

Measuring Social Inclusion

Social inclusion is a complex and multidimensional concept that cannot be measured directly. To represent the state of social inclusion in European countries a number of different factors need to be taken into account, the selection of which is not always obvious. Ideas about social inclusion change over time and between different cultures. Objectives identified to improve social cohesion and the priorities set may change among people and according to political trends. In establishing the European Year for Combating Poverty and Social Exclusion, the European Parliament and the European Council stated that:

The problem of poverty and social exclusion has broad, complex and multidimensional forms. They relate to a large number of factors, such as income and living standards, the need for educational and decent work opportunities, effective social protection systems, housing, access to good quality health and other services, as well as active citizenship. (European Parliament, Council of the European Union 2008)

Measuring a complex concept such as social inclusion is always challenging as the concept never coincides with the measure. This is true, firstly, because the measures of social inclusion (e.g., poverty, employment, literacy, etc.) are clearly definable, but hardly able to represent the complexity of the concept and, secondly, because the measures we believe are most useful are not always available.

Therefore, measuring social inclusion poses two major difficulties:

- **In its definition:** to define social cohesion and identify the dimensions that compose it so as to provide a framework for the indicators to be used; and
- **In its indicators:** to identify a number of indicators for which data are available for most European countries and that are able to represent relevant aspects of the different dimensions of social inclusion.

In the following section we have tried to overcome these obstacles as far as possible. With respect to the identification of the determinants of social inclusion, the approach used in this report follows that of the European institutions. Nevertheless, more dimensions of inclusion are adopted than used by the Commission (which considers mainly poverty, employment, social transfers and health) (European Commission 2008) or contained in the Social Inclusion Indicators used by Eurostat (2010).

For the purpose of this report, seven dimensions of social inclusion are analysed: poverty, employment, education, health, gender, living conditions and social participation. In this way we have attempted to represent the multidimensionality of social inclusion by splitting a complex concept into a number of determinants that may somehow represent the different elements of social exclusion.

With the dimensions identified, the next step is to select the available indicators able to represent them. In this task it is common to face some constraints in relation to the choice of indicators. It is important to stress that when comparing information among countries it is essential that the numbers are comparable and that the phenomenon is measured in the same way across the different countries being compared. This is assured by the use of one source of data for each indicator. Thus, only information already produced by international organisations is used in the analysis.

As we looked for indicators relevant to European countries (intending Europe in its proper geographical sense of 52 countries, not just the EU27 countries), most of the data is produced by UN agencies, ILO and the World Bank. When good coverage was not available, data from Eurostat or OECD was used, which obviously covers only a limited number of countries. Data availability is by far the biggest limitation on the effective representation of complex phenomena such as social inclusion. Nevertheless, a set of more than 40 indicators was selected, providing a broad picture of social inclusion in Europe.

To show the complexity of social inclusion, and in particular of social cohesion, it is important to supplement objective indicators with subjective information. Citizens' perceptions are difficult to compare among countries because of different cultures and languages, which can lead to the different interpretation of the same word; nonetheless, perceptions can be a powerful tool in evaluating phenomena that cannot be measured objectively, such as personal satisfaction with life or trust in neighbours. These aspects may be much more relevant in determining social cohesion and wellbeing than financial availability or the accessibility of public services. Yet these are also aspects in which policymakers can hardly intervene. Policymakers should, therefore, stay focused on income distribution, employment, the quality of services and the promotion of equal opportunities for all.

The large amount of information collected here provides a complex framework from which a number of general conclusions are apparent:

1. The economic crisis has hit all European countries resulting in a massive loss of jobs across the continent. The worst affected appear to be the Baltic states and Spain. Macedonia has the highest level of unemployment, but is the only country, together with Turkey, that has experienced a reduction in unemployment rates.
2. Important differences among European countries still exist in education standards (with very low enrolment in tertiary education in Caucasic republics and the Balkans) and in access to the Internet, which is increasingly becoming a prerequisite for inclusion, with the extreme case of Azerbaijan where only 10% of the population has Internet access.
3. Health statistics differ significantly in Europe. Life expectancy varies from 61 years for Russian men to 84 years for French women. Many countries still have high maternal and child mortality rates.
4. There is a lot of room for improvement in gender equity in many countries. This is particularly true in relation to the participation of women in economic activities, for which Italy, Malta and Turkey rank lowest, and in relation to the presence of women in positions of power. Women hold almost no relevant managerial or political positions in Armenia, Albania and Bosnia.
5. Social expenditure is very low in a number of countries, representing less than 30% of all revenue. In some countries, such as Russia and Armenia, social expenditure is less than 20%.
6. Social participation and trust is also very variable among countries: 74% of Norwegians believe that “most people can be trusted”, while only 10% of people in Cyprus feel the same; 65% of Romanians “would never attend a peaceful demonstration”, compared to only 21% of people in Sweden.

References

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