

The development of social inclusion policies in the European Union

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Summary

The thesis focuses on the research question ‘To what extent did the Council of the European Union changed its emphasis in its social inclusion policy coordination since 1989?’. It should give insight how the Council’s social inclusion policies changed during the time frame. Therefore it looked at policy documents about social inclusion, these documents were content analysed in a quantitative and qualitative way. The outcome was that Social inclusion Policy had two major turning points in social inclusion policy. One is in the year 2000 which added a knowledge-based dimension to social inclusion policy. The other is in 2008 which turned the overall development of inclusion policy from a relative independent social inclusion policy to one which is closer tied to economics. It is concluded that social inclusion changes its emphasis when the overall policy focus has changed

1. Introduction

Since 1989 social inclusion has become a key concept to the European Union’s social dimension. Even this may make them worth looking at anyway, their importance may have consequences. Social inclusion policies were the EU’s alternative to poverty politics which had been the centre of most Welfare States since their beginnings. Therefore a shift between the two can cause changes in the understanding of solidarities, social class and other welfare state related issues. Also it may influence the overall social policy design at least on a European Union level (Bhalla & Lapeyre, 1997; Silver 1994; Atkinson, & Davoudi, 2000; Bèland, 2007).

Social inclusion policy is quite malleable, because most of its measures are related to other policy areas and depending which relation is given more attention to social inclusion policy might change. Such a change in emphasis can change the design of inclusion policies drastically and make them look very differently (Bhalla & Lapeyre, 1997; Peace, 2001). Therefore this thesis will look how the emphasis of the EU on social inclusion policies changed over time. Due to the fact that social inclusion only started to be mentioned on the EU level in 1989 the thesis will also focus on developments since 1989.

While the European Commission is considered as the working house of the EU (Hix & Høyland, 2011), the Council of the European Union (from here on referred to as Council) is all in all the most powerful institution in terms of a conflict between the institutions (Hix & Høyland, 2011). In addition the Council has concluded most of the documents which are regarded as key developments in the social inclusion discourse in the European Union. Additionally the Council is the institution that can set up developments in social inclusion policy design because it is allowed to produce long-term strategies or determine indicators that measure policy success (Ferrera et al, 2002; Atkinson, 2002). For this reason the thesis should also focus on actions by the Council.

The thesis should answer the question: *‘To what extent did the Council of the European Union changed its emphasis in its social inclusion policy coordination since 1989?’*

The answer to that describes the development of plans about social inclusion policies over time and point out how they changed.

In the following a framework about social inclusion and a short oversight over the development of the EU’s Social Policy will be given. Afterwards the Methodology for the paper will be presented, and then the actual analyses will be conducted. In the end a conclusion will be given.

2. Framework

2.1 Social Inclusion

Social inclusion is about tackling social exclusion, so integrating the excluded or to prevent exclusion (Atkinson et al, 2005). So to understand what social inclusion is all about, it must be clear what social exclusion is. Therefore the next section will introduce the concept of social exclusion.

Intuitively social exclusion is connected to concepts like poverty or deprivation (Peace, 2001), but it can be clearly distinguished from them. While poverty and social exclusion are closely related concepts are about distributional questions and livelihood security is social exclusion about relational issues. People are considered to be social excluded when their relation to the society is discontinuous or dysfunctional. Therefore are social inclusion policies about integrating people into society who are unable to be a full member of society (Bhalla & Lapeyre, 1997; Atkinson et al, 2005).

How this relationship is defined depends on the view how the state looks like (Silver, 1994). Independent from that social exclusion is a multi-dimensional concept; therefore social inclusion is also a multidimensional concept. The most important dimensions are the economic, employment and ‘social and cultural’ one (Bhalla & Lapeyre, 1997; Peace, 2001; Dieckhoff & Gallie, 2007; Daly, 2008).

For this thesis social inclusion policies will be understood in this three dimensions and the development of the knowledge-based society, which includes in particular the knowledge-based economy plans and social investment strategies.

2.2 The dimensions of social inclusion

The economic dimension of social policy focusses on the ones without sufficient access (economic) resources and property. It has a fluent connection to poverty policies since both look at lacks of resources. In other terms the dimension looks at people who do not benefit from the wealth of society, because they do not have or cannot access adequate resources to do so. This dimension should help anyone enjoy the benefits of economic growth. It is the connection between social and economic policies in social inclusion policies and has therefore often an economic design or is connected to economic problems (Daly, 2008; Peace, 2001; Atkinson, 2002; Vanhercke, & Lelie, 2012).

The Employment Dimension puts emphasis on the importance of work to be a full part of society. Mostly the unemployed are the most important target group of this dimension since unemployment is a big risk to get socially excluded and therefore employment can be an assurance of inclusion. This is caused by the fact that having employment guarantees regular contact to other people and having a purpose in the society. Therefore labour market and inclusion policies can be strongly interconnected (Dieckhoff & Gallie, 2007; Atkinson, 2004). An important trend in employment policies which is also expected to effect this dimension is the increasing importance of active labour market policies, which are about incentivising the individual to take up any employment as fast as possible (Jenson, 2010; Vandenbroucke & Vleminckx, 2011).

The social and cultural dimension is maybe the most straight forward dimension of inclusion policies. It should make sure that people are connected to the mainstream society. This dimension is concerned with issues to what extend an individual is enabled to live a life worth living inside the society. In this dimension social and cultural problems which can cause exclusion should be tackled. It looks if an individual can access the benefits an individual should have from living in a society like housing, health or understanding of the cultural heritage of a nation. This dimension can be understood as a collective for all issues of establishing a functioning connection of individuals into the society (Room, 1999; Peace, 2001).

