

STUDY PROGRAMME IN EUROPEAN SPATIAL PLANNING:

THEME 1.3: INDICATORS FOR SOCIAL INTEGRATION & EXCLUSION

FINAL REPORT

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by

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1 REFLECTING THE SUBJECT MATTER

1.1 Background

There is increasing policy concern about issues concerning social integration within the European Union in general. In member countries rapid changes in the social conditions can be observed. Increasing social and economic gaps are emerging between various groups of the population. While some groups are benefiting from the increasing economic and cultural integration within the European Union, others face increasing difficulties. For substantial groups of citizens the last few years can be described as a vicious circle that is successively taking them into social exclusion. There are many explanations for this development. The recession in the early 1990s brought about not only structural changes of the labour market. It also led to constraints on public finances and subsequent radical changes of social welfare programmes and social conditions in the countries in the European Union.

The EU has recognised the dangers of increasing social divisions and social polarisation as well as the necessity for measures to increase social cohesion and to reintegrate excluded groups:

„The Community cannot be satisfied with a ‘two-speed society’ breeding, as it cause, poverty, exclusion and frustration. The single frontier-free market and monetary union constitute growth factors for Europe as a whole, but they are also risk factors for the weakest regions and social groups and must be accompanied by more dynamic policies in the field of economic and social cohesion....“ (CEC 1992).

„The starting point for future urban development must be to recognise the role of the cities as motors for regional, national and European economic progress. At the same time, it also has to be taken into account that urban areas, especially the depressed districts of medium-sized and larger cities, have borne many of the social costs of past changes in terms of industrial adjustment and dereliction, inadequate housing, long-term unemployment, crime, and social exclusion.

The twin challenge facing European urban policy is therefore one of maintaining its cities at the forefront of an increasingly globalised and competitive economy while addressing the cumulative legacy of urban deprivation. These two aspects are complementary“ (CEC 1997).

Thus, there is a common understanding of the seriousness of the social problems we are facing and also about the need for urgent action. The problem of polarisation and social exclusion is a consequence of both inter-regional and intra-regional processes. There exist a lot of feedback processes, which tend to reinforce the polarisation tendencies both at the national, regional and local levels. Before discussing combating social exclusion, some observations about the processes behind polarisation and social exclusion – both at inter-regional and local level - will be discussed.

1.2 The Concept of Social Integration

Growing relevance

Combating social exclusion is nowadays mentioned in many documents analysing current societal processes in Europe and putting forward suggestions for progress in economic, environmental, or social development. The introductory chapter has also shown some consequences of disintegration processes and growing disparities between and within regions, between social groups or individuals.

The growing relevance of social integration as a policy challenge can be attributed to a number of reasons:

- Democratic societies are more and more confronted with decreasing credibility if authorities are not able provide appropriate living conditions and social peace for the majority of people and prevent (or reduce the risk of) marginalisation and exclusion.
- Marginalisation triggers off social tensions and leads to an inclination for radical solutions.
- It is also a matter of cost-effectiveness. Managing social tensions, rehabilitation of social stability and re-integration of individuals or groups once excluded costs by far more than keeping a social balance in the first place.
- Regions with a high degree of disintegration may also suffer from lower competitiveness.. They run the danger of getting involved in a vicious circle of decreasing attractiveness and increasing disintegration.

Integration as a matter of policy

Demographic development, changes in labour-market structures or migration movements impose heavy pressures on policy making. Nevertheless, it is not the fact as such that causes exclusion or disintegration. For example, problems of out-migration in remote regions, restriction of innovation, concentration of wealth/poverty etc. are not caused by ageing or migration processes. They are triggered by the treatment or esteem of elder people, unemployed, enhanced by employment-, education-, or migration policy. The growing awareness of the problem also within the community concerned with spatial development is a first step towards policy change. To develop tools in order to give a picture of the status and dynamic might provide a basis for a policy change.

Documents dealing with social integration issues frequently end underlining the shortcomings in available information, the lack of a theoretical basis and suitable indicators. Although we acknowledge the necessity within this study program to produce at least some preliminary results and to come up with suggestions and not only analyse and criticise the theoretical and methodological gaps the indicators and recommendations put forward in this paper has to be seen as a starting point for further development of the topic. Even more the preliminary results should prove the need for further research on the subject matter.

1.3 The Notion of Social Integration

At the moment generally accepted definitions of social integration for policy purposes are not available. Within the debate on social problems and social policies there are several lines of argument with very close connections to the notion of social integration, i.e. poverty, inequality, segregation to name only the most important ones. It is often hard to distinguish these concepts. Arguments and even statistical evidence frequently are useful for all of them. Nevertheless, for the sake of clarity and it is necessary to separate social integration from other concepts that also touch the problem of inhomogeneity of society with considerable consequences for individuals and social groups. Poverty for example appears to be not just the other side of social integration but it may serve as one indicator describing a certain degree of social integration. Within the poverty discussion the shift from resource-based approaches to a multi-dimensional understanding is of great importance for the notion of social integration.

Defining social integration encounters the additional problem of dealing with personal (subjective) awareness beyond statistical evidence. There may be a difference between the objective (?) fact of exclusion on the one hand side and - on the hand side - to feel excluded. This leads to the problem of the reference frame of integration and who defines it.

The concept of social exclusion was introduced in an institutional context by Jacques Delors in the 1980s and derives from the French Government's aim to develop French social policy in that period. Today the use of the concept is widely spread throughout Europe. We argue that the introduction and use of the concept is more than merely a rephrasing of traditional concepts such as segregation, poverty and underclass. Poverty and underclass have been used as concepts to characterise the situation of disadvantaged neighbourhoods. They were often used to describe a situation that could be considered a transitory accidental situation, i.e. one may be poor today but better off to tomorrow, since there are mobility processes that can improve the situation. With the concept social exclusion is different. Social exclusion implies that some social groups are cut off from this possibility. Exclusion refers to processes and definitions of social problems in a negative and underprivileged way (Lindén, 1999).

Recent years of European social development show that the concept has substantive content. In contemporary Europe it comprises a new way of analysing and combating social injustices (Cameron and Davoudi, 1998; Atkinson, 1998; CEC, 1992). Thus, social exclusion refers to processes of social deterioration and puts focus on vicious circles of decline.

Thus, during the course of the 1990s the significance of the concept social exclusion has deepened. This development is discernible from two perspectives. First it seems commonly recognised that social exclusion is not merely a specific single problem. Being poor, or unemployed, or belonging to an ethnic minority group living in a segregated neighbourhood are not conditions that, in isolation, provide evidence of social exclusion. Individuals can,

despite these hardships, very well be part of a mainstream society. Having rich networks of relationships and taking part in a wide variety of social activities, individuals can have rich social and cultural lives. The absence of these networks, however, increases their risk of being isolated and excluded.

The other feature, which makes the concept social exclusion distinct in comparison to previously, used concepts, is the strong emphasis on process rather than condition. Thus, privations of specific social or economic conditions do not necessarily mean that an individual or a group of individuals is excluded. However, it means that they become more vulnerable to social exclusion. Hardship in some dimension of life means a risk of entering a process that leads from integration to isolation and exclusion (Madanipour, Allen and Cars, 1998)

The European Commission sums up the difference between poverty and social exclusion as follows. "The concept of social exclusion is a dynamic one, referring both to processes and consequent situations.... More clearly than the concept of poverty, understood far too often as referring exclusively to income, it also states out the multidimensional nature of the mechanisms whereby individuals and groups are excluded from taking part in social exchanges.... it even goes beyond participation in working life: it is felt and shown in the fields of housing, education, health and access to services..." (CEC, 1992).

The definition given by CPS (1998) 98//31/2/EN may be a useful starting point for a definition of social integration in the context of this study programme also: "Society recognises social exclusion risk when it accepts that individuals and groups are dissatisfied with their current situation and role in society, and are unable to bring about sustainable improvements due to lack of means and confidence, and/or because of discrimination". As mentioned above, social integration is not automatically the other side of the coin with respect to social exclusion. Social integration refers thus to processes getting individuals, households and social groups included on social arenas e.g. labour and housing markets, and participation in political processes on various levels (Lindén, 1999).

In order to develop further the indicators suggested in this paper step by step the process of clarifying the theoretical and methodological background could include:

- The debate on poverty, inequality or segregation has to be examined in order to intensify the understanding of social integration and identify less appropriate arguments.
- The distinction between mechanical (referring to the structure of a system and as a measure of internal homogeneity) and organic integration (referring to the flows between members/groups of a system and as a measure of intensity of relations between sub-systems). The distinction is necessary because to improving the level of mechanical integration not necessarily means an increase of organic integration and vice versa. For Durkheim the mechanical 'solidarity' was based on similarities between the actors in a group and the organic 'solidarity' was a result of the division of labour within a group (Durkheim, 1893, 1933). The first case is relevant for small communities and the second one is a function of more anonymous relations between people that are tied to each

other by common interests, especially in the division of labour where cooperation is a central ingredient. This divide between mechanical and organic solidarity can be compared with Tönnies' concepts *gemeinschaft* und *gesellschaft* (Tönnies, 1887, 1957).

To clarify these issues related to the concept of social integration it is necessary to have a critical look upon basic models of society and its dynamics in order to assess the consequences for understanding social integration.

To summarise the remarks on the theoretical background that may be important for developing a common understanding of social integration and a precondition for generating indicators of high quality it can be deduced that a concept of social integration should take into consideration:

- structural possibilities and constraints as well as
- actions and communication.

Integration has to be described as opportunities in terms of structures (availability of and accessibility to resources) as well as in terms of variety of actions and density of communication. The fact that social exclusion is caused by a number of changes in social, cultural and economic conditions rather than a change in one specific variable necessitates a relatively wide scope of indicators. In order to make the project viable, the choice of indicators had been done in a pragmatic way, at least initially. This does not mean that more sophisticated approaches to analyse and measure social exclusion, as outlined above, are excluded.

1.4 Spatial Dimension of Social Integration

Studies of social integration and social exclusion show that social diversification has a discernible spatial dimension. Increasing concentration of exposure to social hardships can be observed on two levels:

- intra-regionally
- inter-regionally

From an intra-regional perspective it is obvious that the inequality problem has been exacerbated by a spatial concentration on a local level. The rapidly increasing inequalities between neighbourhoods is an issue of growing political concern. In particular, for countries with an outspoken ambition to reduce inequalities and promote equitable living conditions, the developments during the last decade have been problematic.

The question of geographical consideration, when targeting programmes, shows both concord and differences among European countries. What unites countries is obviously the spatial concentration of problems. Social exclusion has a geographic dimension. To a very large, and increasing, extent people facing social exclusion or being in processes that might end up in exclusion, are spatially concentrated in areas with poor reputation and relatively poor standards. Further, many of the countries witness a gradual reinforcement of the stigma of these exposed neighbourhoods (Madanipour, Allen, Cars 1998).

From an inter-regional perspective, one aspect of recent structural changes in society is increasing differences among regions and cities. While some cities and regions have managed to counteract the recession by restructuring of their economic base, other regions or cities, often with a traditional industrial base, are facing a continuous decline in employment. This has resulted in unemployment rates that vary substantially by region.

In conclusion, there are various arguments for underlining the significance of intra-regional and inter-regional perspectives when addressing issues concerning social integration:

- Substantial groups of the population are affected, e.g. depending on ethnicity, religion, gender, nationality, and age.
- The significance of problems is a result of unsatisfactory programmes to promote social integration on the local level (urban social integration problems).
- Social integration problems on the local level are consequences of policies shaped on the European level.

1.5 Welfare Regimes - Northern and Southern Responses to Social Exclusion

All member states in the Union have formal and informal systems for provision and delivery of social welfare. Schematically these delivery systems can be grouped in four categories:

- The **labour market**. By participating in the labour market individuals obtain financial and other resources that can be utilised for 'purchasing' social services and other social welfare qualities, either by direct consumption or by savings and insurance to meet social needs that might occur in later stages of life.
- The **family** constitutes another system for delivering social welfare. The basic foundation of this system lies in the concepts of solidarity and redistribution. Family members help each other by satisfying social needs and in achieving other welfare ambitions. This family based delivery system have different faces, e.g. it can involve grandparents taking care of children, members of the family with a work income financially supporting family members lacking income, and middle-aged members taking care of old family members in need for care and support.
- The **civil society** constitutes a third system for delivery of social welfare. Similar to the 'family-system' key concepts are voluntariness and solidarity. By being part of various networks the individual, in case of hardship, can achieve social support from civil society and the voluntary sector. This system operates in different ways; sometimes highly informal and sometimes more formalised. Informal networks on an individual level can be constituted by friends or neighbours supporting one another in situations of hardship or to improve day-to-day life and social welfare on a more general level. Formalised networks can be illustrated by membership in for example organisations, clubs or churches, which in various ways have social obligations and tasks with respect to the social well-being of their members.
- The **welfare state** constitutes the fourth system for welfare delivery. The task here is basically is to redistribute common resources in such a way that basic social needs and

levels are guaranteed to the population. The state welfare system can be having different orientation, being either general or selective. The general approach includes measures applying the entire population. Selective approaches are targeted at groups with 'special needs', normally individuals or households in a weak social position.

When the member countries are compared two distinct patterns can be observed. First, the different systems for delivering social welfare are highly integrated. Thus, the welfare of an individual could be seen as the total outcome when delivery through the different systems is added up. This interdependence means that a change in one system impacts on the welfare of the individual as well as on the conditions for the other systems.

Second, when the members states are compared, it becomes obvious that the main emphasis varies. In some countries welfare delivery by the family play a significant role, in others the welfare state have a predominant role. When comparing member states in these respect similarities between various countries can be observed. Member states can schematically be organised in geographical clusters.

In this kind of approach, Esping-Anderson's typological work on national welfare regimes (1985) provides a key set of ideas informing current debates over changing national patterns of social provision. His main proposition is that there are three ideal typical models of welfare provision in Europe. The Nordic (or social democratic) model is based on relationships between the social partners in circumstances of relative labour scarcity and seeks to ensure that the social conditions of employment support the well-being of society. The Anglo-Saxon (or liberal) model is based on a view of society as composed of atomised individuals and seeks to ensure that each person attains a minimum material standard of well-being. The Continental (corporatist or conservative) model is based on a conception of society as comprising groups with reciprocal rights and obligations.

A similar categorisation has been done in an recent analyse of market, welfare, state and family, commissioned by the Union (Vogel 1997). Vogel identifies three distinct geographical clusters with similar welfare delivery strategies:

- A ***Nordic cluster of advanced institutional welfare states*** (Sweden, Denmark, Finland)
- A ***Southern cluster of family and welfare states***, relying on the traditional family as the prime welfare delivery strategy (Portugal, Spain, Italy and Greece).
- A ***intermediate Central European cluster*** with moderate institutional and family arrangements, in combination with corporate and social protection strategy. (Vogel 1997).

