

Poverty and Social Exclusion in the UK

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Lisbon and Beyond:
The EU approach to combating poverty and social exclusion in the last decade

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Poverty and Social Exclusion in the UK Overview

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The primary purpose is to advance the 'state of the art' of the theory and practice of poverty and social exclusion measurement. In order to improve current measurement methodologies, the research will develop and repeat the 1999 Poverty and Social Exclusion Survey. This research will produce information of immediate and direct interest to policy makers, academics and the general public. It will provide a rigorous and detailed independent assessment on progress towards the UK Government's target of eradicating child poverty.

Objectives

This research has three main objectives;

- To improve the measurement of poverty, deprivation, social exclusion and standard of living
- To assess changes in poverty and social exclusion in the UK
- To conduct policy-relevant analyses of poverty and social exclusion

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Abstract

After a very intense period of EU attention to social policy, we are now entering the post-Lisbon period. What will happen is not yet clear. It is important therefore to take an overview of Lisbon. This piece focuses on the approach taken by the EU to poverty and social exclusion over the last decade or so, and especially since the Lisbon Agreement in 2000. It discusses both poverty and social exclusion as they have been configured, measured and 'packaged' in EU policy discourse and practice and looks at both the content of policy and developments in relation to measurement and monitoring. What we find is that the EU has been quietly redefining the measurement of poverty and putting a substance on the more neophyte 'social exclusion' as a 'problem' for social policy. The analysis makes clear that the EU's approach has a number of significant and unique elements. It also has a number of attendant weaknesses.

Key words: poverty, social exclusion, EU social policy, poverty measurement, Lisbon process, policy learning

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Introduction

One of the most significant achievements of the Lisbon European Council in March 2000 was to place social issues firmly on the EU policy agenda, reinvigorating EU social policy which had been in the doldrums since the heady days of the Delors era in the late 1980s and early 1990s. Poverty and social exclusion have been central to this.

The first decade of the new century was a time when the EU made one of the most concerted attempts anywhere in recent history to engage with poverty and social exclusion. There was nothing foretold about this – the EU is primarily a market-making project and its liberal orientation predisposes it towards a market-led strategy for growth rather than, for example, redistributive policies aiming for social justice and equality. Moreover, the EU's space for manoeuvre was and is limited: the principle of subsidiarity (which grants member states autonomy in social policy) and weak legal competence seriously restrict the EU's role in social policy. Against this background, the aim of this piece is to outline and assess the anti-poverty/social exclusion activities of the EU in the last decade. The Lisbon process offers a unique opportunity to study the evolution of poverty and social exclusion as concepts for policy in contemporary times.

The relevant social policy statements, activities and agreements by the EU, especially the Council, Commission and Social Protection Committee (SPC), provide the empirical substance of the article. These are analysed and assessed for how they conceptualise and understand poverty and social exclusion. Focused on the Open Method of Coordination on Social Protection and Social Inclusion – the so-called 'social OMC' - the piece proceeds in three parts. The first section is devoted to a short historical tracing of the two concepts in EU activities. We move on from this to analyse how poverty and social exclusion were framed in terms of objectives and policy orientations and empirically as objects of measurement and indicator development. A short conclusion brings the piece to a close.

The Background to Poverty and Social Exclusion in the EU Repertoire

Neither poverty nor social exclusion was a newcomer to the EU stage in 2000. Indeed, the two concepts have a rather long and intertwined history within the EU.

Poverty is, of course, the elder of the two concepts. EU policy interest in poverty dates back at least until the early 1970s when the first anti-poverty programme was introduced. This programme, like its two successors in the 1980s, mainly consisted of term-limited projects that undertook research, information exchange and evaluation. The word 'programme' is something of a misnomer, however, especially if we take our direction from the nation state



template wherein anti-poverty measures usually take the form of minimum income provisions – redistribution rather than information is their métier. The EU, as always with social policy, is different. The poverty programme consisted of a relatively small number of local projects in a range of member states which were focused on experimental actions around research and anti-poverty activity. Building up a credible information base about social and economic problems in Europe and how they could be counteracted was a key goal of these programmes.

