IS1102 SO.S. COHESION - Social services, welfare states and places

A critical overview of the European Union policy framework for social services. Agendas, regulation and discourses

EUROPE

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COST Action IS1102 SO.S. COHESION - Social services, Welfare State and Places

The restructuring of social services in Europe and its impact on social and territorial cohesion and governance

In the last 20 years social services have experienced significant restructuring throughout Europe, involving cuts in public funding, devolution (from central to local governments), and externalisation (from public to private providers). Among the reasons for such changes have been stressed the fiscal crisis of the State (on the supply side) and the need to ensure greater efficiency, wider consumer choice and more democratic governance (on the demand side). Although relevant research is available on such processes, the recent global financial crisis and the awareness that, among services of general interest, social services are a major vehicle of social and territorial cohesion have brought social services back on the EU agenda.

The Cost Action IS1102 – operational from 2012 to 2015 – has brought together institutions carrying out research on these themes in different nations, from different disciplinary points of view, and with different emphases, with a view to jointly assess the effects of the restructuring processes, from 5 perspectives: a) efficiency and quality; b) democratic governance; c) social and territorial cohesion; d) training and contractual conditions in social work; e) gender and equal opportunities. The Action has provided a structured comparative context to share and valorise existing knowledge with the purpose of disseminating findings at the local and international scale and identifying inputs for a European social policy platform.

Some of the output of the Action is published in the form of *COST IS1102 Working papers*, freely available for consultation on the Action's website. While acknowledging the key role of the Cost Programme in general – and of the IS1102 Action in particular – in favouring the production of these papers, the responsibility of their contents remains with the authors.

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Stefania Barillà, José Luis Gómez-Barroso and Ivan Harsløf[*]

ABSTRACT

This paper aims at assessing the EU's emergent policy framework concerning social services within the larger field of social protection and social inclusion. At the turn of the millennium, it seemed that the conditions for a leap forward towards a more social union were in place, but it soon became clear that the EU is still travelling essentially on economic rails. Indeed, social services are integral to the current strategy, as represented by the Social investment package and the Platform against poverty. Yet, beyond the very ambitious and redundant multitudes of discourses, objectives, priorities, flagship initiatives and so on, an ambivalent stance and a number of structural tensions permeate the EU social policy framework and especially the initiatives more specifically geared to social services. The very ambitious goals are not supported by actual financial means; a tension remains between the attempt to set up a European regulatory framework and national sovereignty in the social domain. Moreover, there seems to be a contradiction between competition policy applied to services and the right to welfare involved in social services. These unsolved tensions are likely the result of compromises in a geopolitical region accommodating different welfare state models, entailing different approaches, goals, and interests.

[*] Although the paper is the product of a close collaboration among the three authors, the Introduction was written by José Luis Gómez-Barroso and Ivan Harsløf, Section 2 should be attributed to Stefania Barillà, Section 3 should be attributed to José Luis Gómez-Barroso, whereas Section 4 should be attributed to Ivan Harsløf. The Conclusions are obviously shared.

1. Introduction

For half a century, social services were out of the roadmap leading towards an integrated European Union. Although the European Social Charter signed at Turin by the member States of the Council of Europe on October 1961 established that 'everyone has the right to benefit from social welfare services' (Council of Europe, 1961, Article 14), the near-contemporary Treaty of Rome did not include any reference to social services or social inclusion. Neither did the successive treaties. The project for a European Constitution would have introduced a generic article 'recognising and respecting the entitlement to social services' (OJEU, 2004), but the constitution was not realised. It was not until the 2007 Treaty of Lisbon when an article establishing that the Union 'shall take into account requirements linked to the guarantee of adequate social protection' was introduced. Later, the Charter of Fundamental Right of the European Union of 2012 recovered the article incorporated in the failed project for a European Constitution. It recognised, using exactly the same wording, the entitlement to social services 'providing protection in cases such as maternity, illness, industrial accidents, dependency or old age, and in the case of loss of employment' as well as a 'right to social and housing assistance so as to ensure a decent existence for all those who lack sufficient resources' (Articles 34.1 and 34.3).

The recent acknowledgement of social services does not mean, however, that social services have now become a priority in the political agenda of the European Union. In the 22 pages of the present president of the European Commission, Jean-Claude Juncker's opening statements in the European Parliament plenary session, only a remotely close reference to social services can be found[1]. After almost sixty years of work for a European integration, social services keep being regarded mainly as a national affair. Indeed, the consolidated Treaty on the Functioning of the European Union clearly characterises the role of the Union as only complementary to the national efforts (EC, 2012b, Article 153.1).

In spite of all the above, it is possible to talk, particularly with the turn of the century, about a European policy for social services. Or being more precise, it is possible to find a tangled set of policies whose goals are, in a broad sense, related to social inclusion. The even more tangled actions, plans, tools, and budgets linked to those policies have an impact (at least potential) on the local provision of social services. It is even possible to talk about a regulation of social services. During the last ten years, the shape of the so-called *social services of general interest* has been defined through soft law documents. This construct has been used to establish a series or rules regarding internal market questions about the application of competition policy to public service providers, and about the management of public funds.

All these initiatives constitute, broadly speaking, the EU framework for social policy, whose analysis and critical assessment is the objective of this chapter. The structure of the paper is as follows: The evolution of the Commission activity on social issues (Chapter 2) is followed by the study of the present regulation of social services of general interest (Chapter 3) and of the present social policy agenda (Chapter 4). An assessment of the discourses and ideological tenets underlying EU initiatives (Chapter 5) precedes some concluding remarks.

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[1] 'I would have liked to spell out my belief that services of general interest and public services should be safeguarded and cannot be subject to the fashionable whims of the day. Let us stand up for public services in Europe!' (Juncker, 2014, p. 21).

2. Strategies, funds and programmes for social services

During the early years of European integration, social policy consisted almost exclusively of efforts to secure the free movement of workers (Falkner, 2009). The first of a number of social action programmes was draw up in 1974 in response to a mandate issued by the Heads of States meeting in Paris on October 1972. The three main goals were: the attainment of full and better employment in the Community, the improvement of working conditions, and the increased involvement of management and labour in the economic and social decisions of the Community. Almost contemporary (1975), a first anti-poverty programme –including a common definition of poverty– has been considered as another of the initial milestones of social inclusion policies (Eurofound, 2015). Fifteen years later, following adoption of the Community Charter of the Fundamental Social Rights of Workers in December 1989, the Commission again drew up a new social action programme aimed at implementing the Charter. This was followed by the launch of the Green Paper on the future of European Social Policy (1993), and of the White Paper on European Social Policy (1994), and of the subsequent social programme 1995-1997 in which for the first time, apart from work conditions and equality of opportunity, a framework initiative 'to stimulate a process of joint medium-term reflection on the future of social protection' was launched. The ambitions of the next (1998) social programme have to be placed in the context of monetary union and the moves towards further enlargement of the Community (Neal, 1999).