The weakness of ideal typical analysis, such as Esping-Anderson's, is that it always oversimplifies the phenomena that it is designed to reflect (Allen 1998). However, this simplification allows the identification of issues of crucial importance when analysing possible strategies for developing the welfare regimes.

As mentioned, it is obvious that the delivery systems are interdependent and that changes in one system impacts on other. Furthermore, it is noticeable that the main emphasis of welfare delivery changes over time. After World War II, there is a unanimous trend in the direction an expanding welfare state, which in turn meant a parallel decrease in

responsibility for the family and civil society to deliver social welfare. The idea of welfare and freedom from poverty as a social right became in most member states (Vogel 1997).

During the recent decade, Europe has experienced significant structural changes and a recession in the economy. The globalisation of the economy and financial constraints on public expenditure are two features of this change. They have in both direct and indirect ways affected the systems for welfare delivery. One direct change is the cutting in various public welfare programmes, i.e. public agencies stepping back from welfare ambitions and programmes developed during post war period. Another and indirect effect is the discussion about a reformed configuration of the welfare system. This debate has emerged from various starting-points; e.g. the claim that welfare state mechanisms for delivery are inefficient and poorly targeted, for reason of public financial constraint, and by claims that services provided by family and civil society contains qualities that cannot be replaced by public and professional welfare delivery systems (see for example Allen, Cars, Madanipour 1998, Vogel 1997, etc).

The outcome of the current debate and ongoing reconfiguration of the welfare system still remains to be seen. Esping Andersen (1996) identifies three possible routes. The **Scandinavian route** based e.g. the continuation of full employment and public jobs to support the infrastructure for equal opportunities and social investment. This model presupposes a high tax-burden. The **neo-liberal route** stresses market distortion by welfare state intervention and advocates labour market and wage flexibility. This route is accompanied by cuts in the transfer systems. The third route is labelled as the **labour reduction route** and is based on a jobless growth scenario and the growing surplus of unskilled de-industrialised labour. This route supports early retirement, and income maintenance and job security of a shrinking insider work force. The choice of route, or combination of routes to large extent still remains to be taken.

1.6 Regions for Comparison

The decision, only to take into account intra-regional (social) integration does not determine the particular (territorial) unit of analysis. Once having accepted that sub-societies exist, the territorial scale turns out to become quite arbitrary, ranging from urban neighbourhoods or small rural communities to nation-states. For statistical reasons and also for quite pragmatic reasons of policy making, there has to be a choice made as to which level seems most appropriate for the proposed intra-regional level.

Even apart from data-problems the NUTS III level would probably show a non-feasible picture of spatial incidence and distribution of social integration problems in Europe. Therefore the NUTS II-level has been chosen. Spatial incidence of different degrees and factors of social integration should show up clearly by comparing the roughly 200 regions.

So the main idea is

- to look at the conditions which may be responsible for social integration/exclusion (at the local and intra-regional level) from an European ('high up') perspective by comparing NUTS II- regions

In order to take into account the most important functional features of the regions the comparative classifying these regions according to their urbanity/rurality may enrich analysis. The method to be applied is the OECD scheme for territorial indicators (OECD 1994, 1996), based on population density. The territorial scheme covers the entire territory, distinguishes two hierarchical levels of geographic detail: local level and regional level and uses simple (everywhere available) criteria. Regions can usually be characterised as *more or less rural/urban*. Applying the scheme for NUTS II-regions already is shown by a report of the DG VI (EC 1997).

Looking into future stages of this work, it might be useful to extend the differentiation of regions for certain objectives of analysis by developing a certain typology. As mentioned above, there are differences to be taken into account analysing of social integration in the Northern as in the Southern parts of Europe. There are also differences within each country that ought to be analysed according to social integration. Here, it could be useful to work in urban/rural dimensions, with different kinds of regions in between. In this case, we have chosen the following typology – which of course can be extended or reduced - within the countries: metropolitan regions, university regions, regional service centres, old factory towns, small towns, and rural areas. This typology is based on the dominant features in the relevant regions.

Table 1:

Dimensions (functional/geographical)	Northern Europe	Central Europe	Southern Europe
Metropolitan			
University			
Regional service centres			
Old factory towns			
Small towns			
Rural areas			

The white spots represent different sets of indicators that differ according to the North-South divide as well as according to the urban-rural dimension. In this case, there will be 15 different combinations where the social indicators have different weights with respect to social integration and cohesion. For example, the family relations are much more important for social cohesion and integration in the Southern Europe than in the Northern. In the Northern parts, the family relations are of much more importance in the rural areas than in the metropolitans ones. The same are probably valid in the Southern parts according to family relations in an urban-rural dimension. The same reasoning can be applied to other indicators e.g. religion, trade unions, cultural heritage, etc.

However, the standard of data availability for the time being only does offer restricted possibilities for developing such typologies and at the same time doesn't leave any chances for applying it in order to describe social integration issues.

1.7 Need for Knowledge - Quantitative and Qualitative Indicators

Over a long period of time different measures to promote integration have been taken. The results have been varied. Stories of both relative success and failure can be reported. A problem reported in evaluations is the difficulty of relating measures to effects. Traditional evaluation measures have often turned out less appropriate. It is obvious that the effects of a specific measure are difficult to evaluate with respect to its impact on integration. The measure taken can on the one hand be deemed to have only a marginal positive impact. However if looked upon as one ingredient in an arsenal of measures to combat exclusion it can be found to have had significant importance.

Our need for knowledge is thus due to the fact that we only have a limited understanding about the relations between various measures that are ingredients in strategies to promote integration. Recent policy interest has focused on how to build 'routes to jobs' which could make links between households in difficulty and the wider society. Still, however, such program often lacks a clear focus because of uncertainty on which activities that should be included in the programme and the profile of various activities included.

It is very difficult to capture the dynamics of exclusionary processes and the scale of their variation through international data sets such as those provided by EUROSTAT in recent years, although these provide a valuable account of the scale and tendencies of particular conditions across Europe. To monitor how these conditions come about and how far policy initiatives are making any inroads into these conditions requires an understanding of the everyday life-worlds of those experiencing exclusion. Increasingly, these life-worlds are spatially concentrated in particular parts of cities and regions, in disadvantaged neighbourhoods. Developing indicators of exclusionary processes, and developing ideas about policy options, requires a research strategy, which can get access to the fine grain of living conditions in particular places.

A first need for knowledge relates to the *process leading to exclusion*. Until we understand processes of exclusion, it is not possible to develop more detailed indicators of social change. Nor is it possible to develop, in an effective way, strategies to combat exclusion and to promote social integration. Simple indicators cannot readily explain the process of social exclusion. It involves a multi-dimensional situation. Being poor, or unemployed or belonging to an ethnic minority in a segregated neighbourhood are not conditions that in isolation, can be taken as evidence that a person is 'excluded'. The individual can, despite these hardships, very well be part of 'mainstream society'. Having a network of relationships and taking part in various social activities, the individual can have a rich social and cultural life. However, it can be claimed that an individual or a group of individuals, that is facing social or economic hardship in a certain dimension becomes more vulnerable to social exclusion. This exposure lends risk of entering a circle leading them away from integration and towards isolation and exclusion.

There is also a need for knowledge concerning the *process leading to integration*. Thus, today we realise that social exclusion is the result of a *process*. Analogously it becomes

obvious that aims to bring households back to mainstream society must focus on *processes* through which integration comes about. This emphasises the importance of the social relationships within which households live and their degree of interconnection with networks, which could lead them towards educational, economic, and cultural opportunity.

2 INDICATING SOCIAL INTEGRATION

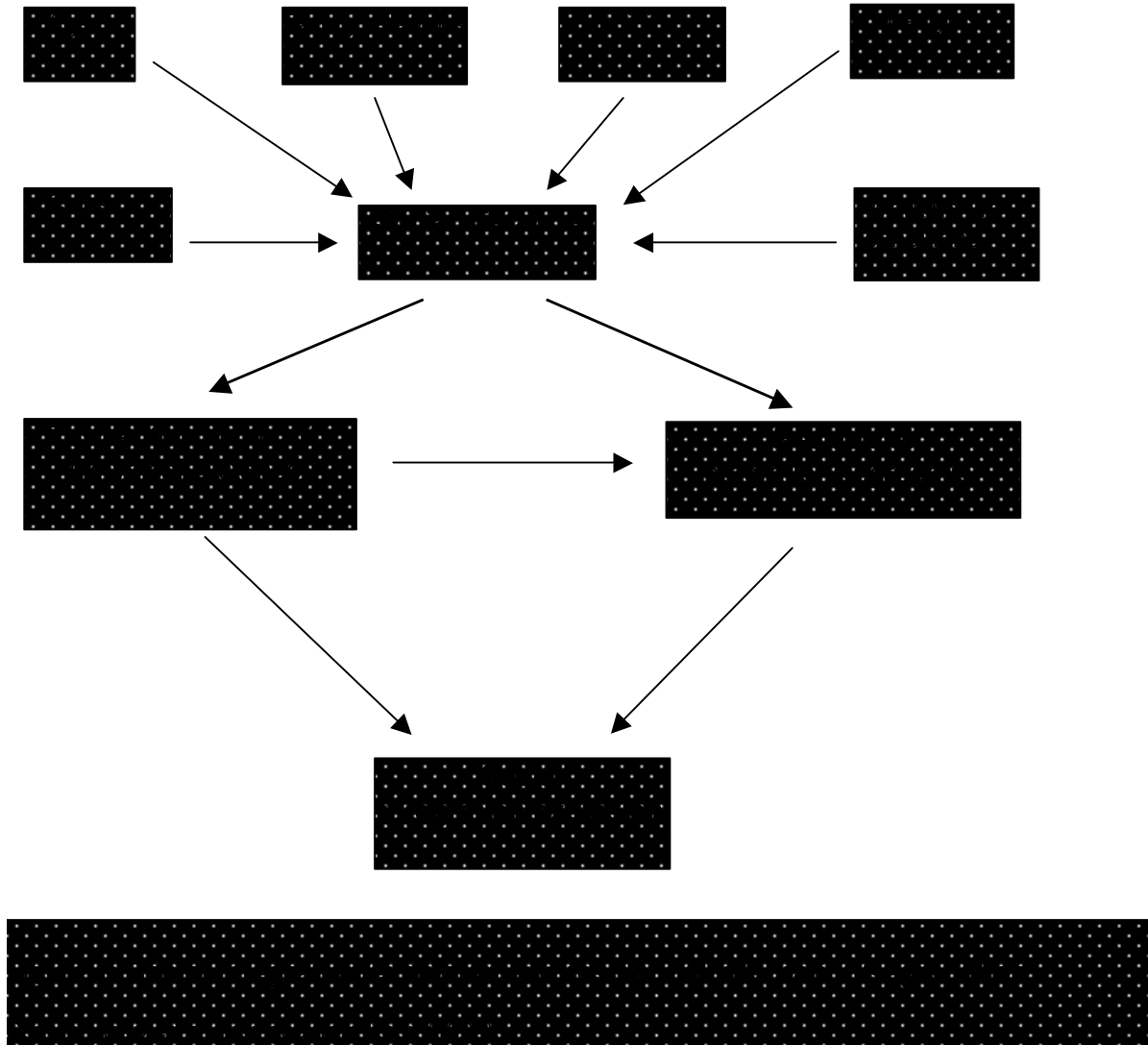
2.1 Processes Behind Social Exclusion and/or Integration

Social and physical distances and social integration/exclusion

Social integration/exclusion between different groups of people is to a great deal a function of social distance. The less the social distance, the greater is the probability of physical proximity between people. The relation between social interaction, social and physical distance is, however, is closely interwoven. The physical distance seems, however, to be of lesser importance today than before, especially for people with post-industrial lifestyles. For the 'lower' classes and people with low incomes, the ghettos and then short physical distance are still valid.

Social and physical distances act as mutually reinforcing factors of social integration and residential segregation. Residential segregation minimises the conflicts between social groups with different values and attitudes. It has also impacts on the social control mechanism as a consequence of the relatively homogeneous groups in the area. It will not, however, minimise the conflicts between social groups in different housing areas that are characterised by quite different social structures. Thus, it has impacts on social integration in the small housing areas or local level but results in social exclusion on the regional level. This can be illustrated – in a schematic way – in the following figure. (For a more exhaustive discussion of these processes, see e.g. Knox, 1994).

In figure 1, the family relations have been explicitly introduced in the integration/exclusion process. This is partly motivated by the North-South dimension, partly by the fact that differing ethnic groups have quite different family relations even within the same cities or regions despite the North-South divide. In North-South perspective it is a well-known fact that the families are larger and that differing generation share the same dwelling and have a common economy much more than in the Northern parts of Europe (Vogel, 1997). This phenomenon has implications on the social integration process – extended families in the Southern Europe serve as a substitute for social transfers in the Nordic welfare states or vice versa; in the Nordic countries the institutional welfare state have substituted the traditional family ties and then eroded the family as a form of social protection. However, even within the Nordic countries there are a lot of ethnic groups where the enlarged families still exist. These groups are, however, not integrated in the surrounding community – instead they are often social excluded and living in segregated housing areas.



From Fordism to Post-Fordism

During the last decades the world economy has experienced substantial and structural changes. Globalisation is often used as a concept summarising these changes. Globalisation has had different implications for various countries depending on their previous role in the world economy and also depending on their potentials to develop competitive strategies meeting the emerging demands of the globalised markets.

For the member countries of the Union the process of globalisation has brought about substantial changes within the labour market, changes which in turn have affected the welfare systems and issues of social integration and social exclusion.

During the last decade member countries have experienced a rapid decline in employment within the traditional industry sectors, i.e. heavy industries and manufacturing industries. Blue-collar jobs within these sectors of industry have declined as consequences of increased competition from other countries and subsequent closure of plants or by

improvements of efficiency and a subsequent reduced need for labour-force. According to the quality of working life history stands witness that mechanisation and automation has reduced much of the pain from the hard manual works but instead the psychological aspects of the jobs – often white-collar - have been upgraded. Studies have, however, showed that people with blue-collar jobs still are less satisfied with their jobs than people with white-collar jobs (Vogel, 1997).

This development is drastic in itself as it has led to the loss of millions of jobs within the union and to substantially increased levels of unemployment. However besides this direct and immediate effect, the decline of the traditional industrial sectors has also led to the successive erosion of the foundations of the national welfare systems.

In most member countries the welfare systems have been based on the condition of high employment rates. Even though differences between countries in the union are clearly visible, a similar pattern in the construction of the welfare systems can be observed. To large extent the systems have had a feature in supporting people facing situations of social hardship and in redistributing resources to make it possible also for households with low incomes to have a good standard of living in terms of housing and various kinds of services, e.g. schooling, and medical care. These welfare ambitions have been accompanied by a tax system by which governments, depending on national conditions and political preferences, have identified an equilibrium between on the one hand social welfare ambitions and on the other taxation.