The Commission's plans for a fourth poverty programme in the mid-1990s were scuppered – mainly by Germany and the UK which opposed a role for the EU in the area of poverty other than in the capacity of research coordination. Some say also that it was the attention focused on the politically contentious concept of poverty that was unpopular with member states (Berghman 1995) Since then, a different approach has been adopted and the term 'poverty' has increasingly been accompanied by social exclusion, most often with the latter as the leading concept.

In fact, the EU has been one of social exclusion's main advocates and sponsors, since the concept first appeared in French social policy in 1974 (Silver 1994). As it established itself in France over the course of the 1980s and 1990s, the 'social problem' orientation of the social exclusion approach was highlighted. However, as social exclusion is a concept with more diverse set of references than this. It has both micro and macro-level application. At the micro level, it reveals the cumulation of numerous situations of disadvantage in the lives of individuals, such as low income, poor health, low education and skills and economic, social and political isolation. Individuals are seen to be cut off from the mainstream, cast adrift by the disempowering and immobilising effects of a layering and persistence of various disadvantages. At the macro level, the concept provides two types of structural critique. On the one hand, economic change and the decline occasioned by de-industrialisation and jobless growth have distanced many people from the labour market. In its alternative structural register, social exclusion points to problems in and of society. The failure here is one of social integration - the capacity of existing structures and arrangements to enable people to be active participants in social life, to engage in supportive social relations and give their loyalty to a common moral and social order. With such a broad-ranging set of references, social exclusion is one of those chameleon concepts whose meaning can be stretched in numerous, even conflicting, directions. A short overview of the usages of the concept in EU discourse demonstrates the point.

Social exclusion made its first official appearance on the EU stage in 1989 - The Community Charter of Fundamental Social Rights for Workers (the Social Charter as it is known) was one of the first high-level EU policy documents to refer to social exclusion. The context here was the run-up to the Single European Market. The Resolution of the Council of Ministers for Social Affairs on Combating Social Exclusion, issued in 1989, was the concept's birth



certificate, however. Laying a strong claim to the concept as a legitimate concern and policy property of the EU, social exclusion was differentiated from poverty.

The emphasis was laid on structural factors and in particular (reduced) access to the labour market. While social exclusion was seen as a macro problem, the solution proposed was micro in nature - improve opportunities and access to services and resources such as education, employment, housing, community services and medical care. The next significant document in the EU career of social exclusion was a recommendation from the Council of 24 June 1992 on *Common Criteria Concerning Sufficient Resources and Social Assistance in Social Protection Systems*. Concerned as it was with a commitment to minimum income provisions in the member states, this was arguably more focused on poverty than social exclusion but it did endorse the 1989 Resolution in making reference to the need for the right to sufficient resources to be accompanied by policies for the economic and social integration of those affected. In late 1992, the Commission issued a Communication with the title *Towards a Europe of Solidarity - Intensifying the Fight against Social Exclusion, Fostering Integration*.

This was the high watermark of EU discursive engagement with social exclusion, a visionary document providing, up to then, the most extensive (and theoretical) treatment of social exclusion in the EU narrative. Underlining its dynamic, structural and diverse character, the Communication developed a horizontal understanding of social exclusion, pointing out that social exclusion involves not just disparity between the top and the bottom of the socioeconomic scale but also between those comfortably placed within society and people on the margins.

The White Paper on social policy, published in July 1994, represented the next 'big moment' in the history of the relationship between the concept of social exclusion and the EU (European Commission 1994). This document, while very focused on labour-market related measures and with an undertone of what would later become known as 'activation', made a case for EU action in the field of poverty and social exclusion, especially in terms of the integration of those excluded from the labour market. At this stage unemployment, employability, labour force adaptation and job creation were monopolising policy attention in Europe. Conceiving of these as European phenomena or problems, the Amsterdam summit in 1997 gave the EU competence in employment policy. However, in a considerably less-heralded development, it also inserted social exclusion into the Treaty, adding a new article (137(2) TEC) authorising measures to facilitate co-operation among member states in order to combat social exclusion.

Although if judged against the yardstick of legal regulation it might be seen as weak in that 'knowledge exchange' is hardly a substitute for strong EU competence, the new Treaty provision was to provide a legal basis for a specific EU-wide process in this area in 2000. This, the next appearance of



social exclusion on the EU stage, was in a starring role.

