating these questions is made in chapter seventeen and eighteen of the second book of social quality[12].
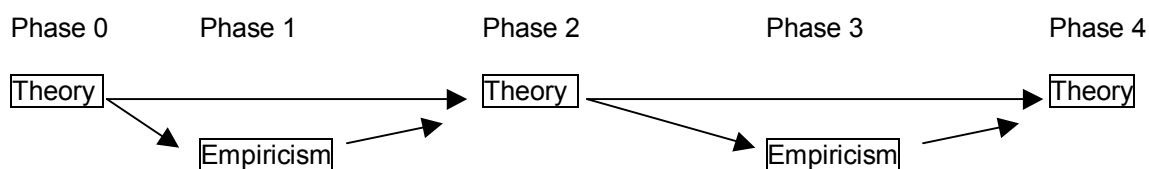
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[11] See Maesen, van der L.J.G. and A. Walker, *"Social Quality: the theoretical state of affairs"*, Amsterdam, 21 June 2002.
[12] W.A. Beck, L.J.G. van der Maesen, F. Thomése, A.C. Walker (eds), *'Social Quality: A Vision for Europe'.* The Hague, London/Boston: Kluwer Law International, 2001.

3.2.2   Side step: an iterative process

At this point in our method of operationalisation we should make an important remark and a further explanation of the method we propose to follow. This method is part of an iterative process. As you can see in figure 3.1 we started the operationalisation of social quality in phase zero. This phase is the point in the theory of social quality the Foundation has reached at this moment. To further develop the theory we will need input from an empirical exploration in the different Member States and Accession States. An exploration of the diversity in the different countries will help to specify the theory and it will also help to encompass and integrate this diversity into the theory. We need a first empirical phase in our method to develop the theory in phase two (and so on). This alternation of theory and empiricism is the iterative process the Foundation is following to develop the theory of social quality.

Figure 3.1   Iterative process

Phase 0	Phase 1	Phase 2	Phase 3	Phase 4

It will be clear that we reached the point in the development of the theory of social quality to operationalise the components. We already faced a problem while defining domains of the component of socio-economic security. The question is how do we theoretically define the subject matter of the components with regard to social quality? Göran Therborn mentioned this conceptual problem with regard to the component of socio-economic security (see Minutes page 7). In chapter seventeen of the second book a start is made with the definition of the subject matter of the components. To be able to elaborate and refine these definitions we need phase one: empiricism. An empirical exploration with the aim to get more insight and grip on the theoretical side. Especially the diversity in the different Member/ Accession States will help us in finding the most important societal questions with regard to the four components. This exploration will lead us to define in an accurate way the subject matter of the components in phase two. The advantage of this iterative process for developing a theory is that by regularly empirical input the theorizing stays close to reality. In this way the theory will not only be developed from behind a bureau, but will have its feet into society.

3.2.3   Second step: the domains

With the subject matter of the component in mind we can choose domains concerning this subject matter of the component. The question is what domains in society[13] like for instance labour, financial, social and environmental resources are of importance for the subject matter of the different components of social quality? This could mean that some of these domains in society will be important in more than one component, but that different aspects of these domains will be explored with regard to the subject matter of the components. The second step in our method (after elaborating the subject matter of the component) is defining/ choosing domains of the component. The criterion for this choice is the importance of the domain for the subject matter of the component of social quality.

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[13] These domains in society are called 'Life Domains' by Regina Berger-Schmitt and Heinz-Herbert Noll in their Conceptual Framework and Structure of a European System of Social Indicators, EuReporting Working Paper No. 9.

> **Criterion 1** *component criterion*: the chosen domain should be of importance for the subject matter of the component.

As we said in section 3.3.2 the determination of the subject matter of the components of social quality is an iterative process. At phase zero in this process (see figure 3.1) we can formulate an initial subject matter of the components, but after the first empirical exploration we will be able to refine the definition of the subject matter. This redefinition could probably also lead to the choice of other domains of the components.

3.2.4   Third step: the sub-domains

After we have defined the domains we can make our third step in the operationalisation towards indicators. This step will be the choice of sub-domains. Because also the domains are still quite broad entities, we would like to refine them further and break them down into sub-domains that reflect on the main dialectic of social quality. With this step in our method we bring in the basic assumptions of social quality, namely the dialectic of social quality that plays a role in every component: the dialectic between individual self-realisation and the formation of collective identities. This means that as a social being an individual can only realise itself within the social constitution of collective identities. The individual is not operating in a vacuum but is influenced by others within the social collectivities (as family, school, working environment) it is surrounded by. The other way around, the collective identities are constantly influenced by the individuals who try to develop themselves within these historically constituted collective identities. This creates the dialectic between self-realisation and collective identities. Within the domain we can define aspects (called sub-domains) that reflect this dialectic. Especially those sub-domains that reflect this dialectic should be chosen in our operationalisation of social quality into indicators. For the choice of sub-domains we have the authentic social quality dialectic as dominant criterion. This comes on top of the first criterion explained in the previous step. Also the sub-domains should be important for the subject matter of the components.

> **Criterion 2** *authentic social quality criterion*: the chosen sub-domains should explicitly demonstrate the basic dialectic of social quality.

The choice of sub-domains should not only catch the essence of social quality but should also deliver new insights in actual processes and developments in daily life. The study of social quality should not focus on research done by other research institutes for many times, but should try to add some aspects of daily life that are not often combined in social research. Only in this way social quality can have additional value in the world of social sciences. This means that we should not focus on for instance social benefit systems, but rather on the actual outcomes and consequences of these social benefit systems for different groups in society. Being sensitive towards current developments in society keeps the social quality theory dynamic. When operationalising social quality in fifty years, other choices could be made because of changing developments in society. This third criterion is equally important as the second criterion when choosing sub-domains.

> **Criterion 3** *latest developments criterion*: the chosen sub-domains deliver relevant new insight in actual processes and developments in daily life. They should have added value to existing social research.

3.2.5 Fourth step: the indicators

After we have decided about the sub-domains, we can make our last step towards indicators. For choosing these indicators again criterion three is very important. A presentation of existing (and probably new) data in a new and different context and in connection with each other may deliver original information. We would like to focus on a combination of processes in daily life which have hardly been combined in research before. Next to an original combination of indicators, the aspect of mutual sustainability is important. The chosen indicators should sustain and supplement each other. So the originality and additional value of indicators of social quality lies in the presentation and combination of existing (and probably some new) indicators and data and in the interpretation thereof from a social quality point of view.

3.2.6 Additional conditions for indicators

For the choice of indicators we have some additional functional conditions or principles. These were suggested in the second meeting of the Network and mentioned by Bea Cantillon and Liv Passot in their contribution to the electronic debate. These conditions or principles are that the indicators should:
1. identify the essence of the problem and have a clear normative interpretation,
2. meet consensus and be statistically reliable over time,
3. be responsive to policy interventions,
4. be comparable across Member States (meet international standards).

Next to these overall conditions for indicators, we have to make some important choices with regard to the type of indicators we would like to gather. These choices are:
a. input, process or output indicators or all of them?
b. objective or subjective indicators?
c. focus on region, nations or European level?
d. household or individual level?

We will explain these conditions and try to answer the questions about the choices below.

First, *an indicator should identify the essence of the problem and have a clear and accepted normative interpretation*. Of each sub-domain we should identify the most essential problem with regard to the component and the social quality dialectic and try to find an indicator that is able to capture that problem in an acceptable way. Moreover, the indicators should have a clear normative interpretation. There should be general agreement that a movement in a particular direction represents an improvement. This will be a very difficult condition and we should keep in mind what is known thanks to other social research about correlations between policy and outcomes of policy. For example, research in a number of welfare states has found no correlation between health budgets and the health situation of the population. Furthermore, a high degree of 'flexibility of working time' can also be considered both a good and a bad thing, as Denis and Charles pointed out. In the context of the 'activation' of the Welfare State ('making work pay'), a large number of provisions for people without regular paid employment can be viewed as worsening unemployment traps.

The second condition is that *an indicator should meet consensus and be statistically validated.* An indicator should be measurable in a way that commands general support. A preliminary condition to achieve a large extent of consensus as to how to measure a specific problem, is the existence of a lot of methodological studies on that problem. This is definitely the case for income poverty measurement. Thanks to the numerous studies devoted to that theme, a consensus could emerge on what is the best

manner to measure poverty. An indicator must also be statistically reliable over time in the sense that results must not be liable to unpredictable or inexplicable fluctuations. Finally, throughout the analysis, we have to bear in mind that the circumstances of those suffering social disadvantage are among the most difficult to measure statistically.

The third condition is that *an indicator should be responsive to policy interventions*. Indicators must reflect the intervention of policy. Moreover, the indicators must be of a form that can be linked to policy initiatives. This does not mean that we should limit ourselves to existing policies. The aim of social quality is also to appoint fields in society where policy is needed. Therefore indicators must be of a form that can be linked to policy non-initiatives. At the same time, the indicators should not be easily manipulable. There should be no temptation to Member States to improve their score by artificial policy changes.
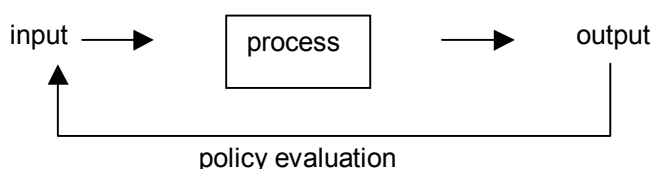
The fourth condition is that *an indicator should be comparable across Member States, and comparable as far as practicable with the standards applied internationally by Eurostat, UN, OECD and ILO*. Full comparability is an ideal that cannot normally be attained, since, even where data are harmonised across Member States, variations in institutional and social structure mean that there may be differences in the interpretation of the data. However supra-national research institutes like Eurostat, OECD and ILO have made a lot of effort to make data more comparable. Some indicators are more sensitive than others to differences across Member States in their social structure. In order to reach an acceptable level of comparability, we should avoid indicators that are over-sensitive to these structural differences.