The development of the economy during the last decade has called for the rethinking of these welfare systems. In retrospect it is obvious that the recession in the economy in the early 1990's was far more than a temporary downswing. For the member states the recession meant a permanent loss of millions of jobs within traditional industry sectors. The constraints on the welfare system have been twofold. First the tax base has eroded due to the rapidly increased unemployment. In parallel the need for public social support has increased as a consequence of the fact that people being hit by unemployment no longer are self-supportive. The consequence of this double pressure has posed constraints on public service provision. Throughout the union we can see public welfare providing agencies facing a situation characterised by tight, and often shrinking, budgets having to cope with increased demands for social support and service.

The constraints on public finances for social support and welfare programmes have in an obvious way impacted on traditional policies to combat social exclusion and promote integration, e.g. it is reported that substantial cuts have been made within housing regeneration schemes, educational programmes and other public undertakings with relevance for social integration.

Besides the direct impact on social integration caused by constraints on the public economy also indirect impacts can be observed as a consequence of the rapid change in the composition of jobs on the labour market. The upswing of the European economy over the last few years has confirmed the assumption that the 'old industrial jobs' are permanently gone. Instead the expansion of work opportunities lies in other sectors of the labour market.

Schematically the new jobs can be found in two fields of the economy. First there is a rapid growth of jobs relating to the modern technologies, e.g. information techniques, education and media. Second there is an increased demand for labour within the basic service sectors. The change in the composition of work opportunities has social impacts in various ways. First it is obvious that there is a mismatch between the skills required for many of the „new and qualified“ jobs and the skills normally held by the people being unemployed. Thus, at the same time as there is a lack of labour and bottlenecks in some business sectors there is a vast unemployment. Also for the work opportunities in the relatively unqualified service sector can be observed problems in matching the skills of traditional blue-collar-workers with the demands from the labour market. An additional problem in the expanding unqualified service sectors is that wages often are relatively low. This in turn has leads to welfare considerations as households relying on incomes from this sector often face various kinds of economic and social hardships.

Deindustrialisation, post-Fordism and the spatial division of labour

Deindustrialisation is intimately bound up with structural transformation of the economy. However, friction-free economic transformations are not the rule – instead, disharmonies arise by virtue out of the fact that resources are not shifted out of stagnating activities into expanding ones. Simultaneously with deindustrialisation reindustrialisation is taking place.

That new industries are replacing old ones, have always been both a central and a natural element of the process of economic transformation and change. Reindustrialisation, like deindustrialisation, is not a cyclical but a structural phenomenon. However, the term reindustrialisation has obtained an extra dimension when coupled with deindustrialisation and the rise of the service society. Much of what is growing in the borderlands between manufacturing industry and service production - industry-related service production - is a significant feature of the reindustrialisation process.

Another problem is, however, that processes of deindustrialisation and reindustrialisation – in most cases - do not coincide spatially. Reindustrialisation usually occurs in other regions than the traditional industrial centres. In the deindustrialised regions, the economy is characterised by economic stagnation or retardation. Particularly hard hit are traditional industrial regions with one-sided labour markets. In these regions, there is often a surplus of labour, but the ‘wrong’ type of labour from the employer's point of view. The workers in these areas have found it very difficult to find new jobs with long-term unemployment as one outcome and - for the older workers - early retirement another. The result has thus been a withdrawal from the labour force among elderly people in these old manufacturing regions. In the reindustrialised regions, the development pattern is different. The economy is growing and there is a shortage of labour with qualifications matching the skills required for new jobs emerging.

This also ties in with the changed alignment of investment. In the old traditional industrial regions, expansion and well-being to a large extent were associated with investments in material assets such as buildings and machinery. Today and tomorrow, it is the non-material investments - R & D, product development, training, and marketing - that form the foundation of expansion and dynamics. This process is a central ingredient in the

transformation of the society from Fordism to post-Fordism – a transformation that has consequences on both employment and organisation of the working life.

Thus, the post-Fordist localisation patterns differ from the Fordist ones. The new suburbs were indeed a Fordist phenomenon, a result of the improved means for transport, but the investment pattern was almost the same. The natural resources and the markets were the dominant factors behind the localisation of the factories and workplaces. In the post-Fordist era, these location patterns have changed. In the post-industrial society, the settlement pattern of the labour force – especially the highly educated - is an important factor in decision-making concerning spatial location for investments (see e.g. Andersson, 1985; Claval, 1990; Hall, 1990, 1991; Massey, 1995; Johansson, 1996). Different regions have differently composed capital and labour markets, which implies that the development possibilities are not equal regarding choices of technology available for adoption. Since there exists a mutual dependence between the labour force's competence structure and the introduction of new technology, a lack of competence is a restriction to innovative activities and technology renewal. With the rise of the post-industrial society, companies have increasingly been inclined to locate themselves where skilled and highly educated labour exists. A location shifts is visible, from traditional industrial areas in decline to innovative and creative ones. This feature is especially noticeable with respect to knowledge-intensive activities which is characterised by easily movable capital. Attractive living conditions appeal to well educated people and thereby dragging the companies along with them. In Europe, this is one of the factors behind the growth of the dynamic arc from northern Italy through southern France and down to north-western Spain.

With regard to labour market development, the social polarisation processes are thus not only an interregional or an urban-rural problem. Perhaps, social exclusion is even more pronounced within the regions and especially then in the big cities. In many respects, social interaction and social integration are more pronounced in rural areas and small towns, compared to larger cities. The social network is more developed and even if there are a lot of problems related to age, education, and gender structures, social exclusion seems not to be of the same magnitude as in the urban areas. In the urban areas, segregation is much more pronounced - also in the spatial sense - with concentrated pockets of poverty and deprivation as only one illustration. The social structure is much more homogenous in the rural areas and small towns than in metropolitan areas with a lot of in-movers, where the lower labour force exclusion seems to be more obvious with drug problems and dependence of social benefits as other illustrations.¹ The social structure in the former regions and municipalities has more the form of a pyramid - in the urban areas the social pyramid has been replaced by hour-glass. The income distribution in the Post-Fordist society not only looks like an hour-glass, but the metaphor also describes an economic mechanism. "If, under fordism, one could argue that 'the rich lived off the expenditure of the poor', i.e. wage workers' expenditure accounted for the turnover of entrepreneurs, in the

¹ This description is much in line with Durkheim's, Simmel's and Wirth's reasoning about 'urbanism as a way of life', where anonymous social relations and deviant aspects of the daily life are pronounced (Durkheim, 1987; Simmel, 1905; Wirth, 1938). Their writings have in much created the image of the metropolitan areas as a more social deviant and unnatural society than the rural ones. This reasoning has, however, been called in question in other studies, where social cohesion in rural areas and small

case of the hour-glass society ‘the poor lives off what trickles down from the expenditure of the rich’” Lipietz, 1998). The heterogeneity of the labour force in the big city areas seems to be a precondition for economic and social transformation and development at the same time as it is seemed to be a hampering factor with regard to social integration.

Labour market segmentation in the post-Fordist era

During the Fordist era the divide in primary and secondary labour market segments was developed and accentuated as a result of the organisation of the working process which was characterised by mass production. The primary labour segment was characterised by high, wages, good working conditions, chances of advancement and employment stability. The primary labour market segment was also in much an internal labour market where on the job-training and workplace related knowledge were central ingredients. The secondary segment was – on the other hand – characterised by low wages, poor working conditions, little or few chances of advancement and a high turnover among the labour force. There were more or less sharp dividing lines between the two segments.²

The industrial society, organised according to Fordist principles, changed during the 60s and 70s with the introduction of ‘lean’ production that “combines the advantage of craft production and mass production, while avoiding the high cost of the former and the rigidity of the latter” (Womack, Jones and Roos, 1990, quoted in Rifkin, 1996). For many of the old products the markets were saturated and niche production was the new prestige word. Once again, flexibility, teamwork, and multi-skilled workers were back on the factory floor. This post-Fordist organisation of the work process does not, however, mean that the segmentation of the labour market disappeared. Instead, it took other directions since the mismatch on the labour market increased. Hand-in-hand with ‘jobless growth’, long-term unemployment, declining unionism and a higher labour force participation rate of women, and then also more part-time and casual work, have occurred in the EU (Samers and Woods, 1998).³

Thus one element of the transformation process from Fordism to post-Fordism an increased segmentation of the labour market. In the industrial society, labour and capital were interchangeable to a large extent. Today the picture is different. The introduction of new technology requires labour with certain qualifications and thus also a certain degree of training at the same time as flexibility has become increasingly important - labour, as a factor of production has become augmenting heterogeneous. The increased labour market segmentation thus hamper the transfer of unemployed industrial workers from traditional

towns have been investigated (Knox,1994).

² The divide of the labour market in primary and secondary segments has been a central ingredient in the segmented labour market theory since this theory’s introducing in labour market analysis in the beginning of the early 70s (see e.g. Reich, Edwards and Gordon, 1973; Piore, 1975).

³ Gordon, Edward and Reich have in a study of the history of the American labour market discussed its development in a long wave perspective. Three stages can be identified – initial proletarianisation, homogenisation, and segmentation – that are partly overlapping. These phases have gone through differing stages – development, consolidation, and disintegration. The proletarianisation phase includes the period from the 1820s to the 1890s. The homogenisation phase, the period from the end of ‘the long depression’ during the end of the 19th century and up to WWII, and the segmentation phase

blue-collar jobs to new jobs in knowledge-intensive activities in the manufacturing industry as well as in the dynamic parts of the service sector.

Matching problems have existed in the labour market since the beginning of the industrial period. In Europe, at least until the 1970s, labourers that moved from the rural areas generally had no problem finding work in rapidly growing industries in the expanding urban areas. During the Fordist period, manufacturing required a lot of labour with 'standardised competence', that is, labour which directly could be placed in simple, repetitive tasks. Today, one of the problems on the post-Fordist labour market is the existence of both shortages and surpluses of labour within the same companies, branches, and commuting regions. The reason is that the labour market has become increasingly segmented and fragmented with respect to competence levels. A segmented labour market consists of a number of sub-markets, which are more or less separated from one another by various obstacles, resulting in a heterogeneous and unsubstitutable labour force. These sub-markets have their own supply and demand situations, their own wage structures and their own surpluses or shortages of labour. Investment in intangible capital had replaced investment in tangible capital in importance to the development process. The result of these processes is a further segmentation and polarisation of the labour force and then also changing working life conditions and the trade unions minor role is a weakening of the social cohesion at the working place level.⁴

Thus, structural changes in the labour market have in most Western countries led to a deindustrialisation process with rapid decline in employment within the manufacturing industries. Blue-collar jobs within these sectors of industry have declined as consequences of increased competition from other countries and subsequent closure of plants or by improvements of efficiency and a subsequent reduced need for labour-force. This development is drastic in itself as it has led to the loss of millions of, especially, blue-collar jobs and subsequently to substantially increased levels of - predominantly structural and long-term - unemployment. However besides this direct and immediate effect, the decline of the traditional industrial sectors also has – as in the case of Sweden in the 90s - led to the successive erosion of the foundations of the national welfare systems with reductions in employment in the public sector.

The transformation of the society in a post-industrial direction is confirmed by the fact that despite the upswing of the European economy over the last few years, the 'old industrial jobs' are permanently gone. Instead, the expansion of work opportunities lies in other sectors of the labour market. Schematically the new jobs can be found in two fields of the economy. First, there is a rapid growth of jobs relating to the modern technologies, e.g.

from WWI and up to today (Gordon, Edwards and Reich, 1982; see also Reich., 1984)

⁴ Within this framework, it can be shown that the competence of labour on the one hand and the quality of technology on the other are two processes that reinforce each other. Instead of the negative feedback processes, entailing that original inequality will result in a process towards equality and convergence - 'spread effects' - that is a fundamental part in the neo-classical theory, the positive feedback processes will dominate, resulting in divergent development and regional polarisation and then also in a social exclusion - 'backwash effects' The concepts 'spread effects' and 'backwash effects' is taken from Myrdal (1954), and the concepts positive and negative feedback processes are from Vietorisz & Harrison (1973).

information techniques, education and media. Second, there is an increased demand for labour within the basic service sectors. The change in the composition of work opportunities has social impacts in various ways. It is obvious that there is a 'mismatch' between the skills required for many of the 'new and qualified' jobs and the skills normally held by people being unemployed. Thus, at the same time as there is a lack of labour and bottlenecks in some business sectors there is a vast unemployment. In addition, for the work opportunities in the relatively unqualified service sector can be observed problems in matching the skills of traditional blue-collar-workers with the demands of the labour market. An additional problem in the expanding unqualified service sectors is that wages often are low. This in turn has led to welfare considerations as households relying on incomes from this sector often face various kinds of economic and social hardships.

The regional maladjustments or the mismatches on the labour market thus seem to have been accentuated over the past decades.⁵ Different regions have differently composed labour markets. The labour required by the expanding urban labour market in the post-industrial society is also different from that of the old industrial areas. The division of labour has increasingly been a regional division with an accentuated regional polarisation as one result (Massey, 1995, Johansson, 1996). The result of these processes is – as mentioned above - a further segmentation and polarisation of the labour force and then also changing working life conditions between as well as within regions and cities according to competence levels, age structure, income development, and employment opportunities.

Fordism, post-Fordism and the quality of working life

Compared to the Fordist era the organisation of the working process has changed. Assembly lines and standardisation have decreased in importance and flexibility has become the new key-concept in the organisation of the work. According to the quality of working life history stands witness that mechanisation and automation has reduced much of the pain from the hard manual works but instead the psychological aspects of the jobs – often white-collar - have been upgraded. However, recent studies show that people with blue-collar jobs still are less satisfied with their jobs than people with white-collar jobs (Vogel, 1997).

It is not only the organisation of the working process that has changed during the transition from Fordism to post-Fordism – also the employment and unemployment structures have changed. Security of employment and risk of unemployment are important ingredients in the quality of working life conditions. During the Fordist era unemployment was as a rule the result of ordinary variations in the business cycles. Unemployed in various homogenous segments returned to their 'old' jobs when the economy entered an up-swing. During the post-Fordist era the significance of the structural transformation has increased in importance. 'Deficient-demand' unemployment has been substituted by structural unemployment. The structure of the economy in the post-Fordist era has changed the matching process with regard to different 'vintages' or segments of labour both on workplace, local, and regional level. One of the indications that the mismatch on the labour

⁵ For an overview with respect to mismatches on the labour markets in differing European countries during the

market has been accentuated is the increase in long-term unemployment both in absolute and relative terms.