As will be obvious, for the first ten years or so, the EU more or less limited its engagement with social exclusion to the discursive level. In effect: these were years of laving the groundwork for social exclusion as an idea on the EU stage. Of considerable significance here were the anti-poverty programmes. Elucidation of the nature of poverty and social exclusion, in themselves and in terms of policy response, was a key contribution of these programmes. They offered to the EU in general, and the Commission in particular, a grounded understanding of 'new poverty' as being one of many possible expressions of a complex process of collective and even cumulative deprivation occurring simultaneously in several strategic locations within society (Rojas 1999). The idea of systemic failure – drawing together the legal system, the labour market, the welfare state and the family and community – was a particular insight (Berghman 1995). But nothing ever proceeds alone at EU level. Being hamstrung by missing legal competence in social policy, the European Commission took every opportunity it could to promote and develop social exclusion as a leading social policy concept.

The European Observatory on National Policies to Combat Social Exclusion, which was Commission initiated and funded between 1990 and 1994, helped significantly. This was more explicitly intellectual than the poverty programmes, consisting of a network of national 'experts' with the function of monitoring national trends and providing the Commission with research and ideas about new policy approaches. Over the course of its four-year lifespan, it devoted huge attention to elaborating a theoretical frame for analysing social exclusion, especially in terms of a denial or non-realisation of social rights (Room et al 1991, 1992; Robbins et al 1994). In these hands social exclusion was given strong social democratic resonance. With poverty out of political favour, social exclusion had numerous benefits: it seemed to fit the changing times in capturing the emergence of complex new forms of deprivation; its wide analytic lens gave it a particular capacity to analyse change and dynamics; as a new concept it was not associated with any of the existing welfare state models in the Union and so an EU stamp could be imprinted on it without political fall-out (Daly 2006). Bauer (2002) has suggested that the Commission had to generate a new discourse (that is, social exclusion) in order to create a place for itself and to present itself as a trend-setter.

So how did Lisbon conceive of poverty and social exclusion? To address this question we must look at both the policy emphases and also activities around measurement and empirical identification of poverty and social exclusion.



Social Policy Emphases in Lisbon

The agreement reached at Lisbon in March 2000 by the EU heads of state ushered in a period when social exclusion was foregrounded for the purposes of EU policy co-operation and co-ordination. For the first four years of Lisbon anyway, social exclusion sat alongside job creation and economic growth as objectives of this new phase of EU development which saw the EU instituting a range of processes to centralise policy framing, especially in employment, social exclusion, pensions and health care, and achieve a balanced pursuit of economic, employment and social progress (Dieckhof and Gallie 2007: 481). From the perspective of social policy, the initial Lisbon agreement brought two core developments: an agreement that member states would co-ordinate policy on poverty and social exclusion; the application and development of the Open Method of Co-Ordination (OMC) to this domain, which aimed for co-ordination of member state policy. The open coordination method was later launched in pensions (in 2001) and in health and long-term care (in 2004).

It would be wrong to treat Lisbon as if it were a single development or phase. In fact, there have been two social Lisbons (at least). The first lasted until 2004, the second from 2005 until 2010 when the Lisbon Strategy and all agreements and plans relating to it come to an end (the time of writing). Dissatisfaction with 'results' and the pace of achievement of the original objectives especially in relation to economic growth and job creation led to a review of the process in 2003 (European Communities 2004). Against the wishes of some actors in the process – especially the economically-oriented actors - social Lisbon survived. A new cycle of governance, begun in 2005 with the relaunch of Lisbon in March of that year, saw the integration of the employment and economic policy processes into a single national reform process (focused on 'growth and employment making for social cohesion'). The social inclusion OMC was kept separate, although there was to be greater synergy and 'conversation' between its strategic goals and those of the national reform process and greater synchronisation of timing. The social process also underwent reform, mainly in that the heretofore separate processes of social inclusion, pensions and health care were integrated ('streamlined' in the EU's typically inimitable language) from 2006 on in an attempt to rationalise and strengthen them.



The objectives also changed. The table below shows how.