The knowledge-based society is not a traditional dimension of social inclusion policies. But it is a very important development during the observed time and has put one potential risk group of social exclusion in an even more vulnerable position, the uneducated. They face in a society which is centred on knowledge special problems which may need special attention. Furthermore the developments of the knowledge-based society have brought some special challenges for inclusion policies, by enlarging differences between the educated and uneducated (De Muro et al., 2011; Powell & Snellman, 2004). But the knowledge-based society has not only its special social problems it has also its 'own' social policy, which is called social investment. The basic idea of social investment is to invest in people so that they are able to live independently of social support in the future. This can be interpreted in two ways, it can be a pure investment in human capital and is therefore labour market oriented or as an investment that focuses on the inclusion of people. This implies that social investment policies are mid- to long-term oriented (Vandenbroucke & Vleminckx, 2011; Brine, 2006; Cantillon, 2011).

Table 1: The Dimensions of Social Inclusion

Dimension	Key Issues	Key Policies
Economic	Poverty, Material deprivation,	Income support, (financial) transfers
Employment	Unemployment,	Incentives to take up employment or becoming active in job search, improving skills that will help to find a job
Knowledge-Society	Low education, knowledge	Social Investment, preparing

		people for problems they will face during their life course
Social and Cultural	Disconnection from social and cultural life, not able to access social service, social services are inadequate,	Improving/adapting social services,

(Peace, 2001; Atkinson, 2002; Vandenbroucke & Vleminckx, 2011; Powell & Snellman, 2004)

2.2. Development of the EU's Social Policy

This part should summarize how the domain of the Social Policy developed on EU level. The first steps were done during the 1970s. The 1973 'The *Report on the Development of the Social Situation in the Community in 1973*' document is considered as the first step of integration in the social policy domain (Atkinson, 2002). While gradual progress over the eighties was made like first documents on poverty and social exclusion, the progress in terms of institutionalizing Social Policy was small (De la Porte et al, 2001). In 1992 this was supposed to change by including existing social policy documents into the Maastricht Treaty but this did not happen due to the opposition of the United Kingdom. However in 1997 an agreement on Social Policy was introduced in the Treaty of Amsterdam, so a lot of things on which the Member States already had agreed up on became introduced to the treaties. In addition the European Employment Strategy (EES) was launched (Ferrera et al, 2002; Heidenreich, & Bischoff, 2008).

The next key year is 2000 in which the Lisbon Agenda was agreed up on which should make the EU the most competitive knowledge-economy in the world. Next to that this made Social Policies important to the Union. In this agenda the Union included Social Policy goals into its strategic goals for the next ten years like increasing social cohesion in Europe. Even more importantly it introduced the Open Method of Coordination (OMC) to the EU. The OMC is a soft law tool which should help the member states to coordinate and improve their policies. This is done by developing common benchmarks and policy reviews which should lead to learning effects by the member states (Daly, 2006; Ferrera et al, 2002; Heidenreich, & Bischoff, 2008). Also the Lisbon Agenda introduced the goal of the knowledge-based society to the Union's goals, this introduced the knowledge-based dimension to the Social Policies (Powell & Snellman, 2004; Brine, 2006).

Later on in 2000 important elements were added to the OMC. In Nice the Member States agreed to prepare National Action Plan (NAP) for different social policies and it was agreed that those should be evaluated by qualitative indicators (the indicators for social exclusion were later on adopted in Laeken 2001). In addition the European Union adopted its social agenda which should support reaching the main goals of the Lisbon Agenda which had Social Policy aspects (Ferrera et al, 2002; Atkinson, 2002).

In 2005 the Lisbon Agenda was revised to some extent to ensure that its main goals could be reached and keep the EU on track. The Social Policies faded from the spotlight during that revision since a prioritization for growth and jobs was the course of action. Also the different Social Policies became more integrated into each other. The most important aspect of that was

coordination of Employment Policies with the other Social Policies (Dieckhoff and Duncan, 2007).

Three years later the financial crises happened which had effects on Social Policies in the EU. The crises had less effect on the institutional setting but it limited Social Policies in terms of budget and scope in a sense that it put economic issues on top of every agenda (Vandenbroucke & Vleminckx, 2011; Buckley & Howarth, 2010).

In 2010 the EU agreed on the Europe 2020 strategy which is similar to the Lisbon agenda a strategy for the decade to come. This strategy is the first that includes quantitative targets for Social Policy on the EU level. In the strategy the EU states that it wants to create 'inclusive growth' which is economic growth that includes everyone. So in the Europe 2020 Strategy the EU planned to ensure that the benefits of economic growth are beneficial for everyone this should be done by a stronger coordination of economic, social and employment policies (Copeland and Daly, 2012; Armstrong, 2012).

2.3. Expectations

Social inclusion policies were thought to be the successor of poverty politics or policies (Atkinson & Davoudi, 2000) which are as explained connected to the economic dimension. Also European Integration was (and still is) dominated by economic integration. As a consequence economic policies were at any point in time far more developed on the EU-level than the social policies (Borragan & Cini, 2010) what may have the consequence that policy areas are often considered from their economic sides (Daly, 2006). This could be the same in the case of social inclusion. Therefore the first hypotheses is

1. The economic dimension will be the most important one from the beginning of the observation in 1989 and will stay so until 2013.

Activation measures and other Employment policies have become more important in tackling all sorts of social problems (Jessop, 1993; Jenson, 2010). It makes sense to assume that this increase will also apply to social inclusion. Moreover employment policies were often the precursors in European Social Policy like in 1997 when the EES was launched. and the Open Method of Coordination (OMC) for Employment is the OMC which is the most developed one in terms of coordinating member states. Both of this made a lot of progress from 2000 to 2005 (Heidenreich, & Bischoff, 2008; Ferrera et al, 2002). Therefore it is assumed that the progress made by the EU's employment policy spilt over to the employment dimension of social inclusion. Since 2005 is the year in which streamlining Policies became an outstanding feature of the EU's (social) policy design and growth and jobs became an even more important goal to the EU (Dieckhoff and Duncan, 2007; Copeland and Daly, 2012) the second hypotheses is

2. The employment dimension will gain more importance from 2005 onwards.

The knowledge-based society is a development only recognized by the EU in 2000. In that year the EU gave itself as mentioned the Lisbon Strategy in which the EU declared the goal to become the most competitive knowledge-economy in the world. The Lisbon Strategy put

issues of the knowledge-society on the agenda of the EU (Powell & Snellman, 2004; Brine, 2006). Therefore the third hypotheses is

3. The knowledge-based society dimension will only gain importance from the year 2000 onwards.

For the social and cultural dimension it is difficult to have an expectation because literature is undecided about its development, some argue that it will lose attention (Daly, 2008) over time others argue that it is constant but its meaning might change (Jenson & Saint-Martin, 2006). Also the overall Social Policy development does not support the building of an expectation. Before 2000 it seems difficult to determine a direction. While in 2000 social cohesion and related topics were central to the EU, what probably would support a higher attention given to the dimension, but 2008 can have caused a reversed trend.