We will now address the questions of choices about the sort of indicators of social quality:
   a.   input, process or output indicators or all of them?
   b.   objective or subjective indicators?
   c.   focus on region, nations or European level?
   d.   household or individual level?

(a) We should decide to measure input, process or output indicators or all of them. The theory of social quality is especially focussing on societal processes. We would like to evaluate actual processes and circumstances in daily life. Therefore we should consider actual circumstances and not the policy input by policy-makers to influence these actual processes and circumstances. We should for example not incorporate indicators about budgets spend on specific policies, but evaluate the results of these policies. Budgets can be spend very inefficient, so what conclusions can one derive from input indicators as budgets. Furthermore our Network undertaking is not a policy evaluation of a concrete policy initiative of policy-makers (see figure 3.2). For a policy evaluation one should incorporate input, process and output indicators. We are looking for indicators that indicate the state of social quality in actual societies. Especially output indicators indicating the actual state of affairs in society give information about where policy making is necessary and indicate if societal processes deliver qualitative sufficient results. Therefore we can, in our opinion, initially limit ourselves by concentrating on output indicators. The output indicators deliver insight in societal trends and developments.

Figure 3.2   Policy-making process

(b) We have to decide about concentrating on objective or subjective indicators. We propose to mainly focus on objective indicators. Taking in mind the methodological triangle of social quality, we see that the indicators are part of the objective conditional factors and that profiles are part of the subjective

conditional factors. This means that with regard to indicators we can concentrate mainly on objective indicators, because the subjective feeling of citizens will be measured with regard to profiles.

(c) Do we focus on regional, national or European level? We already more or less made a decision about this, because of the national reports that will be written by the participants of the Network. So this means that we will initially focus on nations (Member States and Candidate Member States). This does not mean that we should close our eyes for the differences between regions within nations. If there are important differences within the nations between regions which make that the national indicators give a wrong view of the actual situation, these should be mentioned in the national report. So while our initial focus will be on national states, this does not mean that we should refrain from looking into regional differences.

(d) Our last decision concerns the household or individual level. In view of the vast amount of research on the topic about the maldistribution of resources within households (particularly between men and women) the individual is the obvious unit unless such information is either not available or not relevant in specific cases. This means also that it will be relevant to make a distinction between men and women in our data, of course again unless such information is either not available or not relevant in specific cases.
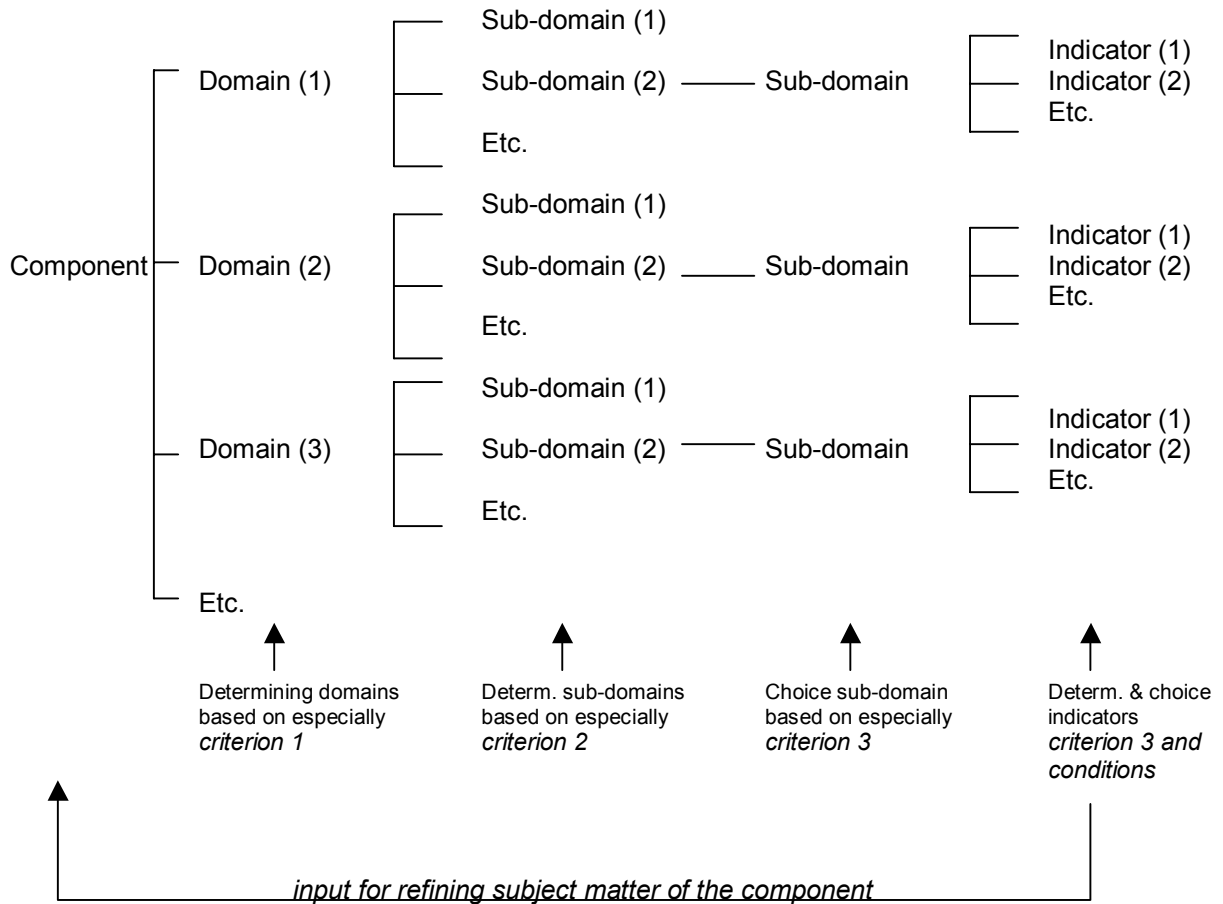

Overall conditions for indicators
1. identify the essence of the problem and have a clear normative interpretation,
2. meet consensus and statistically validated,
3. responsive to policy interventions,
4. comparable (rely especially on Eurostat or other supra-national indicators/ data OECD, EC etc),
5. output indicators,
6. objective indicators,
7. national level,
8. individual level (distinction in data between men and women).

3.3   Concluding

In this chapter we have explained our method to operationalise indicators of social quality. We have taken four steps, the first step is defining the subject matter of the component, the second is from component to domains, the third from domains to sub-domains and the last step is from sub-domains to indicators. These steps are guided by criteria, the component criterion, the authentic social quality criterion, the latest developments criterion and we formulated some conditions the indicators should meet. In section 3.3.2 we made a side step to explain the iterative process we are following. At the moment we are working in phase zero, working with a not yet completely elaborated theory of social quality. This means that the subject matter of the components with regard to social quality (step one of the method of operationalisation) is still underdeveloped. We explained that we need input from an empirical exploration throughout Europe to be able to fully elaborate the subject matter of the components (this will be phase one of the iterative process). After this initial exploration we will be able to elaborate and refine the subject matter of the components (phase two of the iterative process). This iterative process has some consequences for the method of operationalisation of social quality into indicators. It means that as well the initial choice of domains as the initial choice of sub-domains and indicators could change after the phase of empirical exploration and the renewed theoretical analyses about the components.

In figure 3.3 we have demonstrated in short our method of operationalisation. This method can be placed in the theoretical phases of the iterative process.

Figure 3.3   Method for operationalisation

In the next chapter we will have to deal with the underdevelopment of the social quality theory. In that chapter we start our operationalisation of the component of socio-economic security. We will define initial domains and sub-domains for this component although the subject matter of socio-economic security from a social quality point of view is not yet completely clear. This first operationalisation of the component of socio-economic security will therefore have to be regarded as an exploration. The first Member State reports will deliver inputs for a theoretical analysis of socio-economic security from a social quality point of view. After this theoretical analysis we will have a better conceptual link between the component, its domains and sub-domains. This will probably lead to a renewed approach for the component of socio-economic security.

Chapter 4: Domains & sub-domains of socio-economic security

4.1   Introduction

In the previous chapter we explained that the subject matters of the components are still underdeveloped. This does not mean that nothing can be said about the essence of the component of socio-economic security that is subject of this chapter. We start this chapter with a description of socio-economic security from a social quality point of view. Key-aspects of socio-economic security are avoiding risks and promoting life chances. The description delivers a starting point for the operationalisation of socio-economic security, however it is still insufficient for a theoretical funding of the choice of domains and sub-domains. After the initial exploration of socio-economic security in the Accession/ Member States we hopefully will be able to define the subject matter of socio-economic security and can give the choice of domains, sub-domains and indicators a better theoretical foundation.