Table 1 Dominant Emphases of the Common Objectives Relating to Poverty and Social Exclusion in the EU under Lisbon

2000-2004	2005 - 2010
Facilitate participation in employment and access by all to resources, rights, goods and services	Guarantee access for all to the basic resources, rights and social services Address extreme forms of exclusion
To help the most vulnerable	Inclusion in employment Fight poverty and exclusion among the most marginalised groups
Prevention of the risks of social exclusion	
Mobilisation of all relevant bodies	Ensure good policy co-ordination and involvement of all relevant actors, including people experiencing poverty

Comparing the emphases over the different periods, the table shows that between 2000 and 2004, EU social policy had a blueprint for a relatively radical attack on social exclusion.

It covered a range of bases: access to resources, rights, goods and services, helping the most vulnerable, preventing social exclusion, and mobilising those affected and those involved in other ways. The orientation is more social democratic than anything else: the desired European model is one that emphasises social rights and understands the 'community' as one in which people are or should be economically, socially and politically included (Daly 2008). However, this 'strong vision' lasted only a few years and by 2005 the blueprint had changed significantly. There were three main changes. First, rather than poverty and social exclusion the process now defined itself in terms of social protection and social inclusion. Also, 'making a decisive impact on the eradication of poverty and social inclusion' became one of three strands (along with pensions and health and social care) rather than the prime focus as previously. While there are obvious linkages between these three strands, a model of social policy consisting of poverty/social exclusion, pensions and health care is rather hollow if not incoherent. The second change was in the understanding of how social inclusion (now dominant as a term) would be brought about. This was seen to follow from success in achieving targets on economic growth and jobs and the reform



('modernisation') of the European social model rather than, as previously, the result of concerted actions. Somewhat ironically for a concept with such a strong sense of agency and engagement, social exclusion was rendered in rather passive terms. This set the scene for the third set of changes – the objectives themselves became narrower and assumed a more liberal cast. Labour market participation came to be more heavily emphasised as did the 'extreme' forms of exclusion. Furthermore, prevention as a specific objective disappeared and the efficiency of policies and their interaction and coordination replaced 'mobilisation'. 'Involvement' was the new term used, which is framed in terms of governance rather than political engagement.

While we do not have the space to undertake a detailed analysis here, looking at how these objectives came to be framed as issues for policy, especially in the Joint Reports produced by the Commission and the Council as a commentary on the national reports of the member states, one sees three substantive issues appear repeatedly: the inclusion of those furthest from the labour market, child poverty and child-wellbeing, and homelessness and housing exclusion (see Frazer and Marlier this volume). Running throughout these – and also more generally in the EU's approach through Lisbon - is a recognition of the importance and availability of a range of social services. All can be traced to a social exclusion perspective (although they are rooted in other concerns and concepts as well). Those furthest from the labour market are seen to be at particularly high risk of exclusion; the concern with child poverty reflects an understanding of the long-term effects and intergenerational transmission of poverty; the emphasis on housing and other services is underpinned by a recognition that income on its own is an insufficient cause of and response to exclusion. If Lisbon has a distinctive identity as a social policy project, it is in the emergence/acceptance of these by the Council and the Commission (although not necessarily by the member states), as common social policy concerns.

Poverty and Social Exclusion in Empirical Terms

Poverty and social exclusion have been of interest to the EU, too, as objects of empirical enquiry. Insights about measurement and the provision of new data have been one of the major contributions of the Lisbon process.

While there is no single definition of poverty and social exclusion the European Commission in 2004 defined it in the following terms:

"People are said to be living in poverty if their income and resources are so inadequate as to preclude them from having a standard of living considered acceptable in the society in which they live. Because of their poverty they may experience multiple disadvantages through unemployment, low income, poor housing, inadequate health care and barriers to lifelong learning, culture, sport and recreation. They are often excluded and marginalised from participating in



activities (economic, social and cultural) that are the norm for other people and their access to fundamental rights may be restricted."

A number of elements stand out. First, a relative conception of poverty prevails in that the adequacy of the income benchmark or threshold is defined by the extent to which it enables an acceptable standard of living (hence relative). Second, there is no definitional separation between poverty and social exclusion – they are linked in terms of income being just one of a number of factors comprising multiple disadvantage. Third, a broad understanding of social exclusion is indicated by the central place given non-participation in a range of activities. One could say also that this definition hovers around the micro level – poverty and social exclusion are phenomena that affect individuals. Moreover, there is no clue to or attribution of broader cause – it is as if these eventualities just 'happen'.