In spite of what was written in programmes, as stressed by Pierson and Leibfried at the time, 'what is emerging is a multileveled, highly fragmented system in which policy "develops" but is beyond the firm control of any single political authority' (1995, p. 433). Indeed, the first significant development in European social policy did not take place until 2000 when, as a way of addressing the social element of the Lisbon strategy, the EU and its Member States agreed a European social policy agenda.

2.1 The evolution of the EU social policy agenda: from the Lisbon strategy to Europe 2020

From the 'new' to the 'renewed' social policy agenda

The evolution of the Lisbon strategy can be summarized in terms of three phases (see Table 1): the launch of a 'new' agenda in 2000, called the 'Lisbon I period' (2000-2004) and the 'renewed' agenda launched in 2005, in turn divided in two cycles, the 'Lisbon II period' (2005-2008) and the 'Lisbon III period' (2008-2010) (Agh, 2010).

The first period (Lisbon I) began with the 'new' EU strategy being set out at the European Council meeting in Lisbon in March 2000. At the beginning, the strategy featured a very ambitious ten-year reform programme. The key strategic goal was to 'become the most competitive and dynamic knowledge-based economy, capable of sustainable economic growth with more and better jobs and greater social cohesion' (EC, 2000, p. 2). Among other actions, achieving this goal involved implementing measures aimed at 'modernising the European social model, investing in people and combating social exclusion' (EC, 2000, p. 5). This strategy was a pillar of the 'new' European social policy agenda (SPA). It was considered 'new' because it marked a change in paradigm, from an approach that considered employment policy, market policy and macroeconomic policy separately, to an integrated vision with new tools (Decaro, 2011, p. 36). A key principle inspiring the new agenda was that it would 'strengthen the role of social policy as a productive factor' (EC, 2000, p. 5), which fully reflected the new 'social investment' approach adopted by the EU in the late 1990s (Hemerijk, 2012).

Regarding the implementation mechanisms, in which the European Council intended to take a pre-eminent guiding and co-ordinating role, this first period saw the introduction of several governance tools: the open method of co-ordination (OMC), a means of spreading best practice and obtaining the highest level of convergence without enforcing regulation; the *Spring European Council* and related report, a meeting to be held every spring to monitor progress in implementing the Lisbon strategy, and the *Broad guidelines for economic policies* (BGEPs).

However, from the beginning the 'new' SPA was fraught with a number of shortcomings. According to observers it was extremely ambitious, but it did not consider the competitive challenges from the global economy. Moreover, the goals were rather generic, often redundant, and at the same time inconsistent. Finally, the means by which these goals were to be achieved were not specified, while the inertia of Member States further hampered their implementation (Decaro, 2011). As early as 2004 the outgoing Commission President Romano Prodi declared in an interview with the *Financial Times* that 'Lisbon was a big failure' (Parker and Barber, 2004).

The second period (Lisbon II) inaugurated the 'renewed' agenda, which was set out in the Commission's mid-term review of the Lisbon strategy at the Spring European Council of 2005. Following the recommendations of the Kok report of 2004,[2] the European Council decided to refocus the agenda on growth and employment, while giving more responsibilities to Member States. To promote this new agenda, the EU adopted a set of 24 *Integrated guidelines (IGs) for growth and jobs*. The main novelties of this second cycle included the following provisions. 1) Member States had to prepare a three-year national reform programme (NRP) and adapt the strategy to national contexts. 2) This reform programme was to be complemented by the Community Lisbon programme (CLP) at the European level, which for the first time brought together measures in the regulatory domain, financial instruments, and specific proposals for policy development.

The third period (Lisbon III) was launched at the spring Council of 2008. This third cycle (2008–2010) introduced minor adjustments to the existing set of 24 IGs, focusing especially on their implementation (Butković and Samardžija, 2010). It stressed that social policy should not remain confined to traditional social domains and had to be cross-cutting and multidimensional, covering a wide range of areas from labour market policies to education, health, immigration, and intercultural dialogue (EC, 2008a, p. 3). For the first time, it also emphasized the connection between the Lisbon strategy on the one hand and the resources of the cohesion policy on the other.

[2] In March 2004, former Dutch Prime Minister Wim Kok was mandated by the European Council to lead a group of experts in a review of the Lisbon strategy.

Table 1. Main steps of the Lisbon Strategy implementation (2000-2010)

Periods	Date/Event/Authority	Contents	Governance tools
Lisbon-I (2000-2004)	**23-24 March 2000** Lisbon Council (extraordinary) *Lisbon Strategy (LS)*	The LS sets out to make Europe the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth, with more and better jobs and greater social cohesion. Two 2010-targets 2010: an employment rate of 70 %, including a female employment rate of 60 %.	OMC, Multilateral surveillance, Broad economic policy guidelines BGEPs, Report of Spring European Council
	November 2004 European Commission *Kok Report*	The Kok review concluded that even if some progress was made, most of the goals of the LS were not achieved.: 'The European Union and its Member States have themselves contributed to slow progress by failing to act on much of the Lisbon strategy with sufficient urgency. This disappointing delivery is due to an overloaded agenda, poor coordination and conflicting priorities. Still, a key issue has been the lack of determined political action' (HLG, 2004: 6)..	Expert evaluation
Lisbon-II (2005-2008)	**22-23 March 2005** Brussels Council *LS mid-term review and implementation*	Mid-term review of the LS: new orientation of priorities towards growth and job; integrated approach to coordination of economic policies and employment.	Three-year planning cycle based on: Integrated Guidelines, Community Lisbon Programme (CLP), National Reform Programmes (NRPs) and Annual Reports on their implementation, Multilateral surveillance, Annual Report of the Commission on the implementation of LS, assessments, recommendations and *points to watch* proposed to the Council that approves them in the Spring Session, Strategic Report of the Commission at end of cycle .
	July 2005 European Commission *Common Actions for growth and employment: CLP 2005-2008*	The policy measures proposed under this programme fall under three main areas: 1) supporting knowledge and innovation; 2) making Europe a more attractive place to invest and work; 3) creating more and better jobs.	
	January 2006 European Commission *1st Progress Report of LS 'Time to move up a gear'*	Four priority action areas: 1) investment in education, research and innovation; 2) freeing up small and medium-sized enterprises (SMEs); 3) employment policies to get people into work; 4) guaranteeing a secure and sustainable energy supply.	
	December 2006 European Commission *2nd Progress Report of the renewed LS 'A year of delivery'*	Checks the results achieved until 2006. The report invites the Council to formally adopt country specific recommendations designed to guide the reform efforts of Member States.	
	December 2007 European Commission *Strategic Report 2007 on the renewed LS for growth and jobs 'Keeping up the pace of change'*	Highlighs the results of the first programming cycle (many positive results); starts the new programming cycle (2008-2010) confirming the 24 integrated common strategic guidelines of 2005-2008 and the four priority action areas. Linking LS and the Cohesion Policy.	
Lisbon-III (2008-2010)	**December 2007** European Commission *Commission proposal for the Community Lisbon Programme 2008-2010*	10 key objectives: Social Agenda; Immigration; SMEs; administrative burdens; Single Market; 'fifth freedom'; innovation; energy and climate change; sustainable development; Doha multilateral trade negotiations.	
	December 2007 European Commission *Communication 'Member States and Regions delivering the Lisbon Strategy for growth and jobs through EU Cohesion policy, 2007-2013'*	Puts Cohesion policy at the centre of the LS.	Integration between the Community Strategic Guidelines on Cohesion (CSGs) and the Integrated Guidelines; *earmarking* part of the financial allocations for investments with the potential to make a significant contribution to realising the Lisbon objectives.
	13-14 March 2008 Brussels Council *Approval of the proposed CLP 2008-2010, the Integrated Guidelines 2008-2010 and Recommendations by country*	Start of the second programming cycle.	In October 2008, Member States confirmed, updated or drew up new NRPs, which were submitted to the Commission together with a report on their implementation.