3. Methodology

The thesis analyses the developments of social inclusion policies which are therefore the unit of analyses. In order to track these (possible) developments it looked at policy documents issued by the Council of the European Union which included plans or measures about overall social inclusion policies (so are not about specific single issues). So the units of observation are social inclusion policy documents of the Council. The documents were analysed using content-analyses by help of a content-dictionary. The single parts of the methodology are outlined below.

3.1 Sample

The data analysed was policy documents of the Council which are about social inclusion. The concept of social exclusion/inclusion was introduced to the European Union in 1989 (Ferrera et al, 2002). Since then a lot of documents published by the Council are about social inclusion, therefore it was a by far too large amount of data to use all possible policy documents. Furthermore a large part of these documents does not contain useful insight relevant to the research question. For this reason the sample only contains the most relevant documents. The most relevant documents are the ones in which a changes were expectable. In order to select the right documents literature about the topic provided arguments for selecting certain documents. So if scientific literature provided an argument why a certain document could be relevant to the thesis, the document was included.

Table 2: Documents included in the analyses

Document (social Inclusion)	Reason
Council (1989) 'Resolution of the Council and of the Ministers for Social Affairs Meeting within the Council of 29 September 1989 on Combating Social Exclusion', OJ C277 of 31/10/1989.	First Document on Social Exclusion/Inclusion (Ferrera et al, 2002)
Council (1992). 'Council Recommendation on common criteria concerning sufficient resources and social assistance in the social	For the first time the Council clearly mentions that it recognizes that social exclusion and poverty have become more multidimensional,

protection systems' (92/441/EEC)	also it is a major development towards the Open Method of Coordination. (Ferrera et al, 2002).
Council (2000). 'Contribution by the Labour and Social Affairs Council for the Lisbon Summit Labour and Social Affairs Council meeting on 13 March 2000 Presidency conclusions ('Lisbon Strategy')	Introduction of the social investment paradigm and the strategy should streamline European policies to fulfil the Lisbon goals (Cantillon, 2011).
Council (2005). 'Key Messages paper on Employment, Social Protection and Social Inclusion in the context of the mid-term review of the Lisbon Strategy` (part of re-newed Lisbon Strategy)	Follow up to the Lisbon Strategy in order to fulfil the Lisbon goals, it brought some adjustments (Dieckhoff & Gallie, 2007). Document points out all the social policy related issues in this regard.
Council (2008). Council Conclusions on common active inclusion principles to combat poverty more effectively.	Most important inclusion project of the year of the crises (Vanhercke & Lelie, 2012).
Council (2010). 'Europe 2020 Strategy-SPC Contribution' (Part Europe 2020 Strategy)	Overall streamline policy strategy for the EU from 2010 to 2020, quantitative poverty and social exclusion target as part of the overall 2020 goals (Copeland & Daly, 2012).
Council (2013). The Annual Growth Survey and the Joint Employment Report in the context of the European Semester: political guidance on employment and social policies.	Most important Document of the actual European Semester. Therefore is the most actual source about (overall) social inclusion policies

3.2 Data collection

The policy documents that were used were collected from the cost-free website eur-lex.eu. The Website is an official website of the European Union and entails most public EU documents. If a document could not be found on eur-lex it was drawn from the official website of the Council (<http://www.consilium.europa.eu/>), which is also cost-free.

3.3 Data Analysis

The documents were analysed with content analyses. This was done in two parts. The first used a content-dictionary about social inclusion which gave quantitative inside to data. The second part is a qualitative analyses of the documents. After both parts were done they were merged together.

The content-dictionary about social inclusion is subdivided among the dimensions about social inclusion. It includes words which are central to each dimension. The dictionary was used to code the documents. This was done with help of the content-analyses program Atlas.ti.

The first part counted the amount of sentences which include words of the content-dictionary in a social inclusion policy context. Meaning sentences were only counted if it is about social

inclusion and the dimension in question. The counts were assigned to the corresponding dimension, so that the dimensions could be compared. Further it looked at the counts with statistical measures a Chi-square test for homogeneity.

The Counts gave indication about attention and importance (to the Council) of a dimension. If a dimension has a high amount of counts it means that a lot of attention is paid to that dimension and it is relatively important to the Council if a dimension is mentioned less the opposite is true. Next to that more obvious consequence it was also assumed that the dimensions given the most attention to are the dimensions which are the ones determining the design of social inclusion policies. Therefore dimensions with (relative) high counts were the ones which composed social inclusion in the view of the Council

Part two interpreted the documents with help of the coding. It tried to understand how the dimensions are understood and how they are meant in the documents. This part assessed the document in terms of its relations between the dimensions and how it looks at social inclusion.

Afterwards the results of the two parts were put together. On that way the results were put in a wider context and add up each other.

The dictionary was created by looking at relevant scientific articles, they helped bringing up key terms to the related areas (Jessop, 1993; Gregersen & Johnson, 1996; Bhalla & Lapeyre, 1997; Midgley, 1999; Room, 1999; Artis & Buti, 2000; Scharpf, 2002; Visser, 2000; Peace, 2001; Rueda, 2006; Dieckhoff & Gallie, 2007; Daly, 2008; Vandenbroucke et al, 2012). Afterwards the oxford dictionaries was used to find appropriate derivatives and synonyms.