Unemployment - especially long-term unemployment - is one of the most obvious causes to social exclusion. The unemployment differs between various regions but also within the regions a wide unemployment span according to ages, gender, education domestic and foreign workers, and competence can be found. The increased segmentation or dualisation of the labour market has accentuated the unemployment problem and a substantial segment of the population has lost foothold on the labour market with social exclusion as a result.

Open unemployment is, however, not the only a problem with regard to the quality of the working life. 'Hidden' unemployment between and within different regions and local areas as well as between different groups in the labour force constitute a large and growing problem. This has also an urban-rural dimension — traditionally hidden unemployment has been higher in the rural areas as a consequence of the economic structure, with possibilities to self-supportive activities, and perhaps also because of the more developed social networks that hamper the risk of social exclusion.

The division within classes or social groups has thus been accentuated. The influence of the trade unions and the working life conditions in the every day life has, as mentioned above, been eroded. In consequence of these processes there has been a fragmentation of class-based identities and as e.g. Stuart Hall has observed, instead of the term 'working class' there are a lot of sub-groups included and also articulated within this 'old' concept unemployed, low-skilled, semiskilled, low-educated, part-time workers etc. This fragmentation process erodes the social integration and cohesion among e.g. the working class (Hall, 1988, quoted from Vertovec, 1999). This fragmentation of the working life has also implications on the social life – there has also been an accentuated fragmentation of the social life between home, school, friends and relatives. This fragmentation is also a spatial fragmentation where one of the results is a spatial segregation of different classes, ethnic groups and household types. This is not a new phenomena - already during the Fordist period, economic competition and division of labour contributed to spatial differentiation and housing segregation (Wirth, adapted from Knox, 1994).

In addition, trade unions play a role in respect to the conditions of working life. Trade unions are more frequent in areas dominated by large-scale industry than in areas dominated by agriculture and small-scale industry. The influence of the trade unions on the working conditions has eroded during the post-Fordist era and subsequently also their ability to hamper social effects of unemployment. In addition, the existence of a 'grey working sector' can be observed in the metropolitan areas, frequently occupied by 'marginalised' people, where self-employment is a rule that probably accentuate alienation and social exclusion. Many of the potential jobs will, however, be found in the lower segments of the private service sector and many of the migrants will be self-employed in these kinds of jobs or unemployed. This process will accentuate the social exclusion and hamper social cohesion

1970s and 1980s, see Padoa Schioppa, 1990.

and integration, especially in the urban areas and big cities.

In conclusion, it can be noted that some groups in society have been hardly hit by the structural changes in economy. A substantial group is unemployed; others are relying on casual work or low-income jobs. For people unemployed or only casually working, the life situation is normally not only characterised by economic hardship, unemployment or casual works but has often also other social impacts. Participation in the labour market can be a gateway to other social arenas. The workplace has often been the base for building of social relations. It can be observed that this social aspect of employment has been of special importance for immigrants. The work place has been the arena for learning the language and for getting familiar to culture and traditions of their new country (Madanipour, Allen and Cars, 1998).

Fordism, post-Fordism and the quality of social life

The structural changes of the labour market have yielded substantial social consequences. Many countries can observe rapid changes in the social conditions. Thus, structural changes in the labour market have accentuated both spatial segregation and social exclusion during the past decades. As long as people moved in to the new dwellings in the areas surrounding the metropolitan areas as a response of shortage of labour, the social and spatial segregation relatively was held as a minor problem. The large scale housing schemes provided flats of high standard, to affordable rents. Parallel investments in public transport and roads made workplaces relatively accessible. Segregation was also combated by schemes aiming at the improvement of everyday life for people living in these areas, e.g. substantial investments in education, health-care, culture and leisure activities.

The structural changes within the labour market have successively altered the conditions for these areas. Previously residents were predominately poor working class largely with common values and interests. Informal networking to improve life conditions was a significant feature of many of these neighbourhoods. Today the situation is different. The unemployment numbers are significant. Further, the homogeneity that previously characterised these neighbourhoods is long gone. Rather than homogeneity, the neighbourhoods are characterised by diversity. These diversities can be based on age and conflicts between generations, between 'old' residents and 'newcomers' or on tensions between residents of different ethnic background. In addition, issues of employment, gender and culture contribute to the diversity of the neighbourhoods. The fact that the economic base, in terms of employment, is lost for many households combined with the fact that the composition of the neighbourhood is becoming increasing diversified has weakened local solidarity. The "working class identity" has eroded and diversification has made it more difficult to establish networks for collaborative efforts to improve the situation of individuals and the neighbourhood (Madanipour, Allen and Cars, 1998).

This development has taken many of these neighbourhoods into a vicious circle of decline, and today many of them are characterised by marginalisation and stigmatisation. Households with resources have moved out of the estates, being replaced by household with poorer resources and less opportunities on the housing market. Low-income housing

areas are also unstable with respect to the level of mobility. The result is a negative selection and an accentuated segregation both between and within neighbourhoods.

There is increasing policy concern about the processes of social exclusion within the European Union in general. An increasing social and economic gap is emerging between various population groups. While some groups are benefiting from the increasing economic and cultural integration within the European Union, others face increasing difficulties. For substantial groups of citizens the last few years can be described as a vicious circle that is successively taking them into poverty. The consequences of poverty, marginalisation and increased polarisation are understood by EU member governments as a problem with top priority on the national agendas. On the European level is recognised the dangers of increasing social divisions and social polarisation and the necessity for measures to increase social cohesion and to reintegrate excluded groups: "The starting point for future urban development must be to recognise the role of the cities as motors for regional, national and European economic progress. At the same time, it also has to be taken into account that urban areas, especially the depressed districts of medium-sized and larger cities, have borne many of the social costs of past changes in terms of industrial adjustment and dereliction, inadequate housing, long-term unemployment, crime, and social exclusion. The twin challenge facing European urban policy is therefore one of maintaining its cities at the forefront of an increasingly globalised and competitive economy while addressing the cumulative legacy of urban deprivation. These two aspects are complementary" (CEC, 1997).

Thus, there is a common understanding of the seriousness of the social problems we are facing and also about the need for urgent action. Over the last few years social exclusion has become an issue with high priority on the political agendas in most member countries. In several countries special government committees have been set up and given the task to analyse mechanisms of social exclusion and to develop strategies to promote integration. As a result of this activity we can see newly adopted and emerging programmes in member countries, including improved concepts for addressing issues of exclusion and integration.

Finally, in parallel to these changes of the labour market can be observed an increased differentiation of the housing market. From member countries come reports witnessing that people outside the labour market or with an casual role in labour market to increasingly degree tend to become physically segregated. Being excluded from the labour market increases the risk of ending up in stigmatised neighbourhoods and thereby being shut off from various activities and also from routes to enter mainstream society (CEC 1997). From a mapping of current social policies and programmes to regenerate and promote social cohesion in neighbourhoods, it is evident that issues regarding deliverance of services and governance are issues that need to be addressed. A rather common assessment in the member countries studied is that issues regarding governance, including reformulation of roles and relations between agencies, professionals and residents, and the development of new modes for delivery of services are necessary to further improve strategies to promote social integration (Allen, Cars and Madanipour, 1999).

2.2 Conceptual Model

For describing conditions that impact on social integration we propose the following conceptual framework, based on Ringen (1995) and developed by e.g. Vogel (1997) and Eurostat (1998). The framework is based on a distinction of three concepts:

- Resources (inputs)
- arenas
- outcomes.

This framework has been elaborated on and modified, especially when it comes to resources. Sometimes resources are referred to as social needs, sometimes as accessibility and/or availability to resources. In other research works (refs.), inputs are regarded as the combination of social and governmental inputs.

When it comes to arenas, there is no clear-cut definition on which arenas should be included into a set of appropriate indicators. There are various sociological approaches to this, dependent mainly on the society of the origin of the researcher. There is definitely no consensus even within Europe, let alone a global one.

Output is usually regarded as a macro result of the choices made by a (sub)population, measured either in an objective or subjective way.

Resources

According to CPS (1998), resources are the personal characteristics which are beneficial for a person's position in life and which determine the range of options people have for choosing a way of life. As an individual, there are a number of needs, relating to various spheres of personal life, e.g. housing, employment, education and material well-being. The degree to which these needs are fulfilled provide the basis for the individual's overall assessment of quality of life.

Markets/Arenas

Arenas constitute the structural opportunities and constraints in daily life. In order to achieve social goals and ambitions individuals enter different markets or arenas, e.g. housing market, labour market, or local arenas for service and culture.

Social outcome

The social outcome can be understood as the results of the choices people make, their resources, and the constraints constituted by the arenas.

In the terminology, developed in CPS (1998) *availability and accessibility* would be subsumed under resource factors, whereas *participation* corresponds to the arena. The outcome would be the degree of social integration, for which adequate indicators will have to be designed also. This output cannot be conceived on the level of the social groups or individuals but on the level of the whole society under consideration (examples: crime rate, participation in elections, poverty rate, etc.)

This distinction between resources (input) and arena on the one hand and output on the other hand may be helpful not only in the detection of adequate indicators to describe the phenomenon, but also to make the relationship between causes and effects at least clearly visible.

Social Integration should be seen in relation to some sort of (normative) benchmark. Furthermore, the *distribution* of certain aspects within society at a given time (e.g. income, educational levels, etc.) is more interesting than *averages*. This is particularly true for the time factor, as Social Integration should be seen in a dynamic perspective.

The relations between social needs, market/arenas, and social outcome are illustrated in table 2 below. In the table, five main arenas of concern are mentioned, according to the discussion in chapter 1. These arenas could of course be subject to discussion. For the purpose of illustration, an example of an indicator set is included.

Table 2: **A conceptual model for social indicators**

Subject matter areas	Input (resources)	Arena	Outcome
Labour market	Labour force	Labour market	Unemployment
Income/redistribution	(Public) spendings	Service facilities	Income(distribution)
Education	Gov't input Pupils	Education system (e.g. schools)	Literacy rate
Housing market	Dwellings	Housing market	Housing standard
<i>Social cohesion and political resources; the civic society</i>	Population by sub-group	Social networks and private social support	Participation in elections and organisations
Income and Services/redistribution	(Public) spendings	Service facilities, allowances	Access to child care

The social outcome is not delivered in a vacuum. The outcome delivered, directly and indirectly impacts on the individuals assessment of social needs. Also the social outcome can impact on the functioning of markets and arenas, by sending signals that are picked up by politicians and private actors in various markets and arenas. Thus, our conceptual model is highly dynamic, the social needs, actions on markets and arenas, and social outcome are strongly interlinked, e.g. besides a decrease of the in the dispensable income unemployment may also lead to decreased housing standard, and that quality of services which the individual access becomes lower. This deterioration may in turn lead the individual to reformulate his/her need, and it might lead to changes on markets or arenas, due to economic and political changes in society.

Thus, social exclusion and social integration are dynamic processes and subsequently it is important to capture the way in different conditions and actions interplay and thereby shape social conditions. This can basically be done in two ways. First, by in depth studies of the dynamic process in which analysis of interdependencies is focused. This method has obvious advantages, but also considerable disadvantages. An advantage is that analysis

can provide information about mutual relations and dependencies. However, at the same time information far from always provide clear-cut conclusions. Many relations and findings can be occasional. Despite analysis we do not understand how the processes is functioning. In the case of social integration we find these problems extra relevant. Therefore, we propose a second approach, longitudinal studies. Also this method has its pros and cons. The problems are related to time. Sequences of observations spread over time are prerequisites for longitudinal studies. We believe that this problem to large extent can be overcome by a strategic choice of indicators, i.e. indicators that are such that they are relatively easy accessible, and for which also historic information is available. The main advantage with longitudinal analysis is that actual, historical, as well as contemporary, conditions and relations can be taken as starting-points for the analysis of dynamic relations.

3. PRESENTATION OF INDICATORS

The fact that social exclusion is caused by a number of changes in social, cultural and economic conditions rather than a change in one specific variable necessitates a relatively wide scope of indicators. In order to make the project viable, the choice of indicators will have to be done in a pragmatic way, at least initially. Indicators should provide an overall view of welfare and everyday life.

Developing an indicator set describing the regional dimension of social integration/exclusion from an European point of view we have to face the problem that very often there is a lack of suitable and harmonised data below the national level for European-wide comparisons of the social situations. Despite this difficulty and in order to obtain some results already from this first working stage on the indicator sets, various theses were formulated on the basis of existing studies. These theses served as starting-points for further work.

As for the development of proper measures to combat social exclusion it is necessary to gather information about the structure of social integration/exclusion and to specify the regional levels on which it is taking place. The quality of information provided by a specific indicator as well as sets of indicators can vary, depending on regional economic and social conditions. A specific indicator can be useful to describe the social situation in one type of region, however, for another type of region the indicator might be of less value or not at all applicable. Hence, there is no set of indicators that are applicable for all kinds of regions.

The following sets of indicators have been chosen to provide a picture of welfare and social conditions - indicators that are relevant according to social integration and social exclusion. The indicator sets correspond also to the arenas outlined above.

- A. Basic indicators (background information on the regions)
 - Demographic development and structure
 - Economic development and structure

- B. Specific indicators (social integration/exclusion of specific groups)

Indicator set 1:	Labour market
Indicator set 2:	Migrants and refugees
Indicator set 3:	Education
Indicator set 4:	Income
Indicator set 5:	Housing and living conditions
Indicator set 6:	Social cohesion and political resources

A basic indicator set is, thus, proposed to be included. These indicators are mainly resource indicators, reflecting basic features of a region at a certain time. These indicators would have an impact on all arenas and they could be regarded as the long-term outcome of social processes. The indicator sets are not isolated blocks - instead they are reinforcing the social processes in different directions through different kind of feedback between the indicators that result in positive or negative development processes.

We have to face the problem that very often there is a lack of suitable and harmonised data below the national level for European-wide comparisons of the social situations. Despite this difficulty and in order to obtain some results already from this first working stage on the indicator sets, various theses have been formulated based on existing studies. These theses served as starting-points for the further work.

As for the development of proper measures to combat social exclusion, it is necessary to gather information about the form/structure of social integration/exclusion and to analyse the specific regional level on which it is taking place. The chosen indicators will be represented on different regional levels - the national level and NUTS II - and differing region types on the NUTS II- level.

3.1 Background Variables and Indicator Sets

This indicator set contains indicators measuring the demographic structure, economic power and changes on different regional levels.