4.2   Component of socio-economic security

Why do we operationalise the component of socio-economic security first? As said before, people have to have access to socio-economic security – whether from employment, social security, health care or other sources – in order to protect them from poverty and other forms of material as well as immaterial deprivation and to assure circumstances necessary for a dignified life. Therefore socio-economic security can be seen as the most primary objective conditional factor. A lot of aspects of life are affected by socio-economic security. Socio-economic security has many connections with the other three components. For example with regard to the component of inclusion there is the connection that citizens should be included in the domains to guarantee their socio-economic security (for example the labour market and social institutions). There is a connection with the component of empowerment in a sense of chances with regard to socio-economic security and taking advantage of opportunities (empowerment).
Another argument for starting with this component is a strategic one. With the enlargement of the European Union at hand there will be a growing difference between the Member States with regard to socio-economic security. We should for example be aware of the differences between the social systems and the social safety nets between the Accession and Member States. With regard to social quality the enlargement should not only be an economic project. Socio-economic security in the Accession States is very important for the success of the enlargement of the EU. We would like to be able to illustrate the differences and follow the enlargement process critically.

What is the subject matter of the component of socio-economic security? We will define the subject matter of the component based on the theoretical knowledge we have so far. After our empirical exploration we will probably be able to be more specific about the components nature. Socio-economic security has two aspects. First, the central focus is to cope with people's social risks; it concerns all mechanisms with which to guarantee the primary existential security of citizens (for instance income and social protection), basic security of daily life (for instance food safety, environmental issues and safety at work), and the area of internal freedom, security and justice. The second aspect concerns people's life chances. In the creation of real life chances individuals depend on the world of institutions, their norms, forms of standardisation and regimes. Its mission is to enlarge the realm of options between which people can choose. Social risks and life chances refer to different theoretical schemes. With regard to social risks the discussions and research about social inequality provide the most well-known point of orientation. With regard to the aspect of life chances the notions of welfare pluralism, third sector organisations and the enabling state are important topics. How the discussions about social risks and life chances can be connected will have to be elaborated to achieve a better understanding of the concept of socio-economic security. The component of socio-economic security is a much more complex and more extensive concept than social security. The latter is

characterized by top-down approaches and interpretations. In contrast socio-economic security responds to new social relations, production systems and conditions as the consequences of processes of modernization with active citizens, productive communities, configurations and groups. The social quality dialectic of self-realisation and the formation of collective identities is expressed in the two aspects (social risks and life chances) of socio-economic security. With self-realisation people can try to avoid social risks and create new life chances, and within the formation of collective identities these risks could be diminished and the chances could be sustained in a collective way. This connection between the subject matter of socio-economic security and the social quality dialectic will have to be further explored theoretically. Nevertheless these two aspects, social risks and life chances, should be recognisable in the choice of domains, sub-domains and indicators of socio-economic security.

4.3   Domains

In this section we will try to elucidate the choice of domains for socio-economic security. This means that we should try to answer the question why these domains are of importance for the subject matter of the component socio-economic security seen from a social quality point of view. For answering this question especially criterion one (the component criterion) will be applied. As avoiding social risks and enhancing life chances form the heart of the matter of socio-economic security these two aspect should be recognisable in the choice of domains. The chosen domains for socio-economic security, based on intuitive reasoning during the second meeting of the Network, are labour, physical environment, financial resources, social resources, public goods and modern public health [ed.: we changed the names of the domains somewhat].

The first domain, *labour*, is chosen for obvious reasons, as it can be seen as a means to generating resources. Having a job enables one to earn a living. As Alan Walker already put it: 'As European welfare states were founded on the assumption of 'full' employment, employment is crucial to the social quality of people's lives. There is a clear link between employment and inclusion and, conversely, unemployment and exclusion.'[14] Thus a job helps to avoid social risks and delivers the resources for buying primary existential security. The definition of labour however from the social quality point of view is not just limited to the employment contract in a labour and product market of buyers and sellers. Current policies isolate themselves with this restricted view from two crucial spheres of human activity or labour: both the wider, non-money economy or voluntary work, and the economy of care work[15]. From a social quality point of view, we should also focus on the non-paid side of labour; labour that does not deliver the essentials for a living, but that nevertheless is very important for society. Thus we should not strictly be speaking about employment, but about the broader term of labour.

Second, the domain of *physical environment* is part of socio-economic security because the physical conditions of humans is essential in avoiding social risks and enhancing life chances. The physical environment is part of the basic security of daily life. With physical environment we mean the physical living conditions or circumstances of people. Aspects of physical environment are for example safety, living circumstances as neighbourhood conditions and housing facilities or mobility. The addition of physical environment with regard to indicators of socio-economic security is an original one, because living circumstances are not often connected with socio-economic security in social science. Within the socio-economic security scientists usually focus on purely socio-economic aspects like income and social welfare.

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[14] A.C. Walker, 'The Social Quality of Employment: Europe needs a social policy for work', in: *European Journal of Social Quality*, 2000, Vol. 2, issue 2, p.3.
[15] Monica Threlfall, *"For EFSQ: Notes on the question of unpaid work"* (2002). Monica Threlfall was member of the research project of the EFSQ about employment policies and social quality. She wrote an paper about the role of unpaid work with regard to social quality.

Third, the domain of *financial resources* is connected to socio-economic security because income (income from for instance labour, benefits, assets or insurances) is a primary existential security of citizens. Having sufficient financial resources furthermore enhances life chances and the other way around, not having enough financial resources decreases life chances. Here the same argumentation is valid as for the domain of labour. Yet financial resources are not only generated by income through labour. Other aspects of financial resources are for example savings (and its opponent indebtedness), insurances, benefits, state aid, stock exchanges, access to credits or pension systems.

Fourth, *social resources* are seen as part of socio-economic security, because being able to fall back on social ties like family, friends and relationships helps guaranteeing primary existential security and creates opportunities for taking risks in the hope to enhance life chances. Aspects of these social resources next to family, friends and relationships are charity (or unpaid work, which is also seen as part of the domain of labour), local networks, clientalism and trust. This domain has a strong connection with the social quality approach in which the individual is seen as a social being. Especially this domain forms a connection between the other three components of social quality; inclusion, cohesion and empowerment. In each component social relations form the heart of the matter. In this component we should keep in mind to focus on the socio-economic security side of social ties.

The fifth and last domain of socio-economic security is called *health*. The concept of health changed in 1987 from a state of absence of disease to the physical and mental ability of subjects to develop and maintain a satisfactory life in relation to relevant, positive living conditions.[16] Van der Maesen and Nijhuis argue in line with Len Doyal and Ian Gough that health is one of the basic personal human needs. It is primarily an attribute of individual subjects. In the conceptualisation of public health, public is synonymous with larger social configurations (communities) of subjects that interact. In the context of modern public health, the focus should be on the social quality of living conditions, circumstances and systems, including care systems. Social quality aspects of health care systems are for example, socially equitable distribution of services, their availability, accessibility and their capacity for empowerment. Modern public health presents three strategies: (1) improving social conditions that stimulate health, (2) preventing social conditions that threaten health, and (3) neutralising existing social conditions that cause ill health. In this sense the modern public health can easily be connected with the concept of socio-economic security. The three strategies of modern public health contribute to avoid risks with regard to health and better strategies provide chances.

The sixth domain of socio-economic security is *public goods*. Public goods are provisions or services that the government mostly takes care of or are placed under strict supervision of the government and that are meant for all citizens. We can think of infrastructure, public transport, water, electricity and gas, schools/ education, fire brigade, police and recreation facilities etc. This is part of socio-economic security because of its connection with basic security of daily life. It is also part of socio-economic security because good provisions enhance life chances and avoid risks. The choice of this domain reflects the changes in actual processes of daily life with regard to the third sector. With regard to the domain of physical environment we had an important discussion about neighbourhood facilities like e.g. public transport, recreation facilities and schools. These public facilities are in our opinion part of the domain of public goods of society.

4.4   Sub-domains

Thanks to the reflection on the domains in the previous section we can now decide about sub-domains. These sub-domains form the intervening step between the larger entity of the domain and the concrete specification of an indicator. By deciding about these sub-domains a strong link should be made with the theory of social quality, namely through the dialectic of self-realisation and the formation of collective identities. With the choice of domains the connection is made with the

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[16] Van der Maesen and Nijhuis (2000), "Continuing the debate on the philosophy of modern public health: social quality as a point of reference". In: *Journal of Epidemiology and Community Health*, Vol. 54, No 2, February 2000, BMJ Publishing Group, London.

component of socio-economic security. With this step from domain to sub-domain we concentrate on the connection with criteria two (authentic social quality criterion) and three (latest developments criterion), as described in chapter one.

Labour
For this domain a lot of different sub-domains are mentioned in the employment project of the EFSQ for DG V, the second meeting of the Network and the electronic discussion afterwards. The sub-domains mentioned are for examples working time, income security, forms of leave, employment relations, access to labour, quality of work, safety at work and unpaid work. In our first proposal of 27 March 2002, we proposed the sub-domain of working time. Yet after evaluating the comments and rethinking the domain of labour and the research method we now propose the sub-domains of ***forms of leave and unpaid work***.