Table 3: Indexes of the Dimension of Social Inclusion Policies

	Dimensions	Indexes
Social Inclusion Policies	Economic dimension	Poor, poverty, sufficient income, adequate living standards, income support, anti-poverty , guaranteed minimum income, social assistance, material deprivation, financial exclusion,
	Knowledge-based society dimension	human capital, information society, knowledge, knowledge(-based) society, early childhood development, basic education, lifelong learning, ICT, life cycle, social investment, life course, active aging,
	Employment Dimension	labour market, employment, unemployment, working conditions,

		labour supply, active labour market policies, ALMP, activation, employability, job-seeker(s), incentive
	Social and Cultural Dimension	Fundamental (social) right(s), quality of life, diversity, intercultural, culture, quality services, social cohesion, dignity, wellbeing,

3.4 Limitations

Unfortunately no effective way to collect documents in regular intervals was established. This produced the risk of a biased sampling. Another problem was that counting words always bears the risk of missing messages ‘between the lines’. Also a concept-dictionary is always a potential source of errors, since the risk of including or excluding the wrong words is a threat which can hardly be completely excluded. For this reason the qualitative part used a different approach to analyse the documents to ensure that the shortcomings of the quantitative part are addressed.

4. Analyses

This part looks at the documents and tries to give more insight to the Documents in the way described above. First it is looked at the counts of the documents then it should look at the coded documents and explain them more detailed.

4.1. Description and Analyses of Counts

Table 4: Counts of Dimensions in the Documents/Year

Dimension/Year	1989	1992	2000	2005	2008	2010	2013	Sum
Economic dimension	2	13	4	8	15	16	14	72
Employment dimension	2	2	8	10	12	7	13	54
Knowledge-based society dimension	0	0	8	10	2	1	3	24
Society and Cultural dimension	2	11	6	5	10	10	10	54
Sum	6	26	26	33	39	34	40	204

Due to the low counts the cell frequency condition for a Chi-square test can only be fulfilled for the years 1992-2013 excluding the knowledge-based dimension. A Chi-Square test of homogeneity with H_0 : “*The distribution of counts is homogenous over the observed time*” and H_a : “*The distribution of counts is not homogenous over the observed time*”; gives a X^2 of 11.37 by 10 degrees of freedom. This results in a probability of 32.94% that H_0 is true by observing this distribution of counts.

This percentage is not low enough to reject H_0 therefore H_0 cannot be rejected. For this reason it is very difficult to make statement if the distribution between the dimensions changes over time or not. Since the total number of counts of the documents is very different and the number of counts of the single dimension per document is relative low further tests probably cannot give helpful insight.

This means that the counts do not give enough evidence to conclude that there is a change of emphasis in social inclusion policy over the time period. So the counts gave an overview how the dimensions developed over time but it did not show if there is alteration in the attention given to the dimensions.

The statistical test may not have helped to find answers to the research question but the counts can still give a few indications about the expectations. The first expectation expected that the economic dimension to be the most important from 1989 until 2013. Regarding that it can be said that the economic dimension looks like the overall most important one but it does not stay so because in 2000 and 2005 it is the dimension with the third most counts only.

The second expectation that the employment dimension will gain more importance from 2005 onwards cannot be confirmed. The times it was mentioned fivefolded between 1992 and 2005 and afterwards the numbers steadily rose with exception of 2010. But the numbers show that the significant rise already happened in 2000 and rose afterwards only moderately. Therefore can 2005 not be seen as the year the employment dimension got an attention push.

Confirming expectation three that assumed that the knowledge-based society dimension will only gain importance from the year 2000 onwards seems to be a little difficult. Even it only came to attention in 2000 loses a lot of its attention in 2008. That raises the question if 2000 and 2005 were the only years which really gave attention to it.

In the expectation part it was not possible to make a prediction about the cultural and social dimension but the observation in terms of counts about it should be shortly summarized. It gains quite a lot of attention and in overall counts it is tied with the employment dimension on the second rank. Next to that it is interesting that the amount of counts is until 2005 relatively inconsistent and after that perfectly consistent.

In summary this chapter did not offer evidence that the proportion of attention given to the dimension differs in the observed years. Nevertheless it gives some indications regarding the expectations made in 2.3. While the counts indicated that expectation 1 and 2 are true, they gave mixed signs regarding expectation 3.

To what extent these answers hold true can maybe be seen after the next part.

4.2. *Analyses of the Documents*

This part looked at the coded document and analysed them. One main issue was the development of the dimension of social inclusion but it will also look at other points that will help to understand how the Council looks at social inclusion policy at that point in time.

1989— *Resolution of the Council and of the Ministers for Social Affairs Meeting within the Council of 29 September 1989 on Combating Social Exclusion*

The very first document about Social Inclusion is an acknowledgement that the problem of social exclusion exists and a declaration of intent to do something against it at a later point in time. While the economic dimension of inclusion policy is mentioned and clearly a part of the Union's concept, social inclusion is mostly seen as a problem of integrating or giving people access to the labour market and social services (Council, 1989 p. 1(3, 6. and 7.)).

It is stated that “*social exclusion is not simply a matter of inadequate resources*” (Council, 1989 p. 1(6.)) like poverty in a classical sense is mostly understood. The EU focuses in the document on measures of the social and employment dimension. This is visible because the Council primarily asks the Member States to increase its efforts to integrate people into the labour market or give them access to the social services they need to be a part of the general society (Council, 1989 p. 1(7.)).

The document is with one page a quite short document and reading makes it clear that it is a first document on a policy which should be developed and extended in the future. It looks as if the Council plans to introduce a policy dimension which is next to the economic integration and should emphasise the social (Council, 1989 p. 1(1.)). This can be a result of a stronger implicit emphasis on employment and the ‘social and cultural’ dimension and in its introduction in which the will and effort in this regard are highlighted.

1992- *Council Recommendation on common criteria concerning sufficient resources and social assistance in the social protection systems*

This document established a common ground for the diverse social protection systems all over the EU at that time. It laid out how the right to social assistance should be recognized and set some guidelines how social protection should be organized in the European countries.