Source: Authors' own compilation, based on Crescenzi, 2011, Appendix.

The Europe 2020 Strategy

As anticipated in European Communication – COM (2008)412 (EC, 2008a), the social policy agenda and the Lisbon strategy were re-examined at the end of the decade, to consider the 'new challenges' faced by the EU and the aftershocks of the financial crisis, and to launch a new strategy. The document entitled *Europe 2020: A Strategy for European Union Growth* indicated that the European Union (EU) currently faces a moment of transformation, resulting mainly from globalization, climate change and demographic ageing. In addition, the 2008 financial crisis has challenged the social and economic progress made by EU countries. The economic recovery that started in 2010 must be accompanied by a series of reforms to guarantee the sustainable development of the EU in the coming decade (EC, 2008a; EC, 2010e; EC, 2014a).

Europe 2020 explicitly placed social policy at the core of the EU economic strategy (EC, 2013c). As shown in Table 2, the strategy includes seven flagship initiatives, three priorities and five objectives. The 'Fight against poverty' objective, which is closely related to the 'Inclusive growth' priority and the 'European Platform against Poverty and Social Inclusion' flagship initiative, is central for both social policy and the social component of cohesion policy.

Europe 2020 also sets out a number of 'tools', mostly for the purposes of monitoring and co-ordination (EC, 2013c):

- The *European semester*, a new institutional process that aims to provide EU Member States with ex-ante guidance on fiscal and structural objectives (Hallerberg et al., 2011).
- The *annual growth survey* (AGS), which begins the European semester, launched the annual cycle of economic governance and sets out general economic priorities for the EU, while providing Member States with policy guidance for the following year (EC, 2014b).
- The *open method of coordination* (OMC), which was reconfirmed and its role in social protection and social inclusion, contributing to steering structural reforms in social policy areas, was to be reinforced.

Table 2. Objectives, priorities, and flagship initiatives of the Europe 2020 strategy

5 objectives	*5 Objectives* are associated to clearly quantified *headline targets*: 1. *Employment* must reach 75% of the 20-64 year olds; 2. *Investment in Research & Innovation* must reach 3% of the EU's GDP; 3. *Climate change and energy*: greenhouse gas emissions must be 20-30% lower than 1990; 20% of energy must be derived from renewable sources, and a 20% increase in energy efficiency must be achieved; 4. *Education*: the rates of early school leaving must be reduced to below 10% and at least 40% of the 30-34 year olds must complete third level education; 5. *Fight against poverty*: the EU must succeed in reducing by at least 20 million the number of people in or at risk of poverty and social exclusion.
3 priorities	These objectives correspond to *three priorities* (mutually reinforcing each other): I. *Smart growth* (developing an economy based on knowledge and innovation); II. *Sustainable growth* (promoting a more resource efficient, greener and more competitive economy); III. *Inclusive growth* (fostering a high-employment economy delivering social and territorial cohesion).

7 flagships	These priorities are then connected with *seven flagship initiatives*: *I. SMART Growth:* 1. Digital agenda – the EU's strategy to help digital technologies, including the internet, to deliver sustainable economic growth; 2. Innovative Union – turning ideas into jobs, green growth and social progress; 3. Youth on the move – to study, learn, train and work. *II. SUSTAINABLE Growth*: 4. Resource-efficient Europe – supporting the shift towards a resource-efficient, low-carbon economy to achieve sustainable growth; 5. Industrial competitiveness – an integrated industrial policy for the globalisation era to support a strong, diversified and competitive industrial base. *III. INCLUSIVE Growth*: 6. Agenda for new skills and jobs – improving flexibility and security in the labour market, skills, quality of jobs, working conditions and conditions for job creation; 7. *European Platform against Poverty and for Social Inclusion* – mainly the responsibility of national governments; EU support via best practice, mutual learning, EU-wide rules and funding.

Source: Authors' own compilation, based on EC, 2010e and other EU documents.

Compared to the Lisbon strategy (Table 3), the goals of *Europe 2020* were more articulated and somewhat less high-sounding. Moreover, social inclusion now figured more prominently. The 'Social investment' approach was strengthened, as well as the tools to monitor and guide member states. On the other hand, although more cautious, goals remained rather ambitious (Lundvall and Lorenz 2012, p. 334).

Table 3. A comparison between the Lisbon Strategy and the Europe 2020 Strategy

Differences		Lisbon Strategy 2000-2010 (3 periods of Social Policy Agenda)	EU 2020 Strategy 2010-2020 (a 10-year strategy)
Origins & process	Who	Portugal was initiator and driver (P.M. A. Gutierrez)	Designed 'in-house' by the European Commission
	When	**A long period of elaboration (more than 2 years each)** Prepared over a long period, during which the Portuguese government consulted national governments and involved international experts	**A short period of elaboration (about 6 months)** Presented in the EP in the autumn 2009; then EC invited the public to give comments/proposal via web. Final version presented in March 2010
Context		**Unsatisfactory economic performance (1990s)** USA 'new economy *vs* Europe 'rigidities' and underinvestment in research.	**Financial crisis (2008)** Both USA and Europe suffer from the consequences of the financial crisis; ecological crisis is also high on the agenda. The major competitive challenge comes from China and India rather than from USA.
Contents		**Ambitious** The strategic goal was: 'to become the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion'. Introduces 'Social Investment' approach	**Ambitious, but more cautious** There is no promise that Europe will become the most competitive region of the world and it is realised that the economic crisis has had a major negative impact upon employment and income. The social dimension more prominently on the agenda. Confirms 'Social Investment' approach. Still quite ambitious.