Why do we prefer the sub-domains of forms of leave and voluntary work? Forms of leave are important for the flexibility of an employee to realise him/herself in a different way than through paid work. Within this sub-domain the dialectic between self-realisation and collective identities is clear: if there is no flexibility in working schemes or if there is no financial security for taking leave we may notice two consequences. The (i) self-realisation in daily circumstances may be blocked completely. The role and confrontation (ii) in the formation of collective identities (with regard to families, to circles of friends and communities) will be frustrated seriously. Otherwise, in positive sense it delivers points of departure for the unfolding of this dialectic in an accepted way. Also forms of leave without losing income or job supply the employee with socio-economic security.

As we described in the section about the domain labour, we prefer a broad definition of labour. This means that the sub-domains mentioned are not enough to cover the domain of labour. Next to paid labour, also unpaid work should be seen as part of this domain. Unpaid work will therefore be added as a sub-domain of labour. A lot of important work is done without an employment relation or payment. This can be important voluntary work, but also care work for children or elderly, sick or disabled. Also this work enables people to realize themselves for example within family relations or within voluntary work. Furthermore this work is of high value for society and the formation of collective identities. With social quality in mind we can not omit this important aspect of labour. Labour that is not paid for, but where society can not do without. Furthermore there is a strong connection between the discussions about unpaid work and the aspect of forms of leave. The two sub-domains of labour are in this way supplementary.

Physical environment
Also for this domain several sub-domains are mentioned, for example safety, housing, urban surrounding, the neighbourhood and mobility. In our previous proposal we suggested the sub-domain of safety. In the electronic comments there was a strong plea for the sub-domain of housing as well. We propose to examine the sub-domains of ***personal safety and living circumstances***. With living circumstances we mean the way people are living. This can be with house or without house and it can also tell something about the quality of houses people are living in.

Actual personal safety and safety feelings are essential ingredients for the social quality of citizens. A serious lack of safety (on the street, in primary and secondary social relations) will cause (i) fear and immense stress which undermines an acceptable process of self-realisation. Furthermore, it will cause (ii) a decline of confidence of collective identities with which to unfold one's talents, capabilities etc. New social and economic relations in suburban quarters and recent questions of multicultural processes demonstrate the necessity to take on board this topic for analysing the nature of social quality in modern living conditions of millions of people. In many Member States the question of insecurity is becoming one of the most important policy items. See for example Jan Berting's chapter in the Foundation's second book (the case of France)[17]; Wilhelm Heytmeijer's analyses in Germany

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[17] Berting J. and C. Villain-Gandossi, "Urban Transformations, The French Debate and Social Quality". In: W.A. Beck, L.J.G. van der Maesen, F. Thomése, A.C.Walker (eds), '*Social Quality: A Vision for Europe*'. The Hague, London/Boston: Kluwer Law International, 2001, p.173-197.

with regard of splitting of communities in urban circumstances and most clearly, see the discussions in the whole western world since September the eleventh.

The argument of new social and economic relations in urban quarters also underlines the reason for taking the sub-domain of living circumstances into account in the domain of physical environment. In the electronic debate a comment was made that housing and housing policies are highly complex fields of research and difficult to compare between European countries. For example with regard to the aspect of ownership, government policies vary significantly throughout Europe. We would like to focus on the actual living circumstances of citizens in stead of those housing policies. This means that we can regard housing and non-housing, or homelessness. Also indicators with regard to the quality of houses are interesting when looking at living circumstances. Having a good and safe place to stay is very important for self-realisation. In some countries people without an address are not entitled to any form of state aid or benefit. This of course blocks self-realisation. And on the other hand people living in bad circumstances will not be interested or feel invited to contribute to the formation of collective identities.

Financial resources
As sub-domains of financial resources are mentioned income, pensions, social benefits, access to credits, savings/ indebtedness and alternative markets. Especially ***income support and personal debts*** can be seen as relevant sub-domains with regard to social quality. In our initial proposal we proposed the sub-domain of pension systems, but this seems to be a too complex field of research. Pension systems differ very much in Europe and conclusions based on two or three indicators are highly unrealistic for such complex systems. The idea of alternative market is attractive, but reliable data are difficult to find and compare.

We propose to focus on income support, with which we mean support by the government when people are unable to earn a living on their own due to a handicap, disease or unemployment. This does not mean that we propose to compare social welfare or benefit systems. A lot of research has been done to compare these. We rather would like to regard how many people are depending on support by the government, which part of their income is depending on this support and for how long they are depending on support. Income support helps people through a period in their lives in which they can not earn a decent living on their own. So it helps people to realise themselves even in difficult times. But when depending on income support too long can block self-realisation, because of the risks of falling into a poverty trap.

The income support together with information on personal debts of households gives insight in the financial security of citizens. Having debts can be seen as financial risky and increasing insecurity. For people with high debts it will be less easy to realise themselves, because all they earn will be first used to solve their debts. Income is the most important resource for primary existential security. Without this security people would be less eager to participate in society.

Social resources
As described above, the domain of social resources is a crucial one. In our initial proposal the sub-domain of family relations was mentioned. We now propose to split this sub-domain in two sub-domains, ***family composition and family support***. Other sub-domains mentioned are charity, local networks, clientalism and trust. For all these sub-domains it is argued that they are difficult to operationalise into indicators and that reliable data are difficult to find.

Up till now family was the most essential support of social life, preventing risks, creating material and immaterial well being and sources for the self-realisation of people. A drastic change of family composition during the last few decennia, like the increase of divorces, of single parent families and millions of children in Europe living below acceptable levels of material well being, urges for ideas and policies for creating positive conditions for alternative relationships. Negative family circumstances are especially blocking (i) possibilities for self-realisation of children and cause a diminishing of affection. They will prevent (ii) their role and confrontation with the formation of collective identities because of

the lack of recognition. In positive sense family may function especially as a source of self-realisation and the herewith-related positive input concerning the formation of collective identities.

Especially the diminishing of mutual care because of new family compositions and growing mobility demands new solutions on family support like how to care for young and old people. The position of older women e.g. is changing dramatically with forms of complete isolation[18]. With the sub-domain of family support a cross examination is possible with the sub-domain of forms of leave and care of the domain of labour.

With regard to indicators for this sub-domain we should keep in mind to focus on the socio-economic security aspects of social resources and family composition and support. The connection with the sub-domain of forms of care and leave in the domain of labour is therefore essential. The central question is how family composition and support influence the possibilities to earn a living. In the component of inclusion and/ or cohesion other aspects of changing family relationships, growing number of divorces, living near kin and time to spend with children will be regarded.

Health

The three strategies of modern public health as presented above, were: (1) improving social conditions that stimulate health, (2) preventing social conditions that threaten health, and (3) neutralising existing social conditions that cause ill health. With this in mind we propose the sub-domains of ***health care facilities and physical health.***

Health care facilities can be connected with strategy two and three of modern public health, namely preventing social conditions that threaten health and neutralising existing social conditions that cause ill health. With good health care facilities nearby and good information about health, people will quicker go to a doctor or make inquiries about their health. This will keep citizens healthy and promote self-realisation. Without a good facilities of health care we may suppose the increase of the duration of sickness, which (i) cause a degradation of the subject's self-realisation. Furthermore, it causes (ii) an increase of incapability with regard to the formation of collective identities. In other words, an individual can not take part in societal processes when it is suffering a disease. When ill one can neither realise oneself nor participate in the formation of collective identities.

Physical health can be connected with strategy one and two of modern public health, namely improving social conditions that stimulate health and preventing social conditions that threaten health. A physical good health prevents illness. A physical good health can be reach in an active way by improving social conditions that stimulates health, like sports for example, and it can also be gained by preventing social conditions that threaten health like for example addiction.

Public goods

In the first proposal the sub-domain of civil rights was proposed. In many comments of the participants of the Network questions were posed with regard to this sub-domain, on the actual meaning of - either civil rights or social rights - and on how to operationalise these rights into indicators. Therefore we had to rethink this domain (see above). With regard to the domain of physical environment we had an important discussion about neighbourhood facilities like e.g. public transport, recreation facilities and schools. These public facilities are part of the public goods of society. We propose to take ***infrastructure and education*** as sub-domains of public goods.

The quality of the infrastructure is important for the mobility of citizens. The desire for mobility is growing. People are less and less working and living in the same city. For being able to reach work and home, infrastructure like roads and public transport are more and more important. This implies that the claims of citizens on infrastructure is growing. With regard to social quality, mobility can be

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[18] See Leonardi O. de, "Social Market, Social Quality and the Quality of Social Institutions". In: W.A. Beck, L.J.G. van der Maesen, F. Thomése, A.C.Walker (eds), '*Social Quality: A Vision for Europe'*. The Hague, London/Boston: Kluwer Law International, 2001, p.199-212.
And Yeandle S., "Social Quality in Everyday Life: Changing European Experiences of Employment, Family and Community". In: *The European Journal of Social Quality*, Volume 1, Issue 1 & 2, Berghahn Journals, New York/ Oxford, 1999.

seen as a means of citizens to realise themselves and this growing wish for mobility reflects collective identities.

There is a direct link between education and income security. People with less education most often have a lower standard of income. With regard to the social quality dialectic, education is an important means of realising oneself and in schools the collective identities of society are educated. In this way schooling contributes to the formation of collective identities.

4.5   Indicators

Of each sub-domain two indicators will be proposed. These are presented in the figure 4.1 and elucidated underneath. Of each indictor data should be found that distinguish between age and sex.