Next to that it also brought some interesting developments in terms of social inclusion. Standing out is that in the document social inclusion is the main goal social protection should fulfil. Already in the preamble social exclusion is several times mentioned as the problem social protection systems need to tackle (Council, 1992, p.1). The operational part recommends the Member states to ensure that social protection and assistance is a “*comprehensive and consistent drive to combat social exclusion*” (Council, 1992, p.2). Consequently most recommendations refer to minimize excluding situations granting people access or integrating them into general society. In addition this document clearly acknowledges the multidimensionality of social exclusion as a social problem and therefore social inclusion as a policy field (Council, 1992, p.2-3).

The document is largely centred on the economic and ‘social and cultural’ dimensions of social inclusion. The most important measures suggested to the Member States are income guarantees or ensuring sufficient resources and satisfy people’s specific needs, which are measures (Council, 1992, p. 2-3) which can be mainly attributed to the economic and ‘social and cultural’ dimensions. The document also entails measures of the employment dimension like “*safeguarding an incentive to seek employment*” (Council, 1992, p.3), employment is not an important theme. The economic dimension deals a lot with the issue of guaranteeing people sufficient resources, these sufficient resources should be adjusted to individual needs of every person. So the Council recommends a relative individualized approach to social assistance (Council, 1992, p.2). Related to that is the other issue regarding that dimension which is poverty. Fighting poverty is seen as an important part of social inclusion but (at least to some extent) an independent policy domain. So poverty gets among all the measure special attention like own recommendations or programs to which is referred to in the document but in this document. Anti-poverty measure are seen as important support for social inclusion but not as a inclusion measure as such since it is referred to it as something that is done relative independent of social inclusion policy and should be coordinated with it (Council, 1992, p.1-2). While this seems to be diffuse it should be noted that combating poverty was at that point in time nearly a sole responsibility of the Member States while social inclusion was more prominent on the EU level (Berghman, 1997).

The social and cultural dimension in this document adds up to the economic dimension. It deals to a great extent with ensuring social rights and human dignity of the person. The dimension tries to satisfy needs people have next to their economic needs. This approach may be related to what was agreed in the Maastricht Treaty which was the first treaty of the EU which fully acknowledged the fundamental rights (Smismans, 2010).

This can be said about the whole document. The Council tries to find a balances approach which should satisfy financial needs (which are maybe measures it could influence at best) but also should make sure that social inclusion policy is not one dimensional by using the social and cultural dimension and stating the multidimensionality of social inclusion to ensure awareness.

2000 Contribution by the Labour and Social Affairs Council for the Lisbon Summit Labour and Social Affairs Council meeting on 13 March 2000 Presidency conclusions

This document includes the social policy part of the Lisbon strategy which got the Union ready for the challenges of the new century over the next decade. Next to the goal of economic stability and progress the strategy should contribute to the wellbeing of European citizens and ensure Europe adapts to globalizations and technological progress.

Of course the part which is of special attention to the project the one about social inclusion. The headline already declares it a “*top priority*” (Council, 2000, p.4). The Council declares that it has three approaches to social inclusion the first is about investing in people skills and to anticipate changes in the economy in order to prepare the workforce for that, this is about social investment and therefore introduces the knowledge-based dimension to social inclusion policy of the Council (Council, 2000, p. 1 and p. 4).

The second one is about ensuring that social protection systems help people which are for a longer timeframe without a job to have a decent life (Council, 2000, p.4). This approach is a mix of the economic and ‘social and cultural’ one, both seem to be implicitly addressed here. To some extent it is about making sure that people do not lose contact to society, the rest is about making sure that people are adequately equipped with resources to live on their own in that society.

The third approach is about making sure that people can get integrated into society at community level these integration measures are related to employment, education, health and housing (Council, 2000, p.4). Although the approach is largely about the social and cultural dimension due to its approach to integrate people into the local community it of course touches the employment dimension also.

As the three approaches already indicate it can be observed that the dimensions get more intertwined with each other. The Council seems to start looking for measures which are at the overlap of two (or more) social inclusion dimensions. Part of this is also the plan to better intertwine inclusion policies and the Unions employment strategies and in a broader context the forth part of the whole document which is all about the “*dovetailing of existing processes*” (Council, 2000, p.5). Also notable is that the document refers not very much and explicitly to the economic dimension. Only in the introduction it really looks at the economic part of social policy, while it is nearly not mentioned in the social inclusion part except in the second approach (Council, 2000, p.1). The Council planned to integrate the parts of social inclusion which are non-economic issues by keeping the economics separate from it. As mentioned above the knowledge-based dimension is introduced in the document. The Council used it mostly as a frame which is about developing the European knowledge-based society.

The document brought a lot of progress to the social inclusion policy of the Council. Social Inclusion policy should be one of the policy fields that help the Europeans to improve their living conditions by enabling everyone to be part of the economic progress the Union made, so it should help to add a value in measures growth of GDP cannot. Also it starts to integrate the dimensions into each other.

2005 Key Messages paper on Employment, Social Protection and Social Inclusion in the context of the mid-term review of the Lisbon Strategy

This document was meant to review the progress of the Lisbon Strategy and look how it needed to be adapted to make sure its goals would be reached.

One progress which was made since 2000 is to better integrate the employment strategy into social inclusion policies (Council, 2005, p. 4 and p. 8). The part of the document which is about social inclusion as well as the introduction contain a lot of related content, notable that social inclusion policies are not well integrated into the part about employment policies. For that reason it is not a merge of two policy areas but more an indication that the employment dimension got more important. Employment is a “*key driver of the modernization of social protection*” (Council, 2005, p. 6). The increase of importance also holds true for the knowledge-based dimension which got more important to social inclusion and overall social policy (Council, 2005, p. 2, 6 and 7). Especially the lifecycle approach has become a key idea

to which social protection should be adjusted to. Also the two dimensions got deeply intertwined in most paragraphs they are just together and should add up to each other.

The rising attention to those two dimensions led to a decrease of attention to the social and cultural dimension. The homeless, ethnic minorities and improving social services are still declared to be important but the main course of action should be in the employment and knowledge-based dimension (Council, 2005, p. 2 and p. 6-8). The Council emphasizes streamlining of different areas but it actually looks like it plans to mainly make use of the employment and knowledge-based dimension in order to fulfil all goals.