One of the key elements of the OMC and of the EU's engagement with poverty and social exclusion is that it set in train a series of data and measurement-related resources, discourses and activities. A new EU-wide data survey – the EU Statistics on Income, Social Inclusion and Living Conditions (EU-SILC) – was initiated in 2003. This replaced the European Community Household Panel Survey (ECHP). It is based on the idea of a common 'framework' and no longer a common 'survey' as was the case for the ECHP. The common framework defines the harmonised lists of target primary (annual) and secondary (every four years or less frequently) variables to be transmitted to Eurostat; common guidelines and procedures; common concepts (household and income) and classifications aimed at maximising comparability of the information produced. EU-SILC mainly focuses on income - detailed income components are collected mainly at personal level although a few components are included in the household part. In addition, information on social exclusion, housing condition, labour, education and health information is obtained.

The process has also generated a lot of activity around the production of a set of cross-national statistical tools and benchmarks to inform and improve policy monitoring in the domain of poverty and social exclusion. This has been a primary task of the SPC, the expert body, consisting of delegates from each member state, which serves as a vehicle for cooperative exchange between the European Commission and the member states in regard to modernising and improving social protection systems and their indicators. In 2001 the Committee established an Indicators, Sub-Group to work on the development of indicators and statistics in support of its tasks.

The result is not just an active discourse about the measurement of poverty and social exclusion but an agreed set of common indicators that have been updated over time. At the 2001 Laeken European Council, 18 indicators were adopted based largely on the information available in existing sources at that time (Table 2, column 2). These have been further developed and reworked, especially in 2005 when 'Lisbon II' came on stream. In 2009 also, the SPC



adopted a revised set of indicators. Indicators and data are of deep significance - Marlier et al (2007: 146) suggest that the investment in both the EU-SILC and in the development of common indicators will transform the basis for social reporting in the EU. Their contribution to generating a 'Europeanisation of problems' should not be under-estimated. To the extent that a comparison of the situation across countries is possible it is seen to enable a common representation of the problem and the devising of common solutions on the basis of the exchange of knowledge and good practice (Bruno et al., 2006: 533).

The discourse and practice as regards indicators is becoming more differentiated over time. From the outset, primary indicators were differentiated from secondary indicators, then revision in 2006 added another layer of context indicators. Now, since June 2010, there is a further elaboration. Table 2 shows the evolution of the primary indicators over the four iterations. Looking at the left-most column, we can see that from the outset poverty and social exclusion were conceptualised in terms of five domains: income (level and inequality), unemployment, educational disadvantage, health status and regional cohesion (measured by regional variation in employment rates). Of these income predominated. In 2006, the indicators underwent major review. being revised especially to reflect the new tri-partite social protection and inclusion process. A glance at the appropriate column in Table 2 shows the inclusion of some new domains: employment gap of immigrants, material deprivation, child-wellbeing and housing. In what can only be regarded as a 'downgrading', income inequality, life expectancy and regional cohesion were made context indicators. In 2009 a set of indicators for material deprivation was agreed. These focus on financial stress, consumption deprivation and household facilities - a threshold of lacking any three is designated as the official cut-off for deprivation. This move to a standardised measure of disadvantage has been in the pipeline for a considerable period. The agreement to have an indicator on it is significant in an EU-context. It is also controversial as setting out a threshold for standard and style of living has many political implications and is considerably adrift of how many member states conceptualise and measure poverty and deprivation.

Table 2 Commonly Agreed Primary Indicators of Poverty and Social Exclusion

*As in the streamlined social inclusion 'Laeken' portfolio of primary indicators as agreed by the SPC on 22 May 2006 (see http://ec.europa.eu/employment_social/spsi/docs/social_inclusion/2006/indicat_ors_en.pdf)

** European Commission (2009).

Taking the indicators as a whole, there are two underlying motors of development. First, there is a push to finesse the measurement of poverty as much as possible. Hence, the number of measures of poverty is increasing. In practice, the EU has gone beyond a purely relative income poverty measure



and between 2001 and 2009 the commonly agreed indicators were developed to include:

At-risk-of-poverty rates at different thresholds (40%, 50%, 60% and 70% of the national median equivalised household income)

- An at-risk-of-poverty gap
- An at-risk-of-poverty rate _ anchored _ at a point in time
- A persistent at-risk-of-poverty rate

A material deprivation indicator.