Figure 4.1   Domains, sub-domains and indicators of socio-economic security

Domains	Sub-domains	Indicators
labour	1. forms of leave and care 2. unpaid work	Ad 1. - use made of different forms of leave by type of contract - replacement rates of benefits when on care leave Ad 2. - time spend on care for children, elderly or disabled - time spend on voluntary work
physical environment	3. personal safety 4. living circumstance	Ad 3. - accidents/ mortality at work (ILO) - hospitalisation due to accidents per 1000 children (age 0-14) Ad 4. - number of homeless - quality of housing
financial resources	5. income support 6. personal debts	Ad 5. - percentage of households dependent on income support - income composition and percentage of the income thanks to government aid - duration per household of income support Ad 6. - debts per household - support to bankrupt citizens/ individuals
social resources	7. family composition 8. family support	Ad 7. - number of single parent families - percentage of close living kin/ family Ad 8. - percentage of children in day care by age - percentage of elderly in elderly homes

Health	11. health care facilities 12. physical health	Ad 11. - number of clients per general practitioner - physical distance to health care facilities Ad 12. - sport facilities - percentage of addiction
public goods	9. infrastructure 10. education	Ad 9. - number of public transport facilities per square kilometre - road density Ad 10. - percentage of illiteracy - percentage of children in school by age (till the age of 18)

Form of leave and care
For this sub-domain it is of importance to look into whether people make use of different forms of leave depending on their age, gender and sort of contract. The other proposed indicator is the replacement rates, because this indicates the level of security. If replacements rates are low, people will be less inclined to make use of leave opportunities.

Unpaid work
With regard to the sub-domain of unpaid work we propose to look at time spent on different forms of unpaid work, like care and voluntary work. Time spent on unpaid work can of course not be used for doing paid work and enhancing financial security. There is a clear link with the indicators of forms of leave, as these provisions affect the time available for doing other things like e.g. paid work.

With these indicators we think we can show the differences between Member States and the actual trends with regard to the thinking about labour policies at the moment throughout Europe. These indicators express the growing concern about care and the changing attitude with regard to the single-earner model.

Personal safety
The sub-domain of personal safety is expressed by the indicators accidents at work and hospitalisation of children. Being injured or killed at work is clearly an indicator of low social quality in different respects. Relevant here is that doing unsafe work increases the risk of loosing income, thus socio-economic security, and becoming dependent on others' (both material and immaterial) support and/or care. This also accounts for the hospitalisation of children although seen in a more long term perspective. Living in unsafe circumstances as a child increases the risk of not obtaining as much income and/or becoming more dependent on care of others in a later phase in life.

Living circumstances
The worst living circumstances can be expressed by the people who have no place to stay, the homeless. With regard to social quality this group is of important, because social quality tries to direct the attention of policy-makers to places where policy is needed. The homeless are often a forgotten group, while problems with for instance debts, addiction and mental illness manifest themselves clearly. In the Netherlands for example the number of mentally ill homeless is growing fast. The other aspect of living circumstances is the quality of housing. The quality of housing influences the personal well-being and health. Therefore it affects whether you can obtain an income and take care of yourself and / or relatives, thus gain socio-economic security.

Personal safety and living circumstances expressed in the proposed indicators reflect important aspects of the physical environment citizens are living in.

Income support
As said in the previous section we propose to concentrate on the number of people depending on support by the government, which part of their income is depending on this support and for how long they are depending on support. This combination of three indicators illustrate best the dependence on income support.

Personal debts
Together with the level of debts per household and the percentage of individual citizens in need of support because of bankruptcy, we can gain insight in the financial resources or problems of citizens and if new policy is needed.

Family composition
The way families are composed, is changing rapidly. Less and less families consist of the standard composition of man, wife and their children. We can for example recognise a growing number of single parent families. And also the distance between family members is growing.

Family support
With regard to family support we would like to concentrate on the aspect of care that is not delivered by family members, but by professionals. These indicators should be combined with the four indicators of the domain labour, because those indicators indicate the opportunities for giving care and the time spend on care by family members.

Infrastructure
As said before, there is growing demand for mobility by citizens. Citizens are depending on government investment in infrastructure for their mobility. The infrastructure is operationalised in indicators for public transport and one for the facilities for private transport, namely the road net.

Education
The level of illiteracy in society reflects the level of education and how much people are enabled to create circumstances for improving their individual well-being. As the strong correlation between level of education and level of income proves, illiterate people will have more problems in earning a sufficient level of income. Illiterate people are therefore very vulnerable for low socio-economic security. The percentage of children in school reflects the period children receive a basic education. The same argumentation as for illiteracy is valid for the level of basic education of children.

Health care facilities
Health care is most directly provided by the general practitioner. The general practitioner is the first doctor a citizen is depending on when he/she is ill. Therefore the number of general practitioners is important fro a good access to health care. We operationalised this by the number of clients per G.P. An other aspect of health care facilities is the distance to these facilities. Going to a doctor is easier when the doctor is nearby. And in the case of accidents quick help can safe lives. The health infrastructure is of course highly dependent on government policy.

Physical health
Personal physical health is directly of influence on being able to gain a living. One can actively work on physical health by doing sports. Facilities for sport are therefore important as stimulation. The opposite of physical health is for instance addiction. Policy is needed to keep people away from addiction and if addicted they need care.

Chapter 5: Exploration of socio-economic security indicators in the Member States

5.1   Introduction

What are the tasks of the Network in the coming months? The Network participants and their assistants can start the writing of their national report on socio-economic security, based on the proposals of the previous chapter (section 5.2). The staff will continue the theoretical work on the subject matters of the components, the comparison of social quality with other social indicators movements and assist the assistants and national reference groups (section 5.3).

5.2   Task of the Network in the near future and the national reports

5.2.1   The Network

Based on the proposal of chapter four, the participants and assistants of the Network can start an exploration of socio-economic security indicators, data and policies in their country. This will be an initial exploration with as aim to gather information about socio-economic security in the different Accession/ Member States. If we have this first overview we can start the clarification of the subject matter of socio-economic security and sharpen our definition and connection with the social quality approach.

The staff would like to ask you to not only gather information about the proposed list in chapter four, but to be as well critical to the proposals and add national specific insights and information. We should be aware of regional and national differences and of policies strategies of the government in the respective participant countries with regard to socio-economic security. This does not mean that we have to be exhaustive, but especially trends and developments are interesting. It should be seen as a first search process in order to come to the heart of the matter of socio-economic security in Europe from a social quality point of view.

The ideas for this search process is to start with the proposed list in chapter four and fill in the gaps from your country specific or scientific discipline point of view, explore the data available and policies developed. In the section below we did a proposal for the structure of the national reports. Before starting the writing of the national report, one can consult the members of the national reference groups about the proposals in chapter four of this Working Paper. Of course also the draft report can be sent to the national reference group members for further comments and additions. The staff will also try to organise a meeting for the assistants in Amsterdam at the end of September (see section 5.3). At this meeting the assistant can give an presentation of their draft national report on socio-economic security. In this meeting these first results can be discussed and after the meeting the assistants can if necessary rewrite parts of their national report, before sending a 'definitive' national report to the staff in Amsterdam at 18 October as preparation on the third meeting of the Network participants in November (7th and 8th).

We suggest the following timetable:

15 July:	Receipt of Working Paper 2 "Guidelines for national explorations on socio-economic security"
15 July – 20 September:	Exploration and consultation of national reference groups about the proposed list of indicators

20 September:	Sending first draft of national report to Amsterdam as preparation on the meeting of the assistants
25 – 27 September:	Meeting of assistants and discussion of draft national reports
27 September – 18 October:	Rewriting draft national reports based on comments of the meeting of assistants and further comments of the national reference groups
18 October:	Sending national report on socio-economic security to staff as preparation on the third meeting of the Network
7 – 8 November:	Third meeting of the Network

5.2.2   The national reports

The following objectives were formulated in our application with regard to the benefit of social quality indicators:
- to develop and apply specific indicators of social quality in each Member State so as to reflect the complex economic, social, political and cultural differences between them.
- to create new reference points for policy makers to compare responses to structural change within and between Member States.

In the national reports we would like to meet these objectives.

The following hand-out is intended as guidelines for the preparation of the national reports. We think a length of about 20-25 pages.

Tasks for National Teams

1. Assessing the first draft
Critically assess the draft sub-domains and indicators of socio-economic security from a national perspective by your own analysis and experience, comparison with other research in your country and by engaging your national group in an electronic dialogue.

2. Constructing a state-of-the-art list
Propose alternative sub-domains and indicators bearing in mind our agreement to create an 'ideal' list of a limited number of indicators. Your national groups may be asked, for example, what are the five best/most sensitive sub-domains and indicators.

3. Variations
Propose specific indicators to reflect regional and cultural variations in experience within your country that are not reflected in the draft list of sub-domains/indicators.

4. What information is available?
Based on the secondary analysis of existing data in your country illustrate the availability of indicators and data on socio-economic security and what additional data collection would be necessary to deliver 2. above.

5. The policy dimension
Provide examples of national or local policy action necessary to lead to a significant improvement in socio-economic security.