An important change is that the social problem of social inclusion policies is not anymore social exclusion, but now it is “*poverty and social exclusion*” (Council, 2005, p. 3). Therefore it can be said that the problem of social exclusion is now seen more in an economic context because poverty is related to the economic dimension. This could lead that social inclusion policy now implicitly focuses more on economic needs since the main focus of social inclusion shifted to a more economic problem. Next to that it can be said that the two as such different concepts approximate in their meanings while poverty in 1992 was a problem that was a factor for social exclusion and the combating poverty was to some extent an independent policy task, now social inclusion is responsible for combating both social exclusion and poverty.

So this document took the streamlining which was envisaged at the start of the Lisbon Strategy forward. Initiates of the employment and knowledge-based dimension are dominant which may have been caused by the fact that both can be related to other social policies which are important to the Council, first of all employment policies.

All in all the document progresses in many aspects the development of social inclusion as envisaged in the Lisbon agenda. It tried to broaden inclusion measures to as many extends as possible via streamlining what made the social and cultural dimension look less important but it is more outsourced to other policy domains and the introduced knowledge-based dimension becomes more important what could help social inclusion to progress the knowledge-based society.

2008 Council Conclusions on common active inclusion principles to combat poverty more effectively

This document was in written light of the financial crises and how the Unions social inclusion policy was adjusted to that very problematic situation. The title of the document (Council, 2008, p. 1) might make one assume that social inclusion policies now should be subordinated to fighting poverty and become purely a policy focusing on economic measures and needs. But this does not hold true in it's entirely.

Poverty is a central issue in the document but it is not a pure anti-poverty policy document. The issue became even more important due to the economic situation (Council, 2008, p. 3). But as the title also says the document is about active inclusion which is for the council “*a combination of adequate income support, inclusive labour markets and access to quality services*” (Council, 2008, p. 3). Ensuring that people are active is a main issue of the

document. This means that people should be encouraged to act by themselves and not just receive just passively benefits of certain policies (Council, 2008, p. 3-4).

The idea to keep people active is especially related to the employment dimension. Basically the Council pursues the strategy to make employment more attractive (Council, 2008, p.5). In the document the Council displays this strategy as two folded on the one side it incentives to take up (any kind of) employment should be increased by making sure that employment guarantees a higher income than social assistance and on the other employing people should be as inexpensive as possible for employers this should increase the demand of workers and help especially the low qualified workers. The second way should ensure the fundamental right to work and make sure that the low qualified are not excluded from the labour market (Council, 2008, p.4-5). The core of active inclusion with regard to the employment dimension in this document should be the spread a workfare approach and put workfare more at the centre of inclusion policy since it mainly focuses on bringing people into any kind of employment and making them take it up.

This document gives now again more attention to the social and cultural dimension than in the two former documents. It focuses on the ones not having work or the ones excluded from the labour market. They should be guaranteed social services that “*ensure dignified living conditions*” (Council, 2008, p. 4). But the dimension has next to that various goals. The Council also wants for instance ensure conciliation between work and family life (Council, 2008, p. 5). Nevertheless most of the dimension is related to the employment dimension. The streamlining of the dimension has not stopped or reversed but the social and cultural dimension is now more distinct and diverse again. Additionally a sign of active inclusion can be found in this dimension. It is referred to the spread of social participation; participation is of course more than just being part of society because it is an active way of being in a society (Council, 2008, p.3).

For the knowledge-based dimension the opposite is true. It is now less distinct and does not get much attention. It is not recognizable and only a short addition to the employment or economic dimension. The economic dimension receives a real push. Now it is the determining dimension of the document. The fight against poverty is as mentioned a central theme of the document and income support is in the document one of the most important tools of social inclusion (Council, 2008, p.1 and p.6). It should be noted that income support or other forms of financial assistance should always be balanced with budgetary constraints, so the adequate income support should always be oriented at what the budget allows (Council, 2008, p.3-4).

It seems adequate to say that this document is a shift in focus in the social inclusion policies of the Council. Social inclusion should now ensure activity of people and is now dominated by the economic dimension especially the fight against poverty. The employment dimension is still central to the Council inclusion policy but for a different reason, in this document it was the main tool to ensure activity. While the social and cultural dimension seems to have become more important it is now more subordinated to the economic and employment dimension but is strongly used to justify the domination of the two. This document changes the Council's inclusion focus to workfare and anti-poverty measures with some additions from the wider range of inclusion measures.

2010 Europe 2020 Strategy-SPC Contribution

Similar to the Lisbon Strategy the Europe 2020 Strategy is about developing the EU over the next ten years. This document is what the social protection committee contributed to it.

By looking into the document it directly strikes the eye that the Council has decided to impose a quantitative target on the reduction of social exclusion and/or poverty (Council, 2010, p.3). The Council has decided on three main indicators which should determine the level of social exclusion and/or poverty. The first is the *risk of poverty* rate determined by the amount of people having less than 60% of the national median income, the second is the *material deprivation* rate which is a non-monetary measure of poverty and therefore measures a (non-monetary) lack of resources and the third is the proportion/amount of *people living in jobless households* which looks at households with very low work-intensity over a whole year (Council, 2010, p.3-4).

As the measurement of social exclusion already indicates is social inclusion policy of the Europe 2020 Strategy dominated by the economic dimension. This starts with the fact that poverty and social exclusion have approximated even more in their meanings. They seem to have become at some points interchangeable, this becomes visible in the goal to lift people out of poverty or social exclusion (Council, 2010, p.3). Or still leaves the choice between the two what either means that the Council is still unsure about its goal or that it does not matter to much which term you use because they are basically understood in the same way. In the document are also other passages where poverty and social exclusion are completely interchangeable even though it does not apply to all of them (Council, 2010, p.5-7). Next to that the Europe 2020 Strategy integrates the economic and social inclusion policies more closely, in a way that the strategies in the both areas refer to each other and support each other, the Council uses for this close relation the term "*inclusive growth*" (Council, 2010, p.2). In the introduction the Council states that inclusive growth should be phrase which should lead the 2020 Strategy, due to what is known about the term growth the term gives the strategy an economic appearance especially since inclusion policies are anyway aiming for the inclusive.