Source: Authors' own compilation based on Lundvall and Lorenz, 2012, p. 334.

2.2 The Directorates General (DGs), Structural funds, Initiatives and Thematic objective related to the social policy domain

With the launch of Europe 2020, all EU funds and programmes were now to comply with the new strategy. Of particular importance were the changes introduced in the European Structural Funds, the main financing tool of the European Cohesion Policy (see Figure 2). The two Directorates General (DGs) most directly involved in funding and implementing social policy were DG-EMPL (Employment, Social Affairs and Inclusion) and DG-REGIO (Regional and Urban Policy).

DG-EMPL is entrusted with all matters in the domains of employment, social affairs and social inclusion (EC, 2013d, p. 4). More specifically it is responsible for: i) *social investment* activities, (active inclusion and social innovation, investing in children, housing, active ageing, social services of general interest); ii) *social protection* activities (poverty and social exclusion, health care, long-term care, pensions). It is also responsible for the *European social fund (ESF)*, one of the European Structural and Investment Funds, specifically targeted to improving the employment opportunities and standard of living for workers in the internal market (Article 162 of the TFEU – Treaty of the Functioning of the European Union) and to strengthening the EU economic, social and territorial cohesion (Art. 174 TFEU). With Europe 2020, the activities of DG-EMPL have been significantly re-oriented towards increasing social inclusion, also through the provision of social services. Its two main tools are the 'European platform against poverty and social exclusion' and the 'Social investment package'.

The *European platform* is one of the seven flagship initiatives of the Europe 2020 strategy, designed to help EU countries reach the very ambitious headline target of lifting 20 million people out of poverty and social exclusion. As shown in Table 4, the European platform features five areas of action (EC, 2010b; 2015), two of which are directly relevant for social services: a) *Delivering actions to fight poverty and exclusion across the policy spectrum*, among which the 'Social protection and access to essential services' action explicitly addresses services, especially long-term care and active ageing, as well as social innovation; b) *Making EU funding deliver on the social inclusion and social cohesion objectives of Europe 2020,* among which the 'Developing an evidence-based approach to social innovations and reform' action also addresses social services. The European platform is also responsible for three coordination tools: i) the 'European semester' for monitoring the structural reforms of member states; ii) the 'Scoreboard' for keeping track of the progress towards the poverty targets; iii) the 'Annual convention of the European platform against poverty and social exclusion' as an opportunity for dialogue between policy makers and non-governmental stakeholders.

Table 4. The European Platform against Poverty and Social Exclusion: selected Areas of action and Initiatives/Measures related to social services

Areas of action	Relevant Action	Relevant Initiatives	Status	Measures/Acts
1. Delivering actions to fight poverty and exclusion across the policy spectrum	Social protection and access to essential services	Develop the *Voluntary European Quality Framework on Social Services* at a sectoral level, including long-term care and homelessness.	2011-2013-Ongoing	Quality framework for prevention of abuse and neglect in LTC, developed by the *AGE Platform Europe* in the context of the *WE DO* project, aimed to promote quality long-term care services in Europe.
		Support initiatives for active ageing by a wide range of non-governmental stakeholders in the context of a European *Year for Active Ageing* in 2012.	2011-2012-Completed	
		Launch of a *European Innovation Partnership on Active and Healthy Ageing*. It aims at promoting social innovation for the elderly, more equal and affordable access to modernised and responsive care services (i.e. specific aged related care, home based care) and new medical products and devices.	2011-2013-Ongoing	*Innovation Union* (COM/2012/083 Modalities for joining the Partnership)
2. Making EU Funding deliver on the social inclusion and social cohesion objectives of Europe 2020	Developing an evidence-based approach to social innovations and reforms	Launch of a major initiative to promote social innovation by: • establishing a 'high-level steering committee' • creating a European research excellence network for the design and evaluation of social innovation programmes • launching a European research project aimed at devising workable methods and concrete impact measurements • defining common principles about designing, implementing and evaluating small scale projects to test policy innovations before adopting them more widely (social experiments) • ensuring communication and awareness raising about relevant ongoing social innovation; make use of existing financial instruments.	2011-2012-Ongoing	
		Exploring the best ways and formulate proposals for social innovation in the new financial framework, including through the ESF and possibly new financing facilities	2011-2012 – Completed	*Social Innovation and Social Policy Experimentation* (SISPE) approach, included in the ESF 2014-2020 and in the *Programme for Social Change and Innovation* (PSCI)
		Develop cross-sectoral approaches that articulate actions in several related policy fields	2011-2012-Ongoing	

Source: Authors' own compilation, based on EC, 2010a; EC, 2013a; EC, 2013b.

The *Social investment package* re-pledges the EC commitment to link social expenditure to the economic goals of growth, employment and productivity and it outlines the reforms necessary to secure more adequate and sustainable social policies (EC, 2014a). The key policy recommendations include: 1) a 'simplification' of services in order to improve their efficiency; 2) institutional reforms and, in particular, 'de-institutionalization', i.e. a transition from institutional to community-based care; 3) the 'modernisation' of social policies (such as activation measures or personalized approaches); 4) innovation as an essential element of social investment.

DG-REGIO is responsible for implementing the so-called European *Cohesion policy*, established after the Single European Act of 1986 in order to strengthen the economic, social and territorial cohesion of the EU and reduce regional disparities within and between member states. Its programmes are financed mainly through the *European regional development fund (ERDF)* and the *Cohesion fund (CF)* (EC, 2013e, p. 3), albeit the European social fund (ESF) also contributes significantly and some resources can be pooled from the other two European investment and structural funds – the European agricultural fund for rural development (EAFRD) and the European maritime and fisheries fund (EMFF).

The EU Cohesion policy (see Table 5) is implemented through multi-annual investment programmes, with management procedures shared among the EC, member states, and regional and local authorities. Since its onset in 1989, there have been five programming periods.