Demography

Age, gender and household status are very important factors in the development of social integration. In all EU-nations, one of the most acute demographic problems is ageing in combination with very low fertility rates. The economic transformation with the resulting rise in unemployment, new family patterns, higher female labour force participation and the rise of the public sector are factors that often are mentioned as reasons to the declining fertility rates. The total fertility rate is far below the generation-replacement threshold. According to the North-South divide, families are still larger in the southern parts of Europe compared to then northern parts. The decline in fertility has, however, been much more pronounced in the Southern than in the Northern or Central parts of Europe during the past decades. The reason why families are still larger in the Southern parts is partly a function of differing family patterns, partly of a time-lag in the decline of fertility rates. The Northern countries fell below the reproduction threshold already around 1970 – in Southern Europe, this level was attained about ten years later and is now below the Nordic level (Vogel, 1997). This means that the population growth has been increasingly dependent on immigration from other

countries outside the EU.

The low fertility rates have traditionally been an urban problem – especially a metropolitan problem – but this is not the case today. Instead, the effect of this phenomenon is most accentuated in crisis and rural areas as a consequence of the migratory movements. It is a well-known fact that younger people have higher migration intensities than older ones and highly educated persons have higher migration intensities than low educated persons. As new knowledge often is a cohort phenomenon, the out-migration of young people is connected with a loss of human capital. Here, there are connections between demography and economy as these processes result in a polarisation between different regions - some regions are characterised as dynamic and expansive while others are characterised as stagnant and retarding. These mental maps hamper the renewal of the latter regions - both in economic and social senses. One of the most important location factors for the knowledge-based firms is the supply of well-educated labour, followed by the image of the potential location and investment region. According to social exclusion/integration at the intra-regional level, these processes do not seem to be a problem at the first sight. The problem is, however, that there are a lot of intra-generation social problems, especially in big cities. These problems are consequences of the structure of the inhabitants in the urban areas both between the generations and, especially, within the generations. The latter is most pronounced among young people where differing subcultures are most frequent and apparent.

The selected indicators should allow statements on the regional population density and structure as well as about the trends in future regional demographic development. Focal points of the analysis are the age structure of the population and the migration flows.

The underlying thesis is - as indicated above - that we find population decrease with a tendency to a superannuated population (many old people) especially in extremely peripheral regions, where unfavourable labour market conditions and insufficient infrastructure induce the migration of many young active persons.

On the other hand, many urban agglomerations and overcrowded regions – especially economic growth regions – register remarkable population increases. Very often this increase rates are the result of migration flows. Therefore, migration - as a cause of population increases of towns as well as a cause of in- and out-migration in/to certain city districts - is/can be an urban problem that often also is connected with social problems. (Indicators on demography are illustrated in Maps 1-5)

Table 3: **Availability of data - demography**

INDICATORS	Harmonized data <i>EUROSTAT</i>		Not harmonized data <i>National statistics</i>	
	national	regional (NUTS II)	national	regional (NUTS II)
demography				
inhabitants/sqkm	X	X	X	X
population increase	X	X	X	X
natural population increase	X	X	X	X
net migration in ‰	X	X	X	X
gross flows - migration	X	X?(interreg)	X	X

foreign popul. in % total popul.	X	-	X	X?
population 0-20 years	X	X	X	X
population 60 years and older	X	X	X	X
average household size	X	-	X	X?
extended households	X	-	X	X?
single households	X	-	X	X?
young adults living with parents	X	-	X	X?

X = available in Eurostat databases or national statistic yearbooks

Xo = available in other national statistic studies

X? = partly available/found in Eurostat or national statistic yearbooks (for certain years or countries)

Xo? = partly available/found in other national statistic studies (for certain years or countries)

- = not available/found

Economic structure

The most commonly used indicator for national/regional economic conditions and economic development is the Gross Domestic Product per capita (GDP/cap). Although disputed in recent years, this indicator should be included until a better one is constructed. Even if the GDP-gaps between the European countries and regions have narrowed, there are still big disparities between regions in static as well as dynamic terms. (GDP is illustrated in Map 6 and 7)

Table 4: **Availability of data - Economic structure**

INDICATORS	Harmonized data <i>EUROSTAT</i>		Not harmonized data <i>National statistics</i>	
	national	regional (NUTS II)	national	regional (NUTS II)
economic structure				
GDP/inhabitant	X	X	X	X
employment by econom.sectors	X	X	X	X

X = available in Eurostat databases or national statistic yearbooks

Xo = available in other national statistic studies

X? = partly available/found in Eurostat or national statistic yearbooks (for certain years or countries)

Xo? = partly available/found in other national statistic studies (for certain years or countries)

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Indicator set 1: Labour market

Employment and social integration

Employment and job opportunities are central ingredients when discussing social integration/exclusion. Unemployment and low labour force participation – especially among men – often result in isolation and social exclusion. On the regional level, unemployment may not be regarded as severe as on a national level, since migration is a more plausible alternative to unemployment compared to the national level. Even commuting could be regarded an option, depending on the NUTS level to be chosen. For the moment, we disregard these options, particularly if we regard the segmentation of labour markets as a severe restriction for migrating and/or commuting.

Movements in employment and unemployment rates have been linked in most of the European countries. Despite high unemployment levels, there has been a growth in atypical forms of jobs as temporary and part-time work (OECD, 1999). This increase in part-time work goes hand in hand with a higher female labour force participation rate – this means that new categories are entering the labour market. This growth in part-time employment has contributed significantly to the employment growth in many EU-countries during the 90s. The growth in part-time employment has, however, gone hand in hand with an increase in the unemployment level in some European countries – e.g. Germany, France and Italy - but it has also hampered the decline in full-time employment. In other countries such as Ireland and Netherlands these kinds of have had a positive impact on the employment growth in combination with a decline in unemployment (OECD, 1999). The problem most of the EU-countries today is how increase the employment rate by reducing unemployment and by increase the labour force participation rate among people who are outside the labour force (George, 1996). A job is not only a mean to increase the personal incomes – it has also a lot of effects on social integration and on strengthening the self-confidence. Employment is often a prerequisite for a virtuous circle on the labour market as well as on the social arena and then also hampering factor with respect to marginalisation in both cases.

Long-term unemployment often results in the development of subcultures, where unemployment sometimes seems to be a normal part of daily life. The social cohesion within subcultures is often very strong, but they are not integrated in the surrounding society. This phenomenon is reinforced when these subcultures also have regional or local dimensions and then especially in combination with various ethnic characteristics. The existence of these kinds of subcultures is most pronounced in the metropolitan and big city areas.

Consequently, we regard *labour market* the main arena and *employment, unemployment and labour force* participation the main output indicator from this arena. Salary (or wage) is certainly also the main income source. However, to a growing extent, labour market and social allowances complement income. The output indicator income - or income distribution - would therefore have to be regarded as output from at least two arenas, the second one being the 'social welfare system'.

Main *constraints* to entering labour market are traditionally (lack of) education, child-care problems, language skills and sometimes also ethnicity and religion. These constraints may be regarded as input indicators to the labour market arena, but surely also to other arenas, e.g. decision making and housing.

A more appropriate output indicator on the labour market arena in dynamic terms should rather be exclusion and inclusion to the labour market. In other words, it should ideally be measured as gross increase and decrease of employment and/or unemployment. However, these data are not likely to be available on a reasonably low regional level other than in scattered member countries. The access (accessibility) to the labour market is a very important indicator for social integration/exclusion. The comparison between labour force

participation rates, unemployment rates, their changes and the structures of unemployment, which are influenced by specific structural and/or cyclical conditions, shows clear differences among the European regions. (Illustration indicators on labour market Maps 8-15)

Segmentation

In theory, regional employment - and thus unemployment - is considered to be associated with regional differences in supply and demand of labour. Through rational decisions, labour is supposed to move from regions with a limited number of well-paid jobs, high unemployment and an overrepresentation of decreasing industrial branches, to expansive regions with a surplus of modern jobs. The rate of mobility is moderated by demographic factors: migration is dominated by younger persons, especially with higher education. Furthermore, their investments in housing and real estate as well as in social networks in a given locality are generally less than for older persons. Individuals, which have not yet formed a family of their own, have less personal restrictions to move to another region. In the migration process, there are a lot of selective mechanisms, which result in a social polarisation both between and within different regions and cities.

Different regions and cities have, thus, differently composed labour markets, which implies that the development possibilities are not equal regarding choices of technology available for adoption. Since there is a mutual dependence between the labour force's competence structure and the introduction of new technology, a lack of competence is a restriction to innovative activities and technology renewal. This relationship applies especially to old industrial regions or rural areas characterised by economic backwardness. In these regions, there often is a surplus of labour, but the 'wrong' type of labour from the employer's point of view.

These social polarisation processes are not, however, only an interregional or an urban-rural problem. Instead, the social exclusion is perhaps even more pronounced within the regions and especially then in the big cities. In rural areas and small towns, the social network is more developed and even if there are a lot of problems with age, education, and gender structures, social exclusion does not seem to be of the same kind as in the metro areas. In the metro areas, the segregation is much more pronounced - even in the spatial sense - with large ghettos as only one example. The social structure is much more homogenous in the rural areas and small towns than in metropolitan areas with a lot of in-movers, where the lower labour force exclusion seems to be more obvious with drug problems and dependence of social benefits as other illustrations. The social structure in the former regions and municipalities has more the form of a pyramid - in the metro areas the social pyramid has been replaced by the social time-glass. The heterogeneity of the labour force in the big city areas is a precondition for economic and social transformation and development at the same time as it is a hampering factor with regard to social integration.

The mismatch on the labour market and then the existence of both shortages and surpluses of labour within the same companies, branches, and regions has been accentuated during the past decades. One of the reasons for this is that the labour market has become

increasingly segmented regarding competence levels. A segmented labour market consists of a number of sub-markets, which have their own supply and demand situations, their own wage structures and their own surpluses or shortages of labour. The labour force is not homogenous – instead it is heterogeneous and then in many cases unsubstitutable both according to both differing labour segments and capital. Investment in intangible capital had replaced investment in tangible capital in importance to the development process. The result of these processes is a further segmentation and polarisation of the labour force. This will also result in a polarisation *between* as well as *within* regions and cities according to competence levels, age structure, income development, and employment opportunities.

Although the occupational activities of women are rising in all European countries, there can still be identified a strong concentration of working women in distinct economic sectors and branches. In relation to the foreign workers, we encounter a similar situation and development. Irregular working periods, part-time jobs, and the restricted access to higher positions are just a few other characteristics of these employment groups.

Table 5: **Availability of data - labour market**

INDICATORS	Harmonized data <i>EUROSTAT</i>		Not harmonized data <i>National statistics</i>	
	national	regional (NUTS II)	national	regional (NUTS II)
labour market				
employment rate/by sex	X	X	X	X
activity rate by sex	X	X	X	X
part-time employment	X	X	X	X
part-time employment by sex	X	-	X	Xo?
foreign workers	X?(96;97)	-	X	X?
foreign workers by econ. sectors	-	-	X?	Xo?
% skilled workers	X	-	X	X?
% unskilled workers	X	-	X	X?
% low paid workers	X	-	X	X?
persons by educat.level 25-59y	X	X	X	X
segmentation/mismatch	-	-	X?	X?
child care institutions	-	-	X?	X?

X = available in Eurostat databases or national statistic yearbooks

Xo = available in other national statistic studies

X? = partly available/found in Eurostat or national statistic yearbooks (for certain years or countries)

Xo? = partly available/found in other national statistic studies (for certain years or countries)

- = not available/found

Unemployment and social exclusion

Unemployment - especially long-term unemployment - is one of the most severe problems in relation to social integration or social exclusion. This means that it is very important to find common criteria and indicators for this variable. Unemployment differs between various regions but even within the regions there are a wide unemployment span according to ages, gender, education domestic and foreign workers, competence levels and so on. The increased segmentation of the labour market has accentuated the unemployment problem.

As mentioned above, there are a lot of people who have no foothold on the labour market with social exclusion as a result.

The criterion of open unemployment does not seem to be any problem with regard to comparing the situation and development between different regions in the EU. Instead, the problem is to estimate hidden unemployment between and within different areas as well as between different groups in the labour force. This has also an urban-rural dimension — traditionally hidden unemployment has been higher in the rural areas as a consequence of the economic structure and the more developed social networks. Trade unions are more frequent in large-scale industrial areas than in areas dominated by agriculture and small-scale industry. This will also result in an underestimation of the unemployment in the latter regions and municipalities. In the metropolitan areas there exists, however, a 'grey sector' frequently occupied by marginalised people where self-employment is a rule.

Another problem with regard to compare the unemployment between and within regions is the differing labour market policy in the EU member states. Some nations have more active labour market policy than others and this can result in lower official unemployment figures. People in education as a consequence of labour market problems — e.g. unemployment — will also reduce the open unemployment. The same is valid with regard to the number of workers, who are employed in various public relief works.

To develop common criteria according unemployment and social exclusion it seems thus necessary that all these facts accompanying also are considered. Otherwise, it is obvious that the analyses and comparisons between and within differing regions and local areas will be incorrect and grounded on false premises.

The level and structure of unemployment give an impression of the quantitative and qualitative 'gaps' between the demand for work and the jobs available. As both problems depend on regional economic and structural characteristics, we find them in different regions (region-types). While unemployment in peripheral/rural areas in many cases is a 'quantitative' problem (lack of jobs), in urban areas it is mostly a 'qualitative' one (increasing demand for work meets low qualified workers).

(Illustration of indicators on unemployment maps 10-15)

Table 6: **Availability of data - unemployment**

INDICATORS	Harmonized data <i>EUROSTAT</i>		Not harmonized data <i>National statistics</i>	
	national	regional (NUTS II)	national	regional (NUTS II)
unemployment rate / by sex	X	X	X	X
unemployed pers. by educa.level	X	-	X	Xo?
Long-term unemployment	X	X	X	X
long-term unemploy.by sex/age	X	-	X	Xo?
segmentation/mismatch	-	-	X?	X?
child care institutions	-	-	X?	X?

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Indicator set 2: Migrants and refugees

According to traditional push-pull theories, economic disparities should, in a free labour market, give rise to high migration from low-income to high-income countries or regions. This implies that labour surplus – e. g. open and hidden unemployment - and low wages will be the determinant factors behind the migration decisions from countries outside the EU, but even the high wages in most of the EU-countries will give some hopes about the future, which will further stimulate the labour mobility process. Hidden unemployment and marginalised workers in jobs with a high degree of self-sufficiency seem to be much higher in most of the countries outside the EU than in the EU-countries. According to a traditional push-pull theory, this would stimulate the immigration from countries outside the EU.

However, according to the segmented labour market theories, this should result in workers who - released as a consequence of the continued structural transformation in the out-migration areas - are not demanded in either the private or the public sectors in the EU-countries in the same way as before, since the demand for this kind of labour seems to be quite limited today. The more far-reaching transformation of e.g. the Nordic and Western European economies in a post-industrial direction has reduced the demand for traditional blue-collar workers. Instead, there has been rapid employment growth in the service sectors - both private and public. Especially the private service sector has, in recent years, been associated with the transformation of the economy in a knowledge-intensive direction. One result of this transformation process is the looser connection between the business cycles and labour force migration of the 80s and 90s. During these years, immigration to the EU has rather been a function of political events in other parts of the world and, since the beginning of the 70s, the majority of the immigrants have been refugees working in the lower segments of the private service sector where the educational level is very low.