Contents of National Reports

5.3   Tasks of the staff

While the participants of the Network work on the national reports, the staff will work on the organisation of the project and the theoretical aspects mentioned in this Working Paper. First of all, the staff will assist the assistants with the formation of national reference groups and the first exploration of socio-economic security when necessary. Secondly, the staff will work on the organisation of a meeting in Amsterdam in September with the assistants to discuss the first results of the exploration. Thirdly, the third meeting of the participants in November will be prepared. Fourthly, the staff will try to solve the theoretical problems in chapter three and four. This means a study will be made of the subject matters of the components of social quality; socio-economic security, cohesion, inclusion and empowerment. Fifthly, the staff will work with experts round the Network on a comparison between the social quality approach and other social movements in Europe. This means an elaboration of chapter six of this Working Paper. Sixthly, maybe a kind of division of tasks between the participants of the Network and their national reference groups can be made. Of course this depends on the will and choices of the participants. As we are cooperating with the German group on the comparison between social quality and Quality of Life, we can probably find other expertise on particular subjects with other participants. The staff therefore invites the participants to come with suggestions about their subject of expertise to elaborate from a social quality point of view.

Chapter 6: First debate of Social Quality and Quality of Life

In this chapter we will make a start with the articulation of differences between the measurement instruments developed by European research institutes and the measurement instruments the European Foundation on Social Quality will develop. This comparison will be an ongoing aspect of research in our project on the development of indicators of social quality. Important preparatory work for this comparison has been done by researchers of the ZUMA Institute in Mannheim. They analysed all existing welfare concepts to develop an European System of Social Indicators. They classified the existing welfare concepts in two umbrella constructs, namely 'Quality of Life' and 'Quality of Society.' The researchers of the ZUMA Institute also located the social quality approach and placed it under the 'Quality of Society' construct. For this chapter we used their analysis for a comparison between social quality and Quality of Life and Quality of Society concepts. We will first of all present a summary of the analysis of the researchers of ZUMA with which to explain both constructs. With this in mind we shall comment on the interpretation of the social quality approach. After this general introduction we will go on with our interpretation of differences between existing welfare approaches and the social quality approach with regard to (i) the theoretical dimension, (ii) the analytical dimension, and (iii) the policy dimension of this development.

6.1   Quality of Life and Quality of Society approach

The literature on measurement and monitoring of the level of well-being of European citizens is strongly connected with concepts of welfare. In this context, the construction of *Quality of Life* is the most embraced, the broadest constructed and the best operationalised framework at the moment. According to Heinz-Herbert Noll, it was born as an "alternative to the more and more questionable concept of the affluent society and became the new, but also much more complex and multi-dimensional goal of social development."[19] The idea of wealth as the one and only goal of societal development was replaced or extended by the multidimensional concept of quality of life which includes material dimensions of welfare as well as immaterial aspects of the living situation like health, social relations or the quality of natural environment. Furthermore, quality of life was considered to nclude objective features – the actual conditions – as well as the subjective well-being of the individual citizens based on subjective perceptions and evaluations of living conditions. The construction of Quality of Life is based upon an interdisciplinary approach: historians, economists, sociologists, philosophers, psychologists, scientist of medicine. They address in their own way the question: what constitutes a good life or a good society? Different notions, corresponding with different concepts of welfare are meanwhile in discussion. Noll makes a general distinction between the *Quality of Life*[20] and *Quality of Societies.* A characteristic of the *Quality of Life* construction is its focus on individual subjects. Dimensions of welfare related to society are rather neglected. In contrast to this, *Quality of Societies* focus on the distribution of welfare and social relations within societies. Within the framework of the latter construct, some of these theoretical approaches are quite comprehensive. According to Noll, some examples are Human Development, Liveability, Sustainability or Social Quality[21]. Other propositions focus on more special welfare issues as for example social exclusion, social capital or social cohesion.[22] In figure 6.1 we show the way Noll has ordered the welfare concepts. According to Noll, there is a substantial overlap between the concepts, presented in this figure. This overlap, and particularly the relationship between the new concepts under the umbrella 'Quality of Society' and

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[19] H.H. Noll, *"Social Indicators and Social Reporting: The International Experience"*. Canadian Council on Social Development (ed.): Symposium on Measuring Well-Being and Social Indicators. Final Report, Ottawa, 1996.
See also: H.H. Noll, *"Konzepte der Wohlfahrtsentwicklung: Lebensqualität und ´neue´Wohlfahrtskonzepte"*, EuReporting Working Paper No.3, ZUMA, Mannheim 1999/ R.Berger-Schmitt, B. Jankowitsch, *"Systems of Social Indicators and Social Reporting: The State of the Art"*, EuReporting Working Paper No.1, ZUMA, Mannheim, 1999.
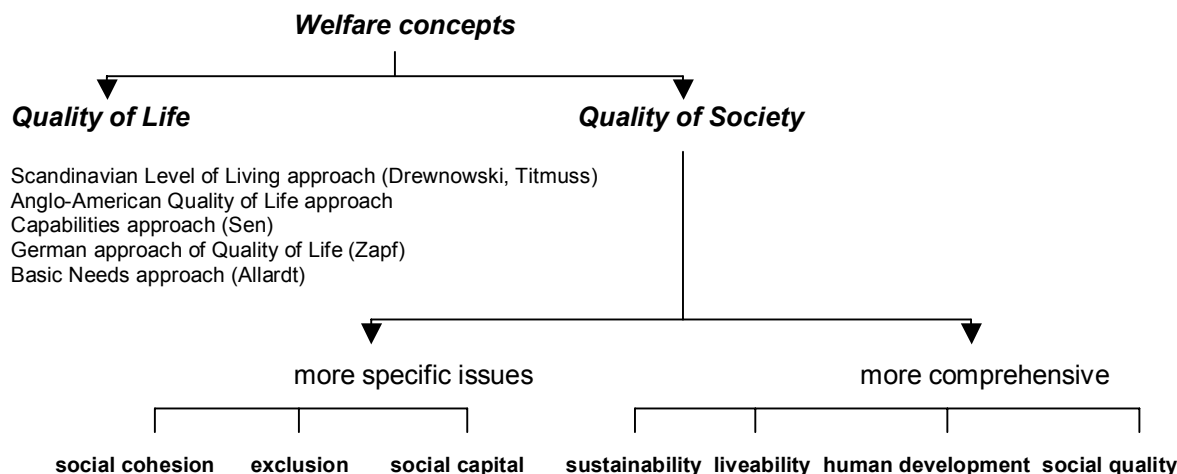
[20] For example: Scandinavian Level of Living Approach, American Quality of Life Approach, the Euromodule approach.

[21] According to Noll, Social Quality should be placed under the more comprehensive concepts of Quality of Society.

[22] H.H. Noll, *"The European System of Social indicators: An Instrument for Social Monitoring and Reporting"*, ZUMA, Mannheim, 2000, p.2-12.

'Quality of Life', has not been clarified. According to Noll, this is also true for the concept of social quality.

Figure 6.1   The welfare concepts ordered according to ZUMA

Welfare concepts

Quality of Life   *Quality of Society*

Scandinavian Level of Living approach (Drewnowski, Titmuss)
Anglo-American Quality of Life approach
Capabilities approach (Sen)
German approach of Quality of Life (Zapf)
Basic Needs approach (Allardt)

more specific issues   more comprehensive

social cohesion   exclusion   social capital   sustainability liveability human development social quality
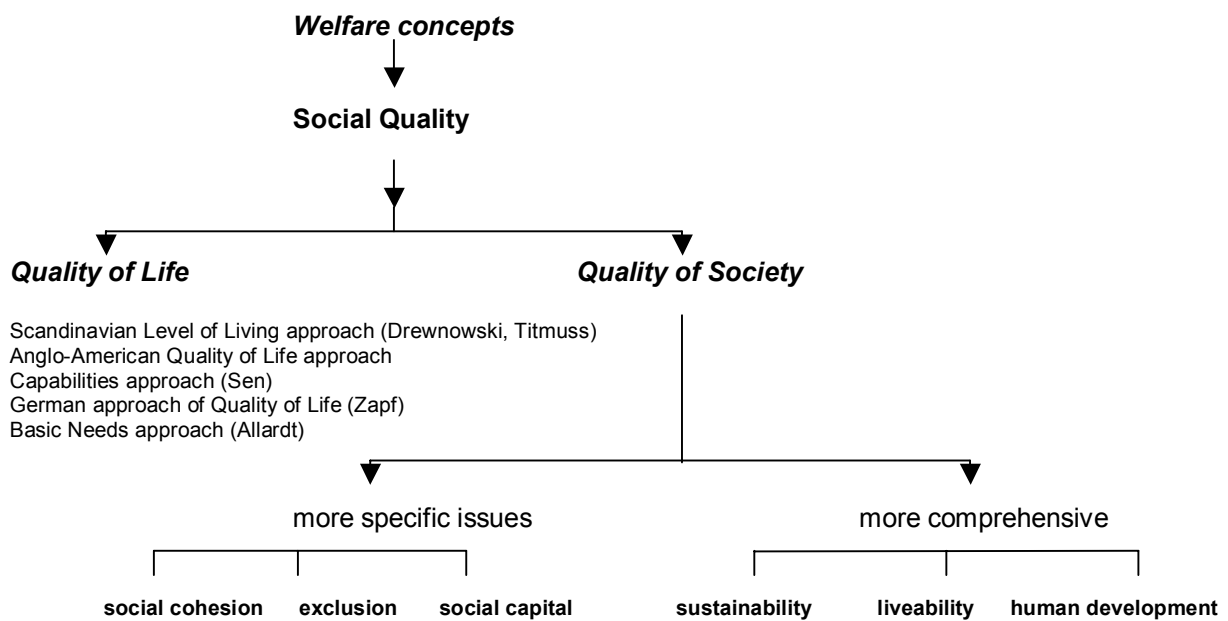
Noll based his conclusion about the positioning of social quality in his overview of welfare concepts on the Foundation's first book, published in 1997. At that time the concept of social quality was underdeveloped. Thanks to studies, workshops and debates since 1997, the Foundation published its second book in the beginning van 2001 in order to further develop the theoretical dimension of the social quality approach. With reference to the second book we may conclude, that 'social quality' may be appreciated as an umbrella construct as well. It is comparable with the 'Quality of Life' and the 'Quality of Society' constructs. All of them regard interdisciplinary approaches. Each approach refers to other scientific highlights, stresses different components and reflects on other relationships between the various dimensions of welfare in order to address the question: "what constitutes a good life or a good society?" Practically, each concept is a ´amalgam´ of different theoretical components; a construction based on different scientific traditions and focussing on objective living conditions as well as subjective well-being. In other words, 'Social Quality' should be seen as a construct as well. The different welfare concepts such as cohesion, inclusion and also human development (in the Social Quality approach this is called empowerment) are part of the 'Social Quality' construct. Another concept of Social Quality is socio-economic security. These four concepts (in the Social Quality theory they are called components) are logically connected to each other, thanks to the dialectic between self-realisation of individual subjects as social beings and the formation of collective identities. This theoretical assumption determines the essence of these four components. Therefore, in the 'Social Quality' construct these concepts are related intrinsically in a theoretical way. This makes this construct attractive, because it tries to formulate a comprehensive understanding of different concepts.