Table 5. The EU Cohesion Policy timetable

1957	First mention of regional differences in the Treaty of Rome.
1958	Institution of ESF – European Social Fund.
1975	Institution of ERDF – European Regional Development Fund.
1986	Legal basis for 'Regional Policy' established in The Single European Act.
1988	First reform of Structural Funds: in order to compensate for the consequences of the Single European Market on the weakest regions of the EU and to ease the accession of Greece (1981), Spain and Portugal (1986),the three Structural Funds are integrated into an overarching 'Cohesion Policy'. Budget: ECU 64 Bn.
1993	Maastricht Treaty (1992) introduces – among other things – the Cohesion Fund, the Committee of the Regions and the principle of subsidiarity.
1994-1999	Doubling of the resources for the Funds to equal a third of the EU budget.
1995	Special objective (No. 6 – Arctic regions) added to support the sparsely-populated regions of Finland and Sweden.
2000	'Lisbon Strategy' shifts the EU's priorities towards growth, jobs and innovation.
2000-2006	The priorities for this period are targeted to reflect the Lisbon Strategy's goals. 'Pre-accession' instruments make funding and know-how available to countries in line to join the EU.
2004	Ten new Central and Eastern European countries join the EU, increasing its population by 20%, but its GDP by only 5%. A specific budget is allocated for the new Member States (2004-06).
2007-2013	30% of the Cohesion policy budget is earmarked for environmental infrastructure and measures to combat climate change, and 25% for research and innovation.
2014-2020	The new programming period introduces *simplified common rules* and a *better focus on outcomes and results.* Budget of EUR 351.8 Bn and 11 thematic objectives to help achieve Europe 2020 goals.

Source: Authors' compilation, based on EC, 2014c, p. 7.

The current one covers the years 2014-2020, which coincide with the last seven years of the Europe 2020 strategy. In fact, this new round of EU Cohesion policy introduces a very relevant social dimension: four of its 11 'thematic objectives' are dedicated to the 'inclusive growth' priority (see Figure 1). Moreover, for the first time, a minimum of 23 per cent of the European social fund, is earmarked for the implementation of Cohesion policy.

3 Priorities		SMART				SUSTAINABLE			INCLUSIVE			
11 Thematic Objectives		1 Research and Innovation	2 ICT	3 Competitivness of SMEs	4 Low-carbon economy	5 Combating climate change	6 Environment and resource efficiency	7 Sustainable transport	8 Employment and Mobility	**9 Social Inclusion**	10 Better education, training	11 Better public administration
5 European Structural & Investment Funds												
ERDF	(European Regional and Development Fund)	**X**	**X**	**X**	**X**	x	x	x	x	x	x	x
ESF	(European Social Fund)	x	x	x	x				**X**	**X**	**X**	**X**
CF	(Cohesion Fund)				**X**			**X**				**X**
EAFRD	(European Agricultural Fund for Rural Deveopment)	x	x	x	x	x	x		x	x	x	
EMFF	(European Maritime and Fisheries Fund)			**X**			**X**		**X**			

Figure 1. Priorities, thematic objectives and European structural and investment funds

Source: Authors' own compilation.

Of the four thematic objectives attached to the 'Inclusive growth' priority, the one on *Social inclusion* – has direct relevance for social services. Its 'lines of action' include:

- enhancing access to affordable, sustainable and high-quality services, including health care and 'social services of general interest', also in rural areas (this line can draw upon resources from ESF, ERDF, EAFRD);
- investing in health care and social infrastructure (ERDF);
- promoting the transition from institutional to community-based services (ERDF);
- supporting social enterprises (ESF, ERDF).

This thematic objective also includes five 'areas of action' (see Figure 2), among which the most directly relevant for social services are, again, 'Social inclusion' and 'Transition from institutional to community-based care'. Within the first, the key policy recommendations mirror those of the Social Investment Package: simplification of services, public administration reforms to enhance access to affordable, sustainable and high-quality services, modernising social services, innovation. In the second, initiatives aim at transferring resources, workforce and users (children, older people, people with disabilities) from institutional to community- and family-based care. In this area, strong emphasis is placed on the notion that EU financial support to de-institutionalization must be temporary, as new care systems must become self-sustained.

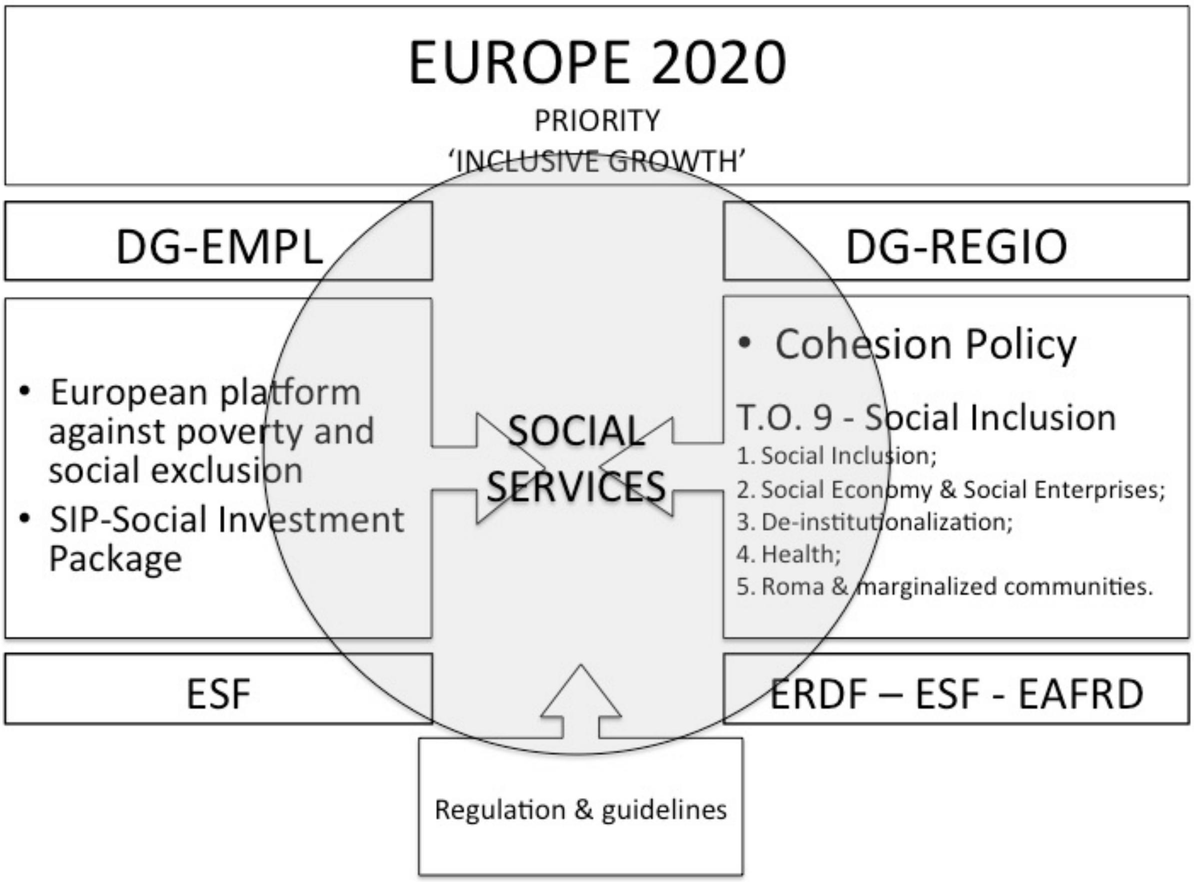

Figure 2. Funds and policy tools addressing social services within the Europe 2020 strategy

Source: Authors' own compilation.