The structural transformation of the EU, with a great increase in employment in the service sector, has also changed the picture with regard to employment opportunities for the immigrants. Instead of blue-collar work in the goods-producing sector, immigrants are nowadays predominantly employed in the lower segments of the service sector. As a consequence of the structural transformation of the economies in the EU, the push factors are now stronger than the pull factors for immigrants. This has also resulted in a changed employment structure, with a large share of the immigrants working in jobs refused by the native labour force.

To sum up the effects of the structural transformation in the EU on labour mobility, it is obvious that there was still room and demand for blue-collar immigrants up to the 70s. After that, deindustrialisation and structural transformation hampered blue-collar immigration. There was no longer any demand for that type of labour. Instead, present and future labour

market segmentation will result in those migrants ending up in the lower segments of the private service sector - i.e. cleaning, dish-washing etc. The educational level in these segments is low, turnover high, unionisation low, and risk of unemployment high. This phenomenon has resulted in an ethnic segmentation in the sense that even if the immigrants have a high education, the job alternatives even for this category in many cases are in the lower segment of the private service sector.

The economic transformation does not only have implications on the international migration - even the internal migratory movements are affected. When unemployment increases and the regional unemployment levels and living standards diverge, the internal migration pattern changes in a way more alike the migration pattern in third world. This will result in an out-migration from rural areas to larger towns and metro areas, where the labour market is more diversified. From a human capital approach, this is rational even if there are no jobs directly in the destination areas. The more diversified labour market in these areas will give the migrants a better chance to find one compared to staying home. Many of the potential jobs will, however, be found in the lower segments of the private service sector and many of the migrants will be self-employed in these kinds of jobs or unemployed. This process will accentuate the social exclusion and hamper social cohesion and integration, especially in the metro areas and big cities.

Table 7: **Availability of data - migrants and refugees**

INDICATORS	Harmonized data <i>EUROSTAT</i>		Not harmonized data <i>National statistics</i>	
	national	regional (NUTS II)	national	regional (NUTS II)
net migration in ‰	X	X	X	X
gross flows - migration	X	X?(interreg)	X	X
foreign popul. in ‰ total popul.	X	-	X	X?
employment by econom.sectors	X	X	X	X
activity rate by sex	X	X	X	X
foreign workers	X?(96;97)	-	X	X?
foreign workers by econ. sectors	-	-	X?	Xo?
persons by educat.level 25-59y	X	X	X	X
unemployed pers. by educa.level	X	-	X	Xo?

X = available in Eurostat databases or national statistic yearbooks

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- = not available/found

Indicator set 3: Education

There has also been a widening gap between well-educated young people and low-educated in the big cities which has reinforced the gang-mentality and then the effects of differing subcultures. Segregation and conflicts between different gangs among young people has been an accentuated problem especially at the intra-regional level.

The educational system is regarded another important arena. A good education is increasingly important for access to the labour market. It is of course also important for participation in any kind of public decision-making. One might say the educational system belongs to public service in general, just like health care, child-care etc. Since it has such an important bearing on labour market opportunities as well as obvious constraints for entering, we think it may well be regarded an independent 'arena' in a social exclusion context. The most commonly used output indicator on the micro level for education is the highest educational level achieved. Thus, a relevant indicator on a macro regional level should be the proportion of third level education. Focusing on social exclusion though would rather suggest illiteracy or proportion of low educated more suitable indicators.

The enrolment in education and the education levels of the population are of great importance in describing social integration/exclusion, because they point out the qualification structure, the flexibility and the (future) potentials and chances of people in regard to the labour market (working and earning possibilities). In many cases we find that unemployment and especially long-term unemployment most of all concerns persons with a lower education level. Therefore, the number of people in higher education and the participation of women as well as the regional (rural/urban and European-wide) differences of these points are the most interesting questions.

Of course, in this context we have to take into consideration also the unequal distribution and availability of higher schools and universities in the different regions and other characteristics of the national education system like: the public expenditure on education, scholarships, education allowances, public and private schools etc..

Table 8: **Availability of data - education**

INDICATORS	Harmonized data <i>EUROSTAT</i>		Not harmonized data <i>National statistics</i>	
	national	regional (NUTS II)	national	regional (NUTS II)
students in % of 15-30y. populat.	X	X	X	X
women in higer education	X	X	X	X
students in schools f. handicapp.	X	-	X	X?
persons by educat.level 25-59y	X	X	X	X
illiteracy rate	-	-	X?	-
higher schools & universities	-	-	X	X?
education expenditure in % GDP	X	-	X	-

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Xo = available in other national statistic studies

X? = partly available/found in Eurostat or national statistic yearbooks (for certain years or countries)

Xo? = partly available/found in other national statistic studies (for certain years or countries)

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Indicator set 4: Income

The indicator set 'income' was created to measure the income structure and wealth versus poverty of the population in the different European countries and regions.

Most of the empirical research of social protection has been limited to macro statistics of public social expenditure and its consequences for the micro level outcome in terms of income (in)equality and poverty. The focus of this research is the relation between labour market and public intervention. The key issue is the 'decommodification' of labour, and the relative role of the redistributive effects of public intervention. There are two pertinent groups of values involved: social justice and economic efficiency normally treated as contradictory holdings. Justice refers to a distribution of living conditions perceived as 'acceptable'. Economic efficiency relates to the role of differential rewards as a driving force in a market economy. High levels of social protection expenditure are usually related to higher levels of taxation. Since the role of public sector would vary substantially between member countries in the field of particularly services, public expenditure in terms of e.g. child-care, health-care, ageing insurance etc., we face difficulties in finding good indicators. Public expenditures as a proportion of GDP, which is a fairly common indicator in various surveys, may not always be appropriate.

Indicators related to population groups may be more appropriate when it comes to services. As to social welfare and unemployment allowances, a relevant indicator on the micro level should rather be the degree of dependency, i.e. public allowance as a proportion of total income. On a regional or national level, a feasible indicator should be the proportion of households (or individuals) predominantly dependent on social protection.

The income level is a decisive factor for the living standard and the future planning of the households. As the available household income is the financial source for the livelihood, it determines how much a person/family can afford and which possibilities for the participation in the different social spheres one has. Therefore, we assume, that low-income households are concerned with social exclusion more often than other households.

Although in the meantime all European countries have reached similar average income levels, the southern countries show the lowest average incomes. However, in social respects the different regional income levels and the income distribution within the population are more interesting. Regional income levels depend on the economical structure - employment and earning possibilities in the industrial or service sector - and therefore also on the type of region (rural or urban area). Inequalities also still exist between the earnings of men and women.

If income cannot be obtained from/through employment and/or other sources, the governmental social protection systems (benefits for pensioners, sick persons, families with children, unemployed and handicapped people) ensure a minimum income.

Even if there has been a development toward convergence with regard to incomes per capita *between* the EU-countries, there are a lot of signs that the income inequalities have been accentuated *within* the EU-countries. The poverty rates – disposable income below 50 percent of the national average – divide the EU in three clusters. The Nordic countries have

to the lowest poverty rates followed by the Central European cluster. The Southern countries and UK are most unequal according to income distribution. According to the affluence rates - disposable income over 150 percent of the national average – the same pattern according to the national clusters is valid. According to the subjective poverty indicators, even here we find the same regional pattern (Vogel, 1997).

A central ingredient in the process of social integration/exclusion is the possibilities to earn one's living without public assistance. The definition of subsistence level differs between nations and regions according to variations in standard of living and other factors. Despite these things, it seems obvious that the marginalisation of people as a consequence of the economic and social development during recent years has been accentuated, especially in the big cities. Beggars, dropouts and homeless people are only signs of these phenomena – phenomena that are much deeper and not so obvious. Nevertheless, many people have today been mixed up in vicious circles or poverty traps, which are very hard to get rid of.

Table 9: **Availability of data - income**

INDICATORS	Harmonized data <i>EUROSTAT</i>		Not harmonized data <i>National statistics</i>	
	national	regional (NUTS II)	national	regional (NUTS II)
average earnings / by sex	X	X?	X	Xo
household income per capita	X	-	X	Xo
income distribution in deciles	X	-	X	Xo
poverty rate	X	-	X	-
affluence rate	X	-	X	-
social benefit dependency	X	-	X	X?
social protection % of income	X	-	X	-
social protection benefit per pers.	X	-	X	-
social expenditure in % GDP	X	-	X	-
social protect. benefit by function	X	-	X	-

X = available in Eurostat databases or national statistic yearbooks

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- = not available/found

Indicator set 5: Housing and living conditions

The indicator set 'housing and living conditions' contains indicators measuring housing standards and expenditures and their changes over time in the European regions.

Also the housing conditions and the amenities of the dwellings reveal important information on the standard of living. Very often 'overcrowded' and poor housing conditions are a hint for poverty and social exclusion.

The access to (more expensive) high value/high class dwellings as well as to dwellings in a

good location and neighbourhood most of all depends on the level of the household income. Due to changed economic conditions in most of the European countries, the housing expenditure (rent, electricity, heating) comes first in the expenditure structure of the private households. Further factors are the household size, the different ownership, tenure, and the social housing situation.

A remarkable improvement in the housing standards of all European countries has been taken place in the past years, but in some peripheral and southern regions it is still lower than in others. Poor housing conditions are also an urban problem that in many cases leads to the spatial segregation of poor persons and/or ethnic groups in distinct quarters.

Table 10: **Availability of data - housing and living conditions**

INDICATORS	Harmonized data <i>EUROSTAT</i>		Not harmonized data <i>National statistics</i>	
	national	regional (NUTS II)	national	regional (NUTS II)
number of rooms/person	X	-	X	-
number of rooms/household	X	-	X	-
dwellings with bathroom/shower, toilet	X	X	X	X
homeless people	-	-	X?	-
housing expenditure in % of household consumption expend.	X	-	X	-

X = available in Eurostat databases or national statistic yearbooks

Xo = available in other national statistic studies

X? = partly available/found in Eurostat or national statistic yearbooks (for certain years or countries)

Xo? = partly available/found in other national statistic studies (for certain years or countries)

- = not available/found

Indicator set 6: Social cohesion and political resources

Political exclusion is often combined with social exclusion. Various ethnic groups, low educated, long-term unemployed, youngsters, 'drop outs' and so on are categories where the participation in public elections is low. Many foreigners do not even have the possibilities to vote, a fact that hampers of course their interest to take part in domestic politics, despite that many of these people are – or have been - very active in the political field in their home countries. Isolation and apathy are often effects of social exclusion and this paradoxically results in a low political activity among people that ought to be in the most need of taking part of political activities both at the local, regional and national level.

Social networks and social capital

Civil society, social networks, and social capital are concepts of great importance concerning social integration or exclusion. According to Waltzer, the civil society includes unions, churches, political parties, social movements, co-operatives and „societies for promoting or preventing this and that“ (Waltzer, 1992, quoted from Vertovec, 1999).

According to Putnam social capital describes „features of social organisation, such as trusts, norms, and networks, that can improve the efficiency of society by facilitating co-ordinated actions“ (Putnam, 1993, 167). Putnam’s study is predominantly focused on the differing conditions within Italy, but a lot of other studies have also shown that existence of social networks are very important according to job creation and as a support in periods of unemployment or other social problems that otherwise - in many cases - would result in isolation and apathy (see e.g. Tjernström, 1999; for the connections between social networks and flexible specialisation, see Piore and Sabel, 1984). With regard to the North-South dimension, there are indications that these phenomena are more evident in the Southern parts of Europe than in the Northern parts, where formal networks seem to have greater importance (Vogel, 1997). Presence of social networks can thus be seen as virtuous circles according to the social integration process and then consequently, absence of social networks as vicious circles. As the indicator ‘social net’ a qualitative character, there exist, however, a lot of problems according to the collection of data in this field. A lot of studies are required to get an overall view of the role of social networks in the social integration process as they differ between countries and regions, social categories and so on.

Informal relations

Social networks and activities in local organisations are often connected with informal business relations. These are probably also more frequent in small and medium-sized cities and rural areas than in the metro areas. Data on the informal business relations are almost absent and even in this place a lot of studies are needed to draw any valid conclusions about these phenomena. In a North-South dimension, even in this case, there seem to be a lot of signs that these kinds of networks are more frequent in the Southern parts of Europe than in the Northern parts.

Subcultures

The role of subcultures has also – as mentioned above - regional dimensions. In the metro areas, the role of these subcultures is often combined with various ethnic characteristics. This will result in segregation and social exclusion from the surrounding society even if the social cohesion is very strong within the subcultures and the segregated areas.

The role of subcultures is difficult to estimate in a quantitative way. Data on segregation are, however, much easier to find. On a regional level, a segregation index may be considered as a reasonably good indicator. Segregation in its turn could be expressed in terms of ethnicity.

There is a growing awareness that race, ethnicity, and citizenship plays a significant role with respect to integration.

Participation and mobilisation

Participation in organisations and interest groups is an indicator that often is used as a proxy for the existence of social networks and participation in common activities. Even if

socially marginalised people have the same political rights as other people, they are much more excluded from the political system and political participation. An indication of this phenomenon is that in the European countries, where immigrants and refugees have possibilities to vote this fact is indisputable – their electoral participation rates are much lower than the corresponding participation rates for domestic people.

There are, however, regional and demographic dimensions in this variable when used in a quantitative way. The transformation of the Western societies during the past decades in a post-industrial way has, probably, resulted in a lower participation rate in differing organisations and interest groups. Political fatalism and disempowering of the trade unions have resulted in lower activity rates in political parties and trade unions. At least the latter was earlier more important according to social integration and cohesion at working place level. Especially in the metropolitan and big city areas the ties between social integration and participation in organisations and interests groups has lost much of its function as an indicator of social integration/exclusion during the past decades.

Family relations

Family relations are perhaps the most important factor concerning social cohesion and integration. From a North-South perspective this factor has, however, differing weights in a ‘social integration index’. It is a well-known fact that families in the South are larger and the generations share the same dwelling and have a common economy much more than in the Northern parts of Europe. This phenomenon has implications on the social integration process – extended families in Southern Europe serve as a substitute for social transfers in the Nordic welfare states or vice versa; in the Nordic countries the institutional welfare state has substituted the traditional family ties and then eroded the family as a form of social protection. The other side of the coin is that the social welfare state introduces more anonymous relations between the including actors and this will not stimulate social integration – at the same time as the anonymous welfare state develops, the social cohesion grounded on family relations will be eroded. This is at trend that we can see even in the Southern parts of Europe with higher labour force participation rates among married women.