The breaking news in relation to the social OMC is the agreement by the Council at its June 17th 2010 meeting on a poverty reduction target – a target of 20 million fewer poor by 2020 (Frazer et al 2010). This is a major development – targets in the social domain have always proved controversial and no EU-wide poverty reduction target was agreed over the 10 years of the Lisbon process – in fact this is the first such target ever in the EU. The last column in Table 2 reports on the indicators to be used to measure progress towards this target. In effect, there are to be three such indicators: at risk of poverty rate (based on the 60% median threshold), deprivation (measured by a more lenient threshold of lacking four of the listed items (in 2009 it was any three); and the proportion of people in jobless households. The latter is new and is effectively a measure of so-called 'work intensity'. Three significant points should be noted about the target and indicators. First, the more lenient threshold of deprivation was selected because it increased the targeted population by 40 million (to 120 million from 80 million using the 3-item threshold). Hence, the more lenient definition increases the chances of meeting the target. Secondly, although the discourse and nomenclature is of poverty, the inclusion of jobless households as a prime indicator suggests an economic/labour market framing of social inclusion. Thirdly, not all three indicators will be used to measure either poverty or the achievement of targets. Member states may choose any of the three or all three. In fact, they may choose an indicator of their own preference, although they must make an evidence-based care for their choice of indicator if they move away from the EU specified indicators.

While the underlying thrust is to be as precise as possible about the measurement and what is being measured, one outcome of this now common practice of giving multiple definitions and indicators is to open poverty up as a matter of interpretation. Contributing also to a possible destabilisation of the meaning of poverty activity is a linguistic change—instead of poverty the EU



now speaks in terms of 'at risk of poverty'. Some seem to feel that this is a more accurate term but it does tend to change the meaning of poverty from a condition to a risk. An overall effect is to destabilise the meaning of poverty and render it a function of measurement rather than a condition that exists for real people in real life. A second driver of developments is the gradual expansion of the meaning and application of social exclusion. Looking at the indicators that have been added over time we can see a deepening of the meaning and reference set for social exclusion. Apart from income, there is labour market involvement for individuals and as a property of households, education, health, child-wellbeing and material deprivation. While it is not clear what will happen to these broader indicators now that the poverty reduction target is to be seen in terms of three, the set of indicators has been broadening over time.

Overall, the work on indicators and measurement is moving towards identifying both conjunctures of conditions and the thresholds which signify their existence. It is on the cusp of a major challenge - to provide a bridge between 'social' and 'material' factors. There are a number of striking absences as well as Marlier et al (2007: 46-8) point out. These relate to coverage – for example there is no indicator for the objective of mobilisation or involvement of stakeholders – and the fact that the indicators relate to a mix of outcomes and policy 'inputs'



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Conclusion

As mentioned, the Lisbon process constitutes a very significant engagement with poverty and social exclusion, especially from a technical and intellectual point of view. In fact, this may well be Lisbon's legacy (rather than substantive social policy). Poverty has been put on the political agenda in Europe and the still new concept of social exclusion has been elaborated as an approach to social problems. The EU approach has a number of hallmark features: a multidimensional understanding of disadvantage is offered which merges incomes with a wider perspective but stays close to exclusion from the labour market; an emphasis is placed on participation in policy and other processes by the disadvantaged themselves; several measures of poverty and disadvantage are juxtaposed. In truth, poverty and social exclusion are far from stable in EU usage and aspects of the EU's considerable activity are actively contributing to a process that is destabilising the meaning of poverty especially. Looked at over time, one sees several competing visions in the EU discourse: one focusing primarily on low income and access to minimum income or social assistance; one focusing on activation and labour market exclusion as the primary cause of social exclusion; an expansive understanding of social exclusion alongside a narrower, extreme case type of focus, from the social conditions of all to those of the poor and marginalised. At the moment, the development of the EU's measurement and other activities is being driven by either empirical sets of interests or else political compromise. A discussion of how theoretically well aligned the different concepts and approaches are to each other and to the reality of people's everyday lives seems overdue.

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