The Council plans to ensure due to the stronger coordination of the policy areas to make them support each other (next to social inclusion and economic policies, employment policies are part of this plan) (Council, 2010, p.2 and p.6). Next to fighting the lack of resources the economic dimension is concerned with promoting participation in the economy, what means that everyone should be encouraged to take up economic activities and become an active market-participant (Council, 2010, p. 6-7).

The employment dimension is also next to the fight against unemployment all about ensuring a high participation in the labour market. So it should not only be ensured that everyone has a job who wants or needs one, but to encourage everyone to take up employment (Council, 2010, p.7). Also the social and cultural dimension has one focal point on participation. The term of integrating people into society is much less prevalent than before, it has largely become replaced by participation in society what requires as explained above more activity by the people (Council, 2010, p.7). The next central theme of the dimension are the social

services. It is planned that the social services should now support the economic and employment dimension more. Their working should be directly beneficial to what is needed in the labour market and should support the efforts made in the employment dimension as well as they should be beneficial to economic participation (Council, 2010, p.6-7).

The knowledge-based dimension is given less attention in the Europe 2020 Strategy. Only a few short references are made to it. But it should be noted that the idea of social investment which is related to that has spread, the outcome of health and long-term care should support people to be more independent and to participate. The idea is that these initiatives should be “*providing social cohesion*” (Council, 2010, p.7) and help people to be part of society and the labour market (Council, 2010, p.7-8). This is a social investment approach which focuses more on social inclusion than on human capital development because it mainly tries to ensure that people are part of mainstream society and not centres around skill development. If that is purely related to the knowledge-based dimension is not definitely, but it gives indication that it implicitly still matters.

All in all the Europe 2020 wants to make people participants in all realms of social inclusion. Next to that the dimension has become more streamlined but this seems to have led to a dominance of the economic dimension. Inclusion policy is now done under the heading of inclusive growth which already gives the policy area an economic sound.

2013 The Annual Growth Survey and the Joint Employment Report in the context of the European Semester: political guidance on employment and social policies.

This document is about the Council’s plans for the first half of 2013 and how it plans to implement the Europe 2020 Strategy. The Council emphasizes the importance of dovetailing policy areas (economic, employment and social inclusion), especially to ensure economic stability.

The Council makes clear that social inclusion policies should be coordinated with economic and employment policies (Council, 2013, p.2 and p.8). The key topics of the economy part are (growth-friendly) fiscal consolidation and the restoration of the lending economy (Council, 2013, p.3-5). The main topic for the employment policies is reducing of long-term unemployment and youth unemployment as well as a job-rich recovery. Notable is that the employment policy part indicates how the other two areas could support these goals but the economy part does not do so (except indicating for cost reduction) and it is unclear how a coordination should look like (Council, 2013, p.3-6).

The coordination builds the frame for inclusion policies in this document. Also the increased focus on coordination has led to a further integration any approach related to one dimension also refers to one of the others.

Four major policy approaches are proposed. The first is about “*implementing active inclusion strategies with particular attention to income support, access to services and inclusive labour markets*” (Council, 2013, p.8), this approach just recalls attention to what has always have been a main focus of inclusion policies by giving focus to ensuring activity of people like it has been introduced in 2008. Approach two is a “*better use of social protection systems to*

improve long-term adequacy and sustainability, access to high quality services, and to reduce income inequalities” (Council, 2013, p.9). This does not contain anything which is new as such, but this document is the first that states long-term adequacy and sustainability as a main priority in others it was mentioned but never at a key position. Also this is the clearest statement that social protection should contribute to those two issues. This may imply that social protection (in an inclusion context) should now contribute to long-term adequacy and sustainability. Those two statements could have many meaning but since they are often discussed in the context of finances and budget (Council (2), 2008; Cox & Béland , 2012), that means that social protection is not only more limited but by constrained budgets but must be designed in a way that they work cost-effective. The third approach aims at a *“better protection against the effects of structural adjustment for those in the most vulnerable situations”* (Council, 2013, p. 9). Also this is not new but has gained more attention due to the structural adjustments in some southern European countries in context of the currency crises (Steinbach, 2012). Approach four is about *“measures promoting gender equality, implementation of gender mainstreaming and anti-discrimination, equal opportunity, and solidarity between generations”* (Council, 2013, p. 9). This is a similar situation as in approach two, fulfilling gender equality as well as intergenerational solidarity was mentioned in nearly all of the documents but this one gives it a more central role. The choice to promote this approach can have many reasons and can be a goal just in itself but in context of the document and former inclusion efforts another reason seems more likely. Gender equality and intergenerational solidarity is interpreted in a sense of making sure that everyone should have equal opportunity in any kind of market. Ensuring equality supports the Councils plans of a ‘participatory society’. Giving women equal chances enables them to participate them in the economy or labour market and intergenerational solidarity can also mean that the old unburden the younger ones by working longer and not (yet) receive pensions. That also contributes to balanced budget.

In terms of the dimensions there are hardly developments observable. Next to that it stands out that social inclusion policy in the document gets devoted as indicated above to economics. The Council uses the streamlining of economics, employment and inclusion policies, to devote the last ones to economics. This can be seen at two things. Economic challenges are in the social policy document quite explicitly stated but social problem are mostly referred to as social consequences of the crises and social inclusion measures are only described very broadly what makes a functioning inclusion coordination difficult (Council, 2013, p. 9).

All in all in this document social inclusion policy as such falls a little short and follows economic reasoning. It is unclear how the Council now looks at the dimensions and to what extent they should be integrated into each other because the social inclusion part is compressed between the economics.

Table 5: Attention to dimensions per year according to the qualitative analyses

Dimension/Year	1989	1992	2000	2005	2008	2010	2013
Economic	middle	high	low	low	high	high	high
Employment	high	low	middle	high	high	middle	middle
Knowledge-	none	none	high	high	low	low	low

based							
Social and Cultural	high	high	high	low	middle	middle	middle

4.3 About the expectations

This part should shortly evaluate the expectations made in the framework part.