We even would like to argue that social quality should not be seen as an example of a comprehensive concept of Quality of Society, but that it should be seen as an umbrella concept of the Quality of Life and Quality of Society approaches. Social quality can be seen as the umbrella of Quality of Life and Quality of Society, because it incorporates as well individual characteristics as societal characteristics of the respective welfare concepts. As said above, social quality tries to connect the different welfare concepts thanks to the social quality dialectic between self-realisation of individual subjects as social beings and the formation of collective identities. The individual and societal characteristics form the ends of this dialectic. The individual characteristics can be found in the aspect of self-realisation and the societal characteristics (distributional and relational aspects) can be found in the formation of collective identities. According to the social quality theory this dialectic plays a role in all social quality

components. We can not evaluate welfare from only an individualistic or only an societal point of view. Especially with regard to welfare the interaction between society and the individual is of utmost importance. This tension between the individual and the society can also be found in the social quality quadrants of the objective and subjective factors. In these quadrants the welfare concepts or social quality components are ordered along two axes; one axes is formed by the tension between societal and biographical (individual) development, the other axes is formed by the tension between at the one hand systems, institutions and organisations and at the other hand communities, configurations and groups. For these reasons the European Foundation on Social Quality proposes the following ordering of welfare concepts (see figure 6.2).

Figure 6.2   The welfare concepts ordered according to the EFSQ

6.2   Differences between social quality and other welfare concepts

In this section we will compare the social quality approach and other approaches with regard to three dimensions: the scientific, the analytical or methodological and the political dimension. For this comparison the Foundation's second book functions as point of departure.

6.2.1   The scientific dimension

In contrast to the construct of 'Social Quality', the 'Quality of Life' and 'Quality of Society' refer to the quality of a given society. Measuring both material and immaterial, objective and subjective, individual and collective aspects of welfare, means measuring the existing living conditions and the subjective perceived well-being of citizens. Continuous observation of society and monitoring of social change is the aim of the different concepts, based on accurate analyses of the objective situation of individuals and their subjective interpretation. The complementary nature of both analyses forms the methodological starting point for comprehensive frameworks as for example the Euromodule. This is more than analysing political opinions or a covering of indicators of selected life domains as done by

Eurobarometer, World Value Survey, the European Community Household Panel. The ultimate function of the systems of social reporting and welfare measurement concerns, in the words of Terry Ward: "Good indicators direct policy makers towards areas where policy is needed".[23] In fact, these concepts are concerned with *intervention,* more precisely with intervention of the states themselves. They are oriented on the output of these interventions. Tools of intervention are for example legislation, administrative regulation, judicial review, public expenditures and removal of political power.[24] The EU strategy of the open method of co-ordination concerns a mix of these tools.

The words of Terry Ward reflect an important difference between the Quality of Life approach and the social quality approach with regard to the policy aims of both projects. The Quality of Life project regard three welfare concepts (Quality of Life, social cohesion and sustainability). The theoretical relationship between these concepts however remain unclear. There is not a theoretical framework, as in the social quality approach, to connect these welfare concepts. Based on these three welfare concepts six so called goal dimensions are distinguished: improvement of objective living conditions, enhancement of subjective well-being, reduction of disparities – equal opportunities – social exclusion, strengthening social connections and ties – social capital, enhancement/ preservation of human capital and enhancement/ preservation of natural capital. These goal dimensions are reorganised in life domains, which are identical with the EU policy objectives. It seems as if the point of departure is not the theoretical framework, but the idea to bring the research in line with the European Union policy objectives. This of course can be declare by the aim to develop a European System of Social Indicators. The social quality approach however starts from its conceptual framework in the hope to "direct policy makers to areas where policy is needed".

An other recent example of an important report on indicators for social inclusion is "Indicators for Social Inclusion in the European Union" by Tony Atkinson, Bea Cantillon cs.[25] This report addresses the outcomes of decisions made by the Lisbon European Council in 2000. It focuses on the incorporation of social inclusion within the overall strategy of the European Union. Furthermore, it will pave the way for an agreement to advance social policy on the basis of an open method of co-ordination at Union level. The authors make a plea for a pragmatic approach to measure output of policies. Therefore, they present a number of principles to develop an indicator construction; "this we have taken to mean that the social performance indicators, for the present purpose, should in principle be concerned with output not with input. The aim is to measure social outcomes, not the means by which they are achieved". The absence of a conceptual framework as the basis for the measurement of welfare and social change is important to notice. The Atkinson group makes a plea for a technical and objectivist approach in order to formulate conclusions about existing circumstances. Its indicators do not refer to an explicit theoretical based conceptual scheme. Therefore, also the concept of social inclusion does not have a theoretical basis in their report. Furthermore, the report does not address the lack of coherence between terms as inclusion, poverty, cohesion, exclusion etc. This is a logical consequence of its pragmatic approach.

The Social Quality approach emphasis *social intervention*. Social intervention means in the policy literature normally, the removal of social problems with public finance under control of the state.[26] In the context of the Social Quality approach, quality does not refer to a given society but to *societal processes*. According to Ota de Leonardis, Social Quality does not only refer to products or outcomes, but especially to social processes: "relationships, discourses and practices, instead of goods, services and consumption (. …) It concerns the inter-subjective level of social life – neither just objective nor

[23] Cited by Frank Vandenbroucke (Minister for Social Affairs and pensions, Belgium) in his closing speech at the Conference: 'Indicators for social inclusion-making common EU objectives work', Antwerp, 14 September 2001.
[24] R.R. Mayer, Social Planning and Social Change, Englewood Cliffs, New York, 1972, cit. in by F.X. Kaufmann/ B. Rosewitz: Typisierung und Klassifikation politischer Massnahmen. In: R. Mayntz (Hrsg.): *"Implementaiton politischer Programme II"*, Westdeutscher Verlag, Opladen, 1993, p30.
[25] T. Atkinson, B. Cantillon, E. Marlier, B. Nolan, *'Indicators for Social Inclusion in the European Union: Version SOCIND 23'*. Brussels: Ministry of Social Affairs, 2001. This report is extensively discussed during a conference in Antwerp, 14-15 September 2001.
[26] The state is not the only unit of the intervention, also NGO´s, third sector organisations etc. are forms of social interventions more of less independent of the state.

only subjective."[27] In this sense, the quality of relations among members of society, the binding effects of these relations, the rupture of the relationship between individual and society with new forms of poverty, the feelings of mutual commitment and trust created by common values and norms, are very important. These points are also points of attention in the Quality of Life concepts.[28] But there is a big difference. In the Social Quality approach not only outcomes but especially the nature of the interventions are important. It refers to processes and acting individuals. The concept concerns processes of self-realisation, the formation of collective identities, interaction, interactive communication, transformation of values, collectivisation of norms, social recognition and participation. In these processes actors play an important role.

The subject matter of social quality is *'the social´* as the outcome of the dialectic between the self-realisation of individual subjects as social beings and the formation of collective identities.[29] This assumption implies two things: social practices are decisive for the building or for the deformation of the Self, and the human subject depends for its self-realisation on recognition by the ´other´. In the words of Honneth: "The freedom of self-realisation, in this opinion, cannot be measured by the extent to which the individual in the relationship with his cultural context of life has succeeded, but the degree of recognition he was able to obtain for his freely chosen goals in his societal environment."[30] In other words, we have to develop a system of measurement instruments focussed on the dialectic between self-realisation of individual subjects and the formation of collective identities. When we will improve the quality of the social – the main goal of the social quality-approach – we have to improve: (i) possibilities and chances for self-realisation in relationship with the formation of collective identities, and (ii) possibilities and chances for collective identities, which stimulate the self-realisation of the individuals. This should be based on democratic norms and values as ethical legitimisation. In conclusion, the social quality approach is based upon a new theory on the subject matter of 'the social' and its measurement instruments should be determined by this theory. This is an important difference with other approaches.