Table 11: **Availability of data - social cohesion and political resources**

INDICATORS	Harmonized data <i>EUROSTAT</i>		Not harmonized data <i>National statistics</i>	
	national	regional (NUTS II)	national	regional (NUTS II)
average household size	X	-	X	X?
extended households	X	-	X	X?
single households	X	-	X	X?
young adults living with parents	X	-	X	X?
neighbourhood contacts	X	-	X?	X?
foreign popul. in % total popul.	X	-	X	X?
general friend relationships	X	-	X?	X?
membership of club or assoc.	X	-	X?	X?

trade union membership	X	-	X	X?
particip. In grass-root organisat.	X	-	X	X?
electoral participation	X	-	X	X?
subjective opinions	X	-	X	X?
% skilled workers	X	-	X	X?
% unskilled workers	X	-	X	X?
% low paid workers	X	-	X	X?
unemployment rate / by sex	X	X	X	X
social benefit dependency	X	-	X	X?
social protection benefit per pers.	X	-	X	-
social expenditure in % GDP	X	-	X	-

X = available in Eurostat databases or national statistic yearbooks

Xo = available in other national statistic studies

X? = partly available/found in Eurostat or national statistic yearbooks (for certain years or countries)

Xo? = partly available/found in other national statistic studies (for certain years or countries)

- = not available/found

3.2 Map Section

To represent and interpret the indicators on social integration and exclusion and to visualise their spatial dimension we produced several maps on the NUTS II level. Due to the lack of harmonised data on the regional level this was not possible for all indicators, but mainly for those regarding the population structure and the labour market.

For the representation of the available indicators and their values we chose to use two different types of maps:

On the one hand we used a **simple form of illustration** on the basis of percent-categories which shows the level of an indicator at a certain year for the regional (NUTS II) resp. national level.

List of maps

- Map 1: Population change 1990-1995 in %
- Map 2: Population 0-15 years in % of total population 1996
- Map 3: Change of population 0-15 years 1993-1996 in %
- Map 4: Population 60 and more years in % of total population 1996
- Map 5: Change of population 60 and more years 1993-1996 in %
- Map 8: Activity rate 1996

On the other hand we produced more complex, **two-dimensional maps**. The aim was to give

- evidence of the position which a certain member state has compared to the other countries (European cohesion) and
- on the other hand to show the regional disparities within a single country

We chose this design because we wanted to take into account that the structural, economic and social conditions in the individual countries are not the same and therefore a comparison of all the EU-regions along the European average value of an indicator does not seem to be appropriated.

In doing so the maps illustrate very well that even if we exclude the different conditions and systems (e.g. welfare system, traditions) in the European member states there are existing big differences between the regions of a country. As we can see these differences, and thus the differing situations regarding social integration and exclusion, appear most clearly between rural and urban regions, between structurally and economically weak and powerful regions and/or in regions at the (European) eastern border. In this regard the map on the GDP/inhabitant 1995 for example indicates the regional disparities between the northern and southern regions of Italy or the high GDP's in the urban regions (Ile de France, Berlin, Madrid, Uusima etc.) as well as the map on the change of the GDP 1990-1995 shows that in Italy (which has a negative GDP development) three regions register GDP increase rates,

which is against the national trend.

List of maps

- Map 6: Gross domestic product (GDP) per inhabitant 1995
- Map 7: Change GDP/inh. in % 1990-1995
- Map 9: Activity rate Women 1996
- Map 10: Unemployment rate 1996
- Map 11: Change of unemployed persons 1993-1996 in %
- Map 12: Share of female unemployed persons 1996
- Map 13: Change of female unemployed persons 1993-1996 in %
- Map 14: Share of long term unemployed persons 1996
- Map 15: Change of long-term unemployed persons 1993-1996 in %

How to read the maps

The specific position of a Member State compared with the EU-15 average can be identified by the (predominantly) colour (blue, yellow, red) which covers the whole country. On the vertical axes you see the categories of comparison with the EU-15 average. This is either an Index (EU=100) or a change rate (change rate in %).

The regional disparities within the countries are indicated by the saturation of the dominant colour. The categories on the horizontal axes refer to the national average. The referring value is either the index national average=100, or the average national change rate. The categories of the „change maps“ are divided in categories which follow the positive or negative national trend (average, below and above average) and one category that gives evidence of the regions with an opposite trend.

Annex Maps

!!!!!! Insert the maps send in a separate file as eps documents !!!!

3.3 Empirical Evidence of Social Exclusion and/or Integration

As it follows from the preceding chapters a wide scope of indicators is needed to describe the comprehensive dimensions of social integration and exclusion, in the course of which both, quantitative and qualitative indicators should be considered. Unfortunately we hardly find qualitative data and if we do, they are just available on the national level. With regard to the quantitative indicators we encounter almost the same problems: apart from the evidence that a 'one-dimensional' analysis of merely quantitative data can give, for a European-wide comparison of the phenomenon of social integration on a regional level we only have at disposal a reduced degree of comparable quantitative data. In addition also the application and interpretation possibilities of (harmonised) national data in many cases seem to be restricted, because the various political and legal conditions in the member states of the EU render more difficult the comparability.

Confronted with these restrictions - especially in relation to the regional level - we tried to

catch and to represent at least some of the aspects of social integration and its regional dimensions using the available data.

Our consideration of the phenomenon of social steps:

In a first step we define social groups - people, young and/or old people and homeless people - exclusion. The living and working situation of these social groups can be interpreted as a „general” indicator of the willingness and openness for social integration of a society.

In a second step the influence factors that induce social integration or exclusion are collected and summarised. On the one hand these factors are the results of the economic development (increase rates, structural change etc.) and on the other hand they derive from the social and political conditions and the value system of a society (welfare system, role of women, traditions, religion etc.).

The third step consists - with the background of existing studies - of the analysis of the regional dimension of social exclusion based on the results of the interpretation of the available data (see maps). In this connection it is important to point out again, that the available data on the European level (Eurostat data) at present allow only the „regional” analysis and representation of a small part of the phenomenon essentially the labour market.

The regional groups

Social integration and exclusion of so called „problem” groups and „minorities” can be measured in analysing if and in how far they have access and participation possibilities to re

the degree of social integration depends on several factors. Besides the various traditional and political value systems, the structural and economic developments and c as the resulting conditions are the main determinants and are reflected in the welfare system, the integration policies for minorities, foreigners or handicapped people etc..

In the following we will examine how the problem of access to eco the mentioned social groups presents itself in the European regions and on which factors it depends. Due to the difficult data situation the focal points of the observation will be the integration or exclusion phenomena within the labour market.

Social integration/exclusion of women

The labour market participation of women is determined by:

- the regional economic structure
- the traditions (family structure and size, religion and the r qualification)
- the social welfare system

- the conditions for combining profession and family

The **activity rate** is a measure for people of the working age potentially being economically active. It is affected by society's role models (combination of family and profession), general on.

A look at the European regions on the one hand shows a clear north-activity rates of women in Sweden and Denmark and low rates in Spain, Greece and Italy

rates in regions with great importance of the service sector, especially in relation to tourism (e.

all the East-German Länder is striking too. (Map 8 and 9)

Structural changes and insufficient job opportunities lead to **unemployment** regions particularly women are concerned with unemployment. The European average (EU 15) of the female unemployment rate of 1996 amounted to 12.4%, which means an increase from 1993 (11,9%) of 0.5 %points. The share of unemployed women of the total s 48.6% (Maps 12 and 13). While the share of unemployed women in Greece is particularly high, in the United Kingdom it lies clearly below the EU average. In this connection we should not forget that the interpretation of female unemployment data has also to take into account the 'hidden' unemployment. It is related to women that don't have a job but are still or again active in a different field (an „alternative role" e.g. household, agriculture) and therefore are not registered.

Another indicator for soci

level of education/qualification. In the European Union, participation in **education** consistently increasing in recent years. Women are now participating as much as males in post compulsory education. In both upper secondary and tertiary education, women have caught up with and, in some cases, overtaken men. While on the European level the

female rate in tertiary education is found in Germany. In other member states and

education (Social Portrait of Europe, 1998)

The importance of **earnings** indicator is noted in the Treaty of Amsterdam, specifically in relation to equality between the sexes. The following principle is set out in *Each Member State shall ensure that the principle of equal pay for male and female workers for equal wor*

The situation in the European Union is summed up in the 'Social Portrait of Europé' in the following way:

Gross earnings in most Member States showed a rise in real terms in the period 1980 1996, the biggest increases being in Finland and the United Kingdom. In the new Länder of Germany the wages have risen considerably since reunification as part of the process of

generally more evenly distributed in these countries, although the United Kingdom is one of

the countries with the most unevenly distributed earnings.

Part-time workers are usually female, often young and generally in low-status occupations, all of which tends to oppress their earning levels. They often reach averages just as little as 60 % of the hourly earning of full-timers.

Women earn less than men in all occupations. The smallest differences are found in the new Länder of Germany, Belgium, Luxembourg, and the Scandinavian countries. Even if allowance is made for structural differences, women's earnings remain below the 90 % of those of men in every Member State.

Depending on the respective Member State the net earnings represent anywhere between 53 % and 81 % of the gross earnings. These variations are the consequence of the fact that social security and taxation rates differ considerably between countries. The various family situations do not greatly affect social security contributions, but are important in the calculation of the taxes.

Minimum wages are currently in force in seven Member States, the highest (in Purchase Power Standard) in Luxembourg amounts to more than twice the level of the lowest (in Portugal). Minimum wages represent between 42 % and 59 % of the average salary in manufacturing industry.

Social integration/exclusion of immigrants/foreigners

The factors responsible for social integration/exclusion are

- attitudes and value system of a society
- cultural differences
- income situation
- level of education and qualification
- integration policy
- political and social participation

The total number of non-nationals living in the EU-15 is about 5 % of the total population, whereby around 40 % of these are EU-15 citizens, living outside their home country. Since the 1950s the proportion of non-EU nationals has increased steadily. In 1995 Austria (8 %) and Germany (6 %) had the greatest share of non-EU nationals. Most of them are immigrants from Turkey, the former Yugoslavia, and the Central European Countries. In other countries this proportion ranges from 1 % to 4 %. In Luxembourg EU non-nationals represent 29 % of the population, by far the highest percentage of the EU-15. Belgium is a distant second with 5 %. In the other Member states non-national EU citizens comprise less than 2 % of their population.

Immigration is a urban problem. A high percentage of the immigrants live and work in the urbanised areas because of existing relationships (e.g. family, national communities) and the perspective of a wider range of job opportunities. This concentration of immigrants leads to fundamental inner-urban problems and social conflicts, like low living standards, difficulties of supply, the formation of slums etc..

The access to the labour market is restricted for the immigrants and often is a result of their lower educational level as well as of discrimination/segmentation of the labour market. A large number of immigrants is employed as low skilled workers (even if they have a high education level) and the level of their income is significantly lower than for nationals. The percentage of foreign workers is traditionally high in regions with dominance of the service sector and/or in old industrial regions (e.g. textile).

Integration/exclusion of unemployed person

The participation of unemployed persons in the economical and social life very often depends on the level of their income from social transfers (social benefits) and from the attitudes of the society towards the unemployed. The more the society sees and understands unemployment as a personal problem and not as a result of economic developments and mechanisms (market forces), the harder is the integration of this social group.

The significant differences in the level of economic potential and power, activities, and growth rates determine the level and development of the unemployment. Therefore, the disparities which we find in different types of regions depend on:

- the regional economic structure (dynamic or old industrialised and monostructured regions, dominant tourism and/or service sector, predominantly agricultural regions)
- the geographic situation (border regions, coastal regions, islands, urban agglomerations)
- business cycles and/or consequences of restructuring processes (e.g. seasonal cycles in tourism, constructing, and agriculture; structural changes in industry and agriculture)

On the European level the data indicate that in the member states the development of unemployment is strictly related to the business cycle situation. In Austria, the Netherlands, Denmark and Portugal the level of unemployment in 1996 was remarkably below the EU-15 average, while in Finland, Ireland, Italy and France the unemployment rates were higher than the European average. Within the individual countries, on the one hand the predominantly agricultural regions or the regions with old and monostructured industrial areas are those where the unemployment rates are higher. In addition, the disparities between the new and old Länder of Germany are evident. (Map 10)

Between 1993 and 1996 we can observe a decrease of the number of unemployed persons in Finland, Denmark and the United Kingdom and big increases in most of the regions of Italy, Portugal, Belgium and Greece. Furthermore, compared to the European average the increases of unemployed persons in the Netherlands and in Spain were lower than in the other „increase,-countries (Map 11).

The indicator of the long-term unemployment (more than 12 month) gives evidence of the structure of unemployment. Long term unemployment is a 'male phenomenon' and a result of:

- restructuring processes (old industrialised regions)
- quantitative gaps between job opportunities and labour market supply in less developed countries (rural regions)
- qualitative gaps between labour supply and demand in metropolitan/urban regions

The maps show that the share of long-term unemployed persons in Italy and Belgium (highest) as well as in Spain, Portugal, Greece and Ireland lies above the European average. On the contrary in Scandinavia and Austria it is far below. Regarding the regional situation we can identify the following differences between the Northern and Central European countries and the Southern. In Northern and Central Europe the problem of long-term unemployment appears most of all in the industrial regions with weak structures and in urban regions, while in the South primarily the agricultural regions - in which diverse job opportunities and alternatives to farming and tourism are lacking - are concerned with it. Since 1993 the number of long-term unemployed persons has risen particularly in Finland, Germany and Portugal (Map 14 and 15).

Social integration/exclusion of young/old people

Social exclusion of young people can be measured and represented by their participation in the educational system and their educational level as well as by their access to the labour market. The chances for young people to enter the labour market, are strictly connected to the economical and business cycle situation, the job opportunities and also the relative national policy. Personal factors like the education level and the flexibility resp. mobility in technical (working fields) as well as in spatial respect are very important, too.

Social integration of homeless people

Homelessness is seen as a growing problem in the EU. The reasons for homelessness can be:

- family breakdowns
- rising unemployment
- reductions of social benefits (welfare system)

In a regional context homelessness in the first place is an urban problem, where the anonymity of relationships leads to social exclusion. In rural areas the homelessness most of the times can be relived and/or absorbed by existing family and social structures.