The three expectations were:

1. The economic dimension will be the most important one from the beginning of the observation in 1989 and will stay so until 2013.
2. The employment dimension will gain more importance from 2005 onwards.
3. The knowledge-based society dimension will only gain importance from the year 2000 onwards.

The economic dimension looked in 4.1 like the dominant dimension which was mostly determining social inclusion policy. The qualitative part does change this to some extent and allows for some differentiation. In the time period between 1989 until 2005 the economic dimension were balanced by at least one of the other. The Council developed a social inclusion approach which was designed to satisfy the demands of multiply dimensions as well as one which is next to economic policy. While in 2005 a first change with regard to the economic dimension was observable, the Council started referring to “poverty and social exclusion” and not solely to social exclusion (Council, 2005, p. 3) a shift happened in 2008. From there on the economic dimension became integrated into economic policies and the economic dimension became the one which all others got subordinated to. So while in the first period the economic dimension was the most “spoken about” dimension it became the one actually dominating policy design.

The counts did not suggest that the second expectation is true. The qualitative analysis supports this but it looks a little different. The counts point at 2000 as the pivotal year the qualitative analyses suggests 2005. This is relatable to the development of the EU’s employment policies. In 2000 the European Employment Strategy was since 1997 in place and made the employment the most developed social policy area, but it was not integrated with other policy areas yet. Five years later the Employment policies were further developed on the EU level and were further integrated into other social policies (Heidenreich, & Bischoff, 2008), what can have caused a stronger overlap also in terms of discourse and eventually gave the employment dimension more influence in the overall social inclusion discourse. In 2010 the relative high importance of 2005 declined. So the attention given to the employment dimension indeed rose in 2005 but it did not stay on that level.

Assumption three is as indicated above a special case because it loses quite some attention in 2008, but nevertheless the assumption can be confirmed. It does never lose all of its attention and recovers even a little. The relative loss around 2008 may be relatable to the financial crises which constrained the budget and urges governments for short term actions, since social

investment approaches are more long-term project (Vandenbroucke & Vleminckx, 2011) this might have led to a shift of preferences away from the knowledge-society dimension. This assumption is supported by the fact that this dimension recovered a little later on.

5. Conclusion

This thesis analysed change in emphasis of the Council of the European Union in terms of social inclusion policy over time. The thesis looked at policy documents with a two-folded approach the first was counting sentences which were directed at one dimension of social inclusion in the documents, the second was to analyse coded documents.

The dimensions of social inclusion all not developed linear. What means that overall the Council's social inclusion policy cannot have developed linear. Nevertheless it is possible to see some trends from the two analyses parts. Merging the two analyses parts together it appears that there were two bigger turning points during the development.

The first is the year 2000 in which for the first time the knowledge-based dimension was introduced which added an aspect to social inclusion in the EU. From that year onwards the EU the uneducated and people at the losing end of technical revolution were objects of social inclusion Policy. In addition social investment and other strategies related to the knowledge-based dimension were added to the pool social inclusion strategies the EU has. Also 2000 was the year the employment dimension started gaining more attention. The year 2000 is not only an important year for social inclusion but as mentioned for the whole EU due to the Lisbon Strategy. It introduced among others the OMC and the goal of the knowledge-based society to the EU. For this reason it is assumed that the Lisbon Strategy was the reason for this development.

The second turning point is the year 2008 which broad a drastic change in the emphasis on social inclusion. Before 2008 the Council tried to develop a social inclusion policy which used a multi-facets approach. This approach gave attention to all four dimensions and tried to solve problems which are connected to the dimensions. In this approach the economic dimension was unlike expected not the dominating dimension, but the approach balanced the dimensions at least to the extent that the economic dimension was balanced by the others. The social and cultural dimension of that inclusion policy approach got more and more outsourced in other related policy areas especially in 2005 which made look unimportant but let to the result that also other policy areas followed an inclusive logic.

The social inclusion policy which started to develop in 2008 focuses very strongly on economic aspects of social inclusion especially the fight against poverty. This has become that central that fighting poverty and social inclusion nearly have become synonyms. Next to that this new development really tries to ensure the activity of people, they should now only be integrated into society but participate in it. Also the Council demands quite strongly from that kind of social inclusion policy to be cost-effective, so to spare the budgets from unnecessary burdens but if possible even help to balance it. The social and cultural dimension in this type is often used to give more justification to the poverty and inclusion policies and to add a little bit up to them.

This change occurred during the financial crises which constraint budgets and made massive efforts to revitalize the economy necessary. Furthermore it often made policy makers put the economy first (Buckley & Howarth, 2010). The 2008 approach noticeable complies with the necessities of the financial crisis what suggests that the financial crisis could be an important factor for that change but more concrete evidence could not be found. Therefore it can be assumed that the financial crisis is a factor in the change of social inclusion policy but it cannot be presented as the reason for it.

All-in-all it looks like that social inclusion policy is determined by overall EU (social) policy developments. The years 2000 and 2008 had influence a lot of policy areas and social inclusion was one of them. While the dimensions changed over the years and developed following trends their independent development may be bound to limited. So the Council's social inclusion policy is not a policy area which is independently developed. Its development is largely bound to overall events and the Council's overall agenda. What means that the emphasis in inclusion policy changes when the overall policy focus changes.

This thesis looked at the development of social inclusion policies in the European Union and contributes to the body of literature in two ways. First it looked at the development of social inclusion policy until 2013 what has been rarely done yet; most articles stop around 2008 or look at single developments like the 2020 target. Secondly it analysed how the setting of priorities in social inclusion policy changed over the years.

Lastly it should be indicated which further research can result from this thesis. One issue worth observing is if social inclusion policy develops to a pre-2008 inclusion policy while the economic crisis ends. This could show if the financial crisis caused the change in social inclusion policy or not. Also it could be looked at to what extend a high attention given to a dimension influences the related policy areas. Thus future research could analyse if social inclusion policy can influence policy areas or if it is only influenced by developments in other areas.

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