6.2.2   The analytical or methodological dimension

With regard to the analytical dimension or applied methodology we may discuss interesting differences between the three main approaches related with respectively the 'Quality of Life', the 'Quality of Society' and the 'Social Quality' construct. In order to address current policies of the European Union we have to ask ourselves how to synthesise information and how to combine several indicators in a conceptual framework for understanding these policies. In the more classical concepts as for example the Quality of Life concepts there is made a distinction between two levels of analyses. First, they make a distinction between indicators at the individual and the societal level. And second there is a distinction between objective indicators, which represent social facts such as living conditions, and subjective indicators, which emphasise the individual perception and satisfaction of the social conditions (see figure 6.3).[31] The operationalisation of these two levels of analysis depends on the goals of the indicator construction and the main points of evaluation.[32]

[27] O. de Leonardis, 'Social market, social quality and the quality of social institutions', in: W.Beck, L.G. van der Maesen, F. Thomesé, A. Walker, *"Social Quality: A Vision for Europe"*, Kluwer Law International, The Hague/ London/ Boston, 2001, p.202.

[28] J. Delhey, P. Böhnke, R. Habich, W. Zapf, *"The Euromodule. A new Instrument for Comparative Welfare Research"*, WZB, Berlin, March 2001, p.9.

[29] Both terms, self-realisation and collective identity are highly problematic. What – for example – is the impact of the notion of self-realisation? And what is the intrinsic aspects of the individual self? Do we understand ´forming of collective identity´ in a functionalistic sense as a ´qualifying condition´ or as process relatively separated from the individual which has hardly any influence on the self-realisation? For this moment, we have noted this question as a theoretical problem, which is standing highly at the agenda of the Foundation.

[30] A. Honneth , *"Desintegration – Bruchstücke einer soziologischen Zeitdiagnose"*, Fischer-Verlag, Frankfurt 1994, p.18.

[31] About the history of this conceptualisation, see note 2. Pioneering for the German approach is the work of W. Zapf, Individuelle Wohlfahrt: Lebensbedingungen und wahrgenommene Lebensqualität. In: W. Glatzer, W. Zapf (Hrsgb.) *"Lebensqualität in der Bundesrepublik. Objektive Lebensbedingungen und subjektives Wohlbefinden"*, Frankfurt/ New York, Campus, 1994.

[32] The range of frameworks reaches from the non-monetary indicators of poverty and social exclusion to a strategic reporting system of the Compass-project of the Bertelsmann-foundation, or from the European System of social indicators (ZUMA) to

Figure 6.3   Levels of indicator constructions

	Objective	**Subjective**
Individual level	objective living conditions (e.g.income)	subjective well-being (e.g. income satisfaction)
Societal level	Quality of Society (e.g. income distribution)	perceived quality of society (e.g. strength of conflicts between rich and poor)

Source: J. Delhey e.o. note 12, p.10

An approach that focuses on the individual and societal level of welfare, objective living conditions and subjective well being, requires a multidimensional frame of measurement. Such a frame of measurement should combine quantitative and qualitative, material and immaterial indicators, facts and satisfactions, general and specific designed indicators (issue-, situation-, life domain-, area based- or policy-specific). These aspects may be discovered in various mixtures in the different frameworks, which are oriented to the concept of Quality of Life or to the more specific new welfare concepts.
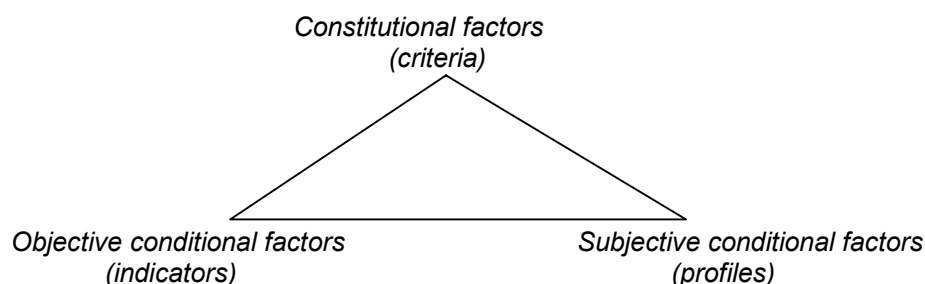
In the Social Quality approach, these aspects are present as well. But, the conceptual embedding is really different. The Social Quality approach distinguishes between *three levels*: the level of constitutional factors, the level of objective conditional factors and the level of subjective conditional factors. Together they form the so-called methodological triangle (see figure below). The method of measuring social quality is based on this triangle. It indicates that to measure the level of social quality we do not only need indicators but also profiles and criteria. The indicators are connected with the objective conditional factors, which means that indicators indicate the objective conditions in society which are necessary for social quality. These objective conditions are defined in a social quality quadrant that consists of socio-economic security, cohesion, inclusion and empowerment. These conditions determine the opportunities of the social: people should have the capabilities to interact (*empowerment*), the institutional and infrastructural context should be accessible for all people *(inclusion)*, the necessary material and other resources should be available for the existence of the interacting people (*socio-economic securtity*) and the necessary collectively accepted values and norms have to enable community building (*cohesion*.)

The profiles are connected with the subjective conditional factors. They refer to the subjective interpretation by individuals of their own potential to realise themselves in society. These subjective conditions are defined in a second social quality quadrant that consists of collectivisation of norms, social recognition, participation and sensitivity towards values. The subjective aspect in the social quality approach is more than an evaluation of individual preferences or subjective well being as is measured by Quality of Life concepts. The idea of profiles is to have a closer look at how individuals see their own potential to realise and develop themselves in society.

The combination of these objective conditions in society and the subjective self-interpretation of individuals present the points of departure for applying criteria for determining the final level of social quality in society, cities, communities. These criteria refer to the basic assumption of the social as the dialectical relationship between self-realisation and forming of collective identities.

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local sustainability profiles of the European Sustainable Cities project. The basic pattern of these two levels of analysis is present in different variations.

Figure 6.4   Methodological triangle

*Constitutional factors
(criteria)*

*Objective conditional factors   Subjective conditional factors
(indicators)   (profiles)*

These three levels are related to each other. They form a totality and are indispensable for the quality of the social. The essential difference in the context of social monitoring and measurement between the Social Quality approach and the other ones concerns this *connection of the levels*. For the realisation of the social through acting individuals two forms of conditions are decisive: the objective conditions in the form of the four social quality-components, and the subjective conditions in the form of the cognitive self-interpretation. The relevant question is: to what extent do these conditions match the substantial and relational aspects of self-realisation in the context of forming collective identities. The methodological triangle will illustrate, that it is not enough to produce a classical construction of indicators of social quality. Nevertheless, the four components create the basis for constructing objective indicators as important point of departure for determining the nature of social quality and its changes.

6.2.3   The political dimension

In contrast to representatives of both approaches, the 'Quality of Life' and the 'Quality of Society', the representatives of the 'Social Quality' approach were eager to start an academic movement to discuss the political, economic and social dimension of the European Union in the near future. Their thesis was, that traditional approaches of policy making in Europe subordinates social policy to economic policy. It reflects on a top-down form of governance, and cannot provide a secure basis on which to build either a socially just Europe or one that reflects the needs and preferences of citizens.[33] Especially the conference of the European Parliament on 'the social quality of Europe', March 2000, demonstrated the lack of coherence between applied concepts as economic progress, social protection, economic security, exclusion, or cohesion. These and other concepts are applied in connection with different national oriented frames of reference and, therefore, cause essential confusion during European oriented debates. The lack of conceptual coherence blocks rational analyses of processes and recent consequences of societal changes at European and national level. A second main point regards the far-reaching fragmentation between the spheres of economic, politics, welfare and cultural policies. Due to this fragmentation, the reciprocity between the different policy fields is lost in thinking as well as in policy-making. This lack of conceptual coherence also stimulates the dominance of economics. Because of this, welfare policy (as social policy in the smaller sense) of the European Union and the Member States is a handmaiden of economic policies since the last decades.

In 1997, the preliminary concept of Social Quality was presented as a new perspective for developing a new theoretical paradigm to analyse and address current political issues. The motive was to develop a conceptual scheme for developing a coherent system of concepts as point of departure for measurement instruments to underpin new policies and interventions of organised citizens. This Social Quality concept is not only meant as a new conceptual scheme, but also as a political project. Because of this double agenda, the Social Quality project will be confronted with two problems: the validity and scientific coherence of the conceptual scheme and the applicability of the concept. In the

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[33] See the Amsterdam Declaration on Social Quality.

second book, the editors have carefully reflected the critics, suggestions and ideas concerning the first design of the concept. The task of the applicability of the concept is now being addressed by the European Thematic Network on Indicators to measure Social Quality and probably in the future by the Research Group on Indicators, Profiles and Criteria. We have to work on a science based system of measuring the Social Quality approach. "Theoretical and methodological well grounded considerations still remain a major challenge."[34]

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[34] R. Berger-Schmitt, B. Jankowitsch, see note-46, p.4.

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