Social integration is, thus, a richly varied concept with a lot of dimensions - e.g. urban-rural relations, social exclusion, and segregation both between and within regions and cities. Other criteria have connections with unemployment, migratory movements, and demography - e.g. age, education and ethnic structure - and the qualifications of the labour force and the segmentation of the labour market. There are a lot of people who never get a foothold on the labour market. The growing share of immigrants and refugees are new problems especially in urban areas with a growing racism as one of the consequences. Different regions and cities have different problems with regard to the concept of social integration, but there seems to be an interest in developing common criteria even with regard to this concept. However, the development of social strategies and the realisation of measures are - today - hampered by a lack of knowledge regarding causes of the current problems and effective measures to combat them. The purpose of this part of the study programme is to find common criteria in the field of social integration or exclusion and then also to get a better understanding of the processes behind these phenomena that can be helpful in developing social strategies to combat social exclusion and support social integration.

From what is said above, table 2 comprises a list of indicators, subdivided into the two basic indicator sets and the five main areas of interest. Although based on a theoretical framework, they are modified to take access to those indicators into account. Hence, a number of indicators that are not be found within official statistics on the regional level have been excluded. However, some of the indicators available only at national level have been included. Some of these indicators could be derived also at a regional or even local level, but that would imply an access cost.

Table 12: **Summary of indicators**

demographic structure	
population density	inhabitants/sqkm; change
population change	population increase in %, change natural population increase in %, change
migration	foreign population in % of total population, change net migration in %, change gross flows in % (complementary or unilateral)
age structure	population 0-15 years in % of total population, change population 60 years and older in % of total population, change
households	average household size (number of people in a household), change proportion of extended households, change proportion of single households, change young adults living with their parents in % of population aged 20-29, change
economic structure	
GDP	GDP/inhabitant, change
industrial structure	proportion of employment in the different sectors, change
labour market	
employment	employment rate / by sex, change activity rate / by sex, change part-time employment in % of total employment / by sex, change proportion of foreign workers / by econom.sectors proportion of skilled and unskilled workers proportion of low paid workers number of child care institutions
unemployment	unemployment rate / by sex / by age, change unemployed persons by educational level in % of total unemployed people long-term unemployment in % of total unemploy. / by sex /by age, change segmentation and mismatch

Table 12 (Continued): **Summary of indicators**

<p>income</p> <p>income</p> <p>poverty</p> <p>affluence</p> <p>social benefits and social expenditure</p>	<p>average earnings / by sex, change household income per capita, change income distribution in deciles, change</p> <p>poverty rate (proportion of population below the income poverty threshold), change</p> <p>affluence rate, change</p> <p>social benefit dependency rate, change social protection in % of the total income, change social protection benefit per capita at prices, change social expenditure in % of total public expenditure, change social expenditure in % of GDP, change social protection benefits by functions, change</p>
<p>education</p> <p>students</p> <p>education level</p> <p>higher schools</p> <p>education expenditure</p>	<p>students in % of population aged 15-30 (20-30), change women in tertiary education in % of all people in higher education, change students in special schools for handicapped in % of all students</p> <p>persons by education level (3 ISCED levels) in % of the population aged 25-59, change illiteracy rate, change</p> <p>number of higher schools and universities, change</p> <p>national expenditure on education in % of GDP, change</p>
<p>housing and living conditions</p> <p>housing standard</p> <p>private housing expenditure</p>	<p>number of rooms per person, change number of rooms per household in % of all households, change dwellings with bathroom/shower, toilet in % of total dwellings, change proportion of households with housing problems (by sort of problem) proportion of homeless people</p> <p>housing expenditure in % of total household consumption expenditure, change</p>
<p>social cohesion and political resources</p> <p>relationships, memberships & participation</p>	<p>neighbourhood contacts general friend relationships membership of a club or association trade union membership electoral participation participation in grass-root organisations subjective opinions</p>

4. RESULTS AND AREAS OF POSSIBLE POLICY APPLICATION

Applying these indicators reveals a considerable **lack of suitable and harmonised data** below the national level for European-wide comparisons of the social situations. Data availability for the selected indicators makes first quantitative analysis viable only in the fields of demography, economic structure and labour market. All the other indicator sets show almost totally „**white holes**“ **at the regional level** and thus hamper any kind of quantitative analysis concerning the most interesting fields of observation at regional levels for the time being (see illustration *Data availability for the selected indicators* in the Annex).

Therefore, quantitative analysis on this stage of work had to be restricted to the indicator set where EUROSTAT provides regionalised data, i.e. to the labour market. Regarding the development of proper measures to combat social exclusion it is necessary to gather information about the form/structure of social integration/exclusion and to analyse the specific regional level on which it is taking place. Therefore, the chosen indicators are applied to different regional levels - the national level and NUTS II - and different types of NUTS II-regions (see the *maps Unemployment, Change of unemployment and Activity rate of women* in the Annex as three examples for that).

Reviewing the experiences approaching the task of describing social integration/exclusion by indicators on the European level so far can be put into three slogans as follows:

- lacking conceptual basis
- lacking viable data basis
- lacking empirical experience

In this context it has to be mentioned that the *European Spatial Development Perspective (ESDP)* finally does not give any evidence to the issue of social integration/exclusion.

Regarding **areas of possible policy application** there has to be made clear that because of the preliminary character of the results (due to the lacks mentioned above) there is no way for straight *policy application* as far as Community or intergovernmental policies (e.g. labour market) are concerned.

As far as the **ESDP Action Programme** (adopted at the Ministerial Meeting in Tampere on 4-5 October 1999) can be considered a kind of a (spatial planning-) *policy* instrument, there can be identified some areas of major concern. However, taking into consideration the wordlessness of the ESDP this only applies under the condition that there is an equivalent agreement about what is to be understood by *social integration/exclusion* when dealing with it on the European level.

- At first it applies to the *action 2.2.1 Establishing the ESPON co-operation*, of course. Just the revelation of how much work has to be done, in advance before being able to establishing a joint indicator system, can be taken as a central argument for this *action*.

- In addition there may be some relevance for *action 2.1.3 ESDP policy orientations in national spatial planning*, not least because more actual taking into account of the issue by national spatial planning could help to clarify the relevance on the European level.
- In the long term perspective there are important areas of concern with the *actions ESDP policy orientations in Structural Funds mainstream programmes*
Spatial impacts of Community Policies
Spatial impacts of enlargement on EU Member States and non-Member States

However, concerning these cases the relation seems to be - from the point of view of prior steps of work for the time being - less a *possible policy application* of indicators to *the areas*, rather than the other way round the necessity of some basic research (and thesis agreement) on the question in which way *the areas* impact social integration/exclusion.

5. FUTURE WORK

If - in spite of the wordlessness of the ESDP concerning that issue or may be even because of that - social integration/exclusion is considered to be kept as a major task for observation on the European level, obviously much more conceptual and analytical preliminary work than in other areas has to be done, before starting with the actual indicator exercise. This has also been proved by the literature looked at. Documents dealing with social integration issues usually end underlining the shortcomings in available information, the lack of a theoretical basis and suitable indicators.

Assuming the necessity to overcome the preliminary results within this study programme and to come up with suggestions for feasible steps of work to be done in a next period of networking the preliminary results in this paper have to be seen as - and prove to be - a starting point for further development of the topic.

Tackling the issue of developing indicators for the description of social integration/exclusion from a European spatial planning point of view, opens a broad variety of possibilities for continuation of the work. They may be split up in **two basic tasks**:

- (a) developing the **theoretical concept** of what is meant by social integration/exclusion at the different levels of spatial analysis and planning in the context of different levels of societal structures
- (b) elaborating **methodological** tools and procedures for quantitative (as far as possible) and qualitative description and assessment of the phenomenon

Concerning (a) it has to be mentioned again that *the European Spatial Development Perspective (ESDP)*, which is considered the basis and starting point of the whole indicator project within the Study Programme in European Spatial Planning, does not give viable guidance regarding social integration/exclusion at all.

Working on that subject matter within a network representing the Member states and the Commission as well - with their different responsibilities and interests - means, that task (a) is to be considered a very ambitious one, in terms of professional work including a set of **agreements both on theoretical and political objectives.**

Concerning (b) the present report reveals very clearly the insufficient data material⁶. But among the results of the analysis of data availability the column *Not harmonised data on national level* can be considered promising. Following the logic of the approach chosen the next steps should be

- to clarify the possibilities of **harmonisation of non-harmonised existing national data** for national and regional levels
This could be done by a combination of the tools *questionnaire* and *working group* using the framework of the existing network of *National Focal Points* in order to achieve a new standard of data availability (beyond the existing data resources of EUROSTAT).
- to elaborate methods of generating additional proper quantitative and qualitative regionalised information about the subject matter
This could be done by using the existing network of *National Focal Points* for methods of qualitative **experts assessments** of the European regions concerning social integration/exclusion settings.

But before starting any of these steps, a general conceptual framework - so far still lacking - of the overall *Indicator Theme* has to be developed. It is necessary to know much more about the specific purpose the indicators have to be elaborated for.

Reflecting and reviewing the list of the *Indicator Subthemes* which has not happened so far, has to be at the latest now among the priority items of any proceeding agenda. The first attempt to combine the indicators elaborated so far⁷ revealed the considerable problems with a set of subthemes within which is not only some overlapping but presumably kind of hierarchical relations⁸.

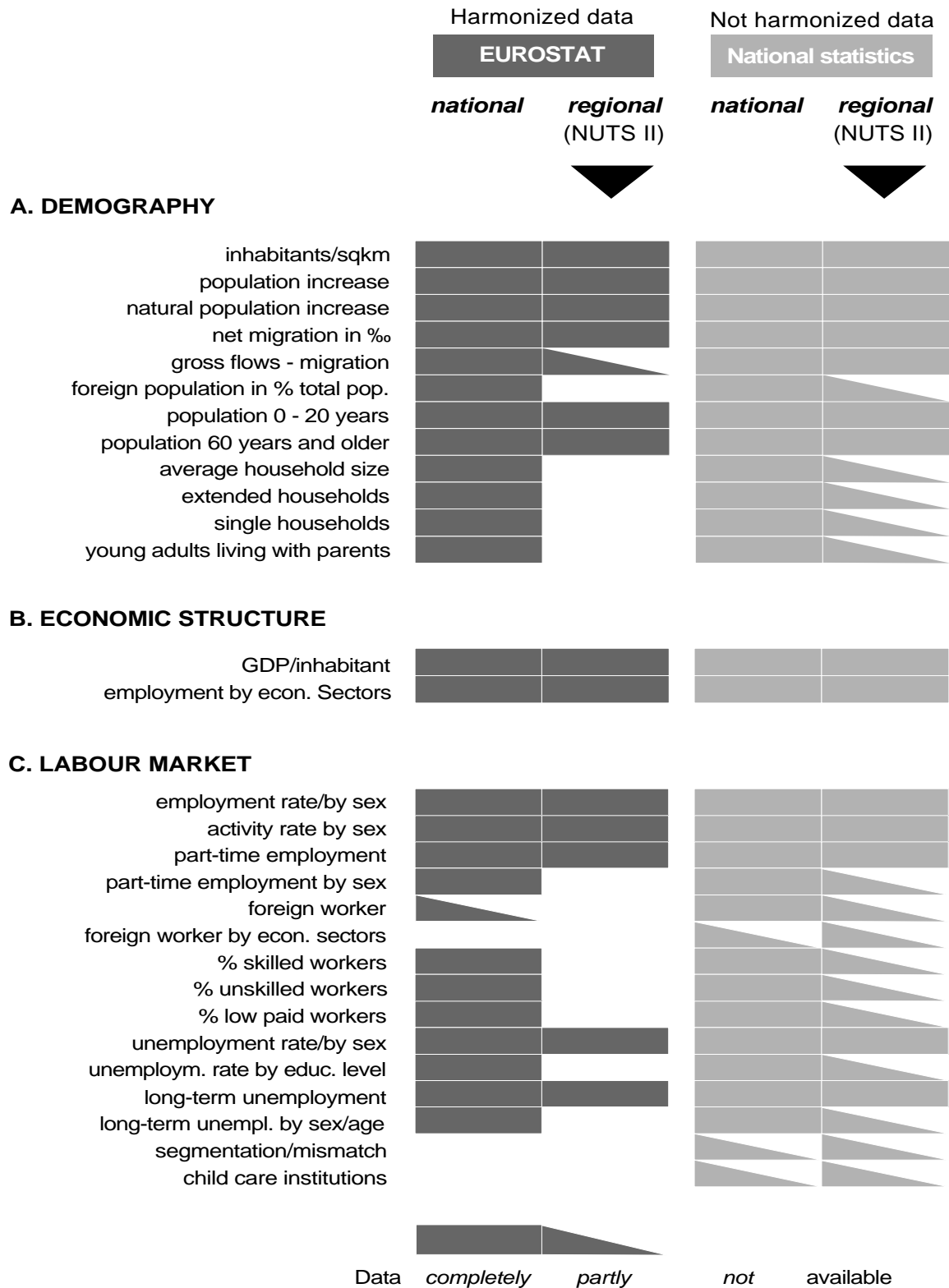
⁶ see the illustration *Data availability for the selected indicators* in the Annex

⁷ presented by the German NFP at the meeting in Rome

⁸ in particular this applies to Subtheme 1.4 *Spatial integration*, what is proved by arguments developed there

ANNEX

Data availability for the selected indicators



Data availability for the selected indicators (continuation)

	Harmonized data EUROSTAT		Not harmonized data National statistics	
	<i>national</i>	<i>regional</i> (NUTS II)	<i>national</i>	<i>regional</i> (NUTS II)
D. INCOME				
average earnings/by sex	■	▴	■	▴
household income per capita	■	■	■	▴
income distribution in deciles	■	■	■	▴
poverty rate	■	■	■	▴
affluence rate	■	■	■	▴
social benefit dependency	■	■	■	▴
social protection % of income	■	■	■	▴
social protection benefit/person	■	■	■	▴
social expenditure in % GDP	■	■	■	▴
social protection benefit by function	■	■	■	▴
E. EDUCATION				
students in % of 15-30y. pop.	■	■	■	■
women in higher education	■	■	■	■
stud. in schools f. handicapped	■	■	■	▴
persons by educ. level 25-59y	■	■	■	▴
illiteracy rate	■	■	▴	▴
higher schools and universities	■	■	■	▴
education expend. In % GDP	■	■	■	▴
F. HOUSING AND LIVING CONDITIONS				
number of rooms/person	■	■	■	▴
number of rooms/household	■	■	■	▴
dwellings with bath/shower/WC	■	■	■	▴
homeless people	■	■	▴	▴
housing expenditure in % of households consumption exp.	■	■	■	▴
G. SOCIAL COHESION AND POLITICAL RESOURCES				
neighbourhood contacts	■	■	▴	▴
general friend relationship	■	■	▴	▴
membership of club or assoc.	■	■	▴	▴
trade union membership	■	■	▴	▴
particip. In grass-root organis.	■	■	▴	▴
electoral participation	■	■	▴	▴
subjective opinions	■	■	▴	▴
	■	▴	not available	available

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