2.3 A complex, redundant and sometimes unfriendly policy framework

The EU social policy agenda has come a long way since the Lisbon Council, in several aspects.

Despite the financial crisis, the social investment field has resisted and inside the EU 2020 strategy, social inclusion and Cohesion policy are strictly integrated.

The autonomy of member states in social policy has been preserved, but now it is more firmly cast in a European framework, with 'soft' governance and coordination tools and some funding, through Cohesion policy. In particular, the OMC is emphasised in many social policy areas.

On the other hand, the current policy framework and tools appears redundant, and often confusing. In fact, to make everything fit in and to integrate everything with everything else, a very complex policy architecture has been devised, based on a multitude of objectives, priorities, flagship initiatives, thematic objectives, guidelines, lines of action, areas of action, platforms, packages, and so on and so forth, that risks discouraging and disorienting, rather than accompanying and supporting the average stakeholder.

Moreover, tensions remain – unsolved – between goals and resources: while the Europe 2020 social goals remain very ambitious, the resources mobilised (essentially the ESF and part of the ERDF) to support the less developed member states and regions are rather limited. In addition, while Cohesion policy provides resources for 'investment' in social infrastructure, the resources needed to 'operate' social services must come from member states, an option not always viable in times of austerity.

3. The regulation of Social services of general interest (SSGI): state aid and public procurement rules

3.1 The emergence and ambiguity of the SSGI concept within Services of general interest (SGI)

The term services of general economic interest (SGEI) was first introduced in Article 86(2) of the 1957 Treaty of Rome[3]. It was an entirely new concept which was not recognised in any language of the original Member States or in scientific literature (Bauby, 2011). However, it was not until the policies of privatization, liberalization and integration into the single market gained momentum, during the nineties, that the concept actually developed (Gómez-Barroso and Marbán-Flores, 2013). At the time it was broadly accepted that those policies needed to be countered by a project to foster social and political integration, and accessible and affordable services of general interest (SGI) were an important part of these efforts (Clifton et al., 2005).

As a consequence, the Commission dedicated a first Communication to the SGI (EC, 1996), where the SGEI were basically defined as a subset of SGI market services, and no reference was made to social services. It was in the *Green paper on SGI* (EC, 2003) where it was recognised that 'the reality of services of general interest which include services of both general economic and non-economic interest […] covers a broad range of different types of activities, from certain activities in the big network industries (energy, postal services, transport, and telecommunications) to health, education and social services' (EC, 2003, p. 5). A year later, the *White paper on SGI* introduced the expression social services of general interest (SSGI), stating that they 'have a specific role to play as an integral part of the European model of society' and announcing a 'systematic approach in order to identify and recognise the specific characteristics of social and health services of general interest and to clarify the framework in which they operate and can be modernised' (EC, 2004, p. 16).

The message was reasserted in the *Social Agenda* (EC, 2005b). Then, it became a 'policy development initiative' for the Community Lisbon programme (EC, 2005a), what took form with a first Communication, of 2006, devoted to SSGI (EC, 2006). The White paper had already stated that 'while there is some interest in further clarification of the situation of organisations providing social services under Community law and in protecting non-economic services of general interest as part of the European social model, there is broad agreement that the Community should not be given *additional powers in the area of non-economic services*' (EC, 2004, p. 24). Along this line, the 2006 Communication was limited to just help to define SSGI (health services are excluded from the list), and to clarify the conditions '*for the application of certain Community rules'* (EC, 2006, p. 6), in particular delegation of social missions to external partners, regulation and access rules where private operators provide a social service, and use of public financial compensation.

The Commission refined its analysis of SSGI in 2007 (EC, 2007a) and then has published three biennial reports in 2008 (EC, 2008b), 2010 (EC, 2010c) and 2013 (EC, 2013f). As the 2013 report acknowledges, the issue that '*has dominated the scene for at least the last decade*' is the application of EU rules on State aid, internal market and public procurement to social services.

[3] Now Article 106(2) of the Treaty on the Functioning of the European Union (OJEU, 2004).

3.2 Regulation of social services of general interest: State aid and public procurement rules

As stated in the previous paragraph, the regulation of SSGI has been confined to the application of EU rules on State aid, internal market and public procurement to social services. Indeed, accompanying the Communication of the Commission of November 2007 on SGI *including SSGI* (EC, 2007a), two 'Frequently Asked Questions' documents (FAQs) on the application of State aid (EC, 2007b) and public procurement rules (EC, 2007c) were published. Three years later, in December 2010, both FAQ documents were updated and put together as a *Guide* (EC, 2010d). Following the adoption of a Communication which sets out in a comprehensive manner the Commission's approach to SGI (EC, 2011) (and in particular the adoption of new State aid rules applying to SGEI) the Commission updated again the Guide in February 2013 (EC, 2013g). It should be underlined the fact that the updating *did follow* a modification of the SGI regulation. In this sense, the 2006 Communication already made it clear that 'under Community law, social services do not constitute a legally distinct category of service within services of general interest'.
The documents provided by the Commission not only clarify the rules of application but also justify why rules are needed and welcomed. In the third biennial report, it can be read that 'in recent years, several public authorities and civil society organisations representing service users and providers have claimed that the EU rules create unnecessary difficulties'. Against these views, the Commission argues that EU rules take into account the specific characteristics of social services and that, 'if the public authorities apply them correctly, these rules can help them organise and finance high-quality cost-effective social services in a transparent manner' (EC, 2013f, p. 4).

State aid rules

The 2011 *Almunia package* consists of four instruments that apply whenever public authorities in the Member States (be they national, regional or local authorities) finance SGEI. They therefore apply to social services when they have an economic nature.
In order to define the applicable framework to social services, it helps to answer a number of subsequent questions:

a) Has the public service an economic nature?
Any activity consisting in offering goods and/or services in a given market is an economic activity within the meaning of the competition rules. The fact that the activity in question is termed 'social' or is carried on by a non-profit operator is not in itself enough to avoid classification as an economic activity.
In spite of this general rule, *certain activities of a purely social nature* have been determined to be non-economic. Specific guidance in respect of social security, health care and education is provided. For instance, as regards social security schemes, a number of features have to be considered: whether membership of the scheme is compulsory or voluntary, whether it has a social purpose, whether the benefits depend on the contributions made or are proportionate to the earnings of the person insured, and whether there is State supervision of the scheme.

b) Is public funding always regarded as State aid?

State funding for the provision of social service of economic nature may not be regarded as State aid, provided that four conditions are met. Those conditions are commonly referred to as 'the Altmark criteria':

- the beneficiary of a State funding mechanism must be formally entrusted with the provision and discharge of an SGEI, the obligations of which must be clearly defined;
- the parameters for calculating the compensation must be established beforehand in an objective and transparent manner;
- the compensation cannot exceed what is necessary to cover all or part of the costs incurred in the discharge of the SGEI, taking into account the relevant receipts and a reasonable profit;
- where the beneficiary is not chosen pursuant to a public procurement procedure, the level of compensation granted must be determined on the basis of an analysis of the costs that a typical 'well-run' undertaking would have incurred.

In relation to these criteria, the Commission introduces several elements of clarification. In particular it is important to know that a public service obligation cannot be imposed for an activity which already is or can be satisfactorily provided by the market 'under conditions, such as price, objective quality characteristics, continuity and access to the service, consistent with the public interest, as defined by the State'.

The SGEI *de minimis* Regulation (EC, 2012d) provides that aid measures not exceeding EUR 500 000 over any period of three fiscal years per undertaking are outside the notion of aid.

c) Is State aid compatible with the internal market?

Public service compensation that constitutes State aid can yet be compatible with the internal market and does not need to be notified to the Commission. Indeed, this is the general rule for social services.

The previous State aid regulation exempted social housing and hospitals from prior notification regardless of the level of financing were. The 2011 Decision (EC, 2012c) in Article 2.1.c extends the scope of this exemption to all services 'meeting social needs as regards health and long term care, childcare, access to and reintegration into the labour market, social housing and the care and social inclusion of vulnerable groups'. This list of exempted social services given in the Decision is exhaustive. However, the last sentence (*care and social inclusion of vulnerable groups*) gives flexibility to include different types of services addressed to those groups of society 'that need them the most, in accordance with the variety of needs and preferences of users that may result from different geographical, social or cultural situations among the member states'.

Compatibility does not mean, of course, absolute freedom. While the public authorities do not have to notify their financing of social services, they must nevertheless establish a clear and precise act of entrustment and ensure that the service provider does not receive any overcompensation.

The duration of the entrustment period (the period during which the service is entrusted to a given provider) is limited to a maximum of ten years, unless the provision of the service requires significant investment which needs to be amortised over a longer period. This may be the case for instance in the social housing sector.

The amount of compensation must not exceed the net costs, including a reasonable profit. Above this limit, the provider receives an 'overcompensation' which cannot be justified by the need to provide the social service. The Decision proposes two methodologies to calculate the net cost: i) as the difference between the costs incurred in providing the service and the revenue earned from it or ii) as the

difference between the net cost for the providers of operating with the public service obligation and the net cost or profit of the same provider operating without the public service obligation. To calculate the reasonable profit, the reference is the rate of return on capital that would be required by a provider considering whether or not to provide the service, taking into account the degree of risk.
As a last remark, public service compensations that would normally be covered by the Decision but which failed to fulfil all the conditions of the Decision, lay therefore under general State aid regulation. In this situation, there is also an exemption from notification when compensation does not exceed EUR 15 million on an annual basis.

3.3 Public procurement rules

'All too often, public authorities assume that by complying with State aid rules they have ensured the legality of their financing arrangements' (EC, 2012a, p.18). However, when organising and financing social services, public authorities must not only identify the amount of the financing, but also address another type of questions: Who will provide the service: the public authority itself or an external provider? If an external provider, how will it be selected? It is in this context that public procurement rules may come into play.
Social services are barely affected by the rules laid down in the Directive in force (European Parliament and Council, 2014, p. 7) considering that 'given the importance of the cultural context and the sensitivity of these services, Member States should be given wide discretion to organise the choice of the service providers in the way they consider most appropriate'. Nevertheless, public authorities have always to comply with the Treaty principles of transparency, equal treatment and non-discrimination, mutual recognition and proportionality. This means, in particular, that the authority must: i) adequately advertise its intention to outsource the provision of the social service and to conclude a public service contract with an external provider; and ii) deal in a non-discriminatory and impartial way with all the providers that have shown an interest in such a contract.
The EU public procurement rules apply only when a public authority has decided to outsource the provision of a service to an external provider that the public authority pays for providing the service. Therefore, they do not apply when the public authority grant licences or authorisations to all service providers that meet the conditions for service provision it lays down beforehand.

4. Discourses and ideologies underlying the current EU social policy strategies

This section reviews current EU strategies in the field of social services, with a particular focus on *Europe 2020* and the *social investment package*, which are assessed against the backdrop of the strategies emanating from the *Lisbon process* of the 2000s. In this review, we seek to identify changes in discourses and underlying ideologies.

EU discourses on social policy should be taken to reflect the 'changing interests of changing coalitions of actors in the general intergovernmental bargaining process . . . [of which the] product represents a *discursive* settlement of conflict' (Barbier, 2011, p. 12; emphasis in original). It follows that a first step in determining political drivers of EU strategies is to look at the political-ideological orientation of the actors involved. Clearly, the most important actors in this respect are the governments of Member States. Here, quite an important change has occurred; a European Union that in 2000 was dominated by left-leaning governments has been replaced by one where right-wing governments are in the overwhelming majority (The Economist, 2011). This change, which is a result of both the entrance of new Member States with a more conservative or neo-liberal orientation and political shifts in the old ones, was clearly reflected in the post-Lisbon casting of strategies for social services.

Furthermore, in reviewing current EU strategies for social services, one should consider the critical intergovernmental bargaining arenas that have emerged in this field. As discussed in the previous sections, the Lisbon Summit established important new bargaining arenas. In particular, the inauguration of the OMC instrument in the field of social protection and the process of cross-European social benchmarking/target setting are important.

Arguably, the Lisbon process marked a policy shift in the EU position on social services (Daly, 2006). Such services were now assigned a central role in easing the societal transformation that European countries faced. As argued by Hantrais (2004, p. 193):

> At the heart of the 2000 social policy agenda was the modernisation of the European social model, which had the overall aim of strengthening the role of social protection as an effective tool for the management of change [. . .] Modernisation and improvement of social protection were central components in the response to the advent of the knowledge economy and to changing social and family structures.

While social services had previously been regarded merely as policies to alleviate the negative externalities of the market, the Lisbon strategy strongly articulated the positive externalities of social services. This new orientation manifested itself in the setting of targets related to alleviating critical social problems, and to the volume of specific social services to be provided by member countries. For example, the policy documents produced in the wake of the 2002 Barcelona Summit (extending the targets established at the Lisbon Summit from six to 20) linked the provision of childcare services to the achievement of a number of societal goals. These goals included mobilizing (female) labour, fighting premature school drop-out, countering the intergenerational transmission of social inequalities, promoting gender equality and strengthening European fertility (EC, 2013a, pp. 4-6).

Yet arguably the strongest commitment to social services springing from the Lisbon strategy was less direct. Hence, by setting ambitious targets for employment rates, with the intention 'to realise Europe's full employment potential' (EC, 2000, p. 15), the European Union took an important step towards endorsing a social model in which social services played an integral part. Prominent social scientists were commissioned to explain the underlying rationale. They argued that to create good quality jobs and a suitable productive labour force to fill them, it was necessary to regard welfare state expenditure on social and educational services as investments (Esping-Andersen et al., 2002). Furthermore, by placing employment promotion high on the agenda, one embraced a welfare model close to the Beveridge ideal, in contrast to a North American-style neo-liberal model (*cf.* Korpi and Palme, 2003).

Speaking simultaneously to economic and social concerns, the social investment perspective epitomizes the 'discursive settlement of conflict' between neo-liberal and social democratic ideals inherent in the Lisbon strategy that evolved throughout the 2000s. This decade saw a series of parallel concepts such as 'flexicurity', 'social entrepreneurship' and 'social innovation' that shared this dual ideological orientation. Hence, this new vocabulary, and the sets of actions that such ideas prompted, took the century-old 'European way' of handling conflict and diversity through the process of institutionalization (*cf.* Offe, 2003, p. 440) to a new level.

In the transition from the Lisbon strategy to the Europe 2020 and Social investment package strategies, while the conceptual framework has remained the same, it is now more specific in what concerns the methodology to achieve the objectives (Budd, 2013, p. 287). The Package aims at 'redirecting member states' policies, where needed' (EC, 2013b, pp. 3-4), by linking the Europe 2020 targets with the relevant EU funds. As mentioned earlier, in the 2014-2020 period, the Commission proposes to set aside at least 23 per cent of the European Social Fund for activities that align with the social investment perspective, while the European Regional Development Fund should complement such social investment by funding social service infrastructure. In this way, by strengthening the dimension of 'aid conditionality' (van Gerven et al., 2014), a change in the mode of governance is observed; the 'soft' law mechanisms of recommendations and policy learning are significantly hardened.

The Platform against Poverty, in particular, emphasizes social services, and is meant to provide new impetus related to the work of promoting better services. The Commission argues that among poverty's multiple dimensions there is 'inadequate access to basic services' (EC, 2010b, p. 6). It calls for greater efficiency through service consolidation and better delivery, together with the mobilization of a greater set of actors and instruments. A number of social services are emphasized as essential in alleviating poverty: childcare (the Commission mentions both 'quality childcare' and later 'affordable childcare'), educational services, employment services, health services and elderly care services, and even publicly provided basic financial services (EC, 2010b, pp. 4-5, 11). Partly overlapping with the mentioned services, a number of critical policy areas are highlighted, including education, social care, housing, health, reconciliation and family policies (EC, 2010b, p. 5). Because people living in rural areas in Europe are disproportionally affected by poverty, the Commission also calls for specific action in these areas, and relates such action to the promotion of social services and upscaling of social service infrastructure (EC, 2010b, p. 13-14). In this manner the Commission recognises, the critical role of social services in achieving *territorial* cohesion, a perspective that social scientist have already pointed out (Kolberg and Esping Andersen, 1991).

The social investment package strategy of 2013 outlines the reforms needed to secure more adequate and sustainable social policies by investing in people's skills and capabilities, by improving performance and devising more efficient and effective inclusion strategies and social budgets. The package aims at 'redirecting Member States' policies, where needed' (EC, 2013b, p. 3-4). To bring about this redirection it links the Europe 2020 targets to the relevant EU funds.

In the document, the Commission argues that, as welfare systems face demographic change and financial crises, they need to modernize social policies and the way in which they are financed. This implies new approaches to social policies and new strategies in the provision of welfare. Importantly, the Commission argues that providing welfare through services, rather than cash transfers, may be more conducive to the investment perspective (EC, 2013b, p. 10). This may be interpreted as an appreciation of the social democratic service-intensive welfare model.

Yet the Commission's recommendations in other respects align more with the liberal model. This alignment concerns the debate on 'targeting' versus 'universalism', which goes to the heart of the political economy of the welfare state. While acknowledging that 'both universalism and selectivity need to be used in an intelligent way' (EC, 2013b, p. 9), the Commission takes quite a strong stance in encouraging Member States to target the provision of cash benefits and social services better to increase efficiency and effectiveness (EC, 2013b, pp. 3, 5, 9). In favouring selectivity, the Commission arguably approximates the liberal-type model for allocating welfare (*cf.* Esping-Andersen, 1990).

By discussing non-public sources of welfare, the Commission again touches upon ideological questions fundamental to the welfare state. Here, it recommends encouraging private enterprises to provide more social services to their employees, and for governments to depend more on third-sector involvement in welfare production and delivery (EC, 2013b, pp. 5-6). This recommendation also better matches a liberal agenda than a traditional social democratic one. The Commission calls for more support for private businesses, which as a central part of their operations promote social inclusion (so-called social entrepreneurship). Furthermore, it encourages Member States to make use of a type of finance arrangement where private investors are allowed to finance social programmes in return for the opportunity to receive economic rewards, should the programme be successful in achieving its goals (so-called social impact bonds) (EC, 2013b, pp. 18-19).

The document points to activation measures (that is, measures that entail some kind of formalized activity in which the benefit claimant participates) as a prime tool for transforming social expenditures into investments. Furthermore, it emphasizes temporary rather than permanent benefits and conditionality (EC, 2013b, pp. 3, 8-9). From the outset, activation, as a supply-side measure in the active labour market policy toolbox, resonates well with social democratic ideology. Yet the implied extension of activation as a measure to address not only the unemployed but all benefit and service claimants, and the emphasis on conditionality, brings the Commission's recommendations closer to neo-liberal positions, as do the Commission's call for more 'incentives to work' (EC, 2013b, p. 5) and its initiatives to 'make work pay' (EC, 2013b, pp. 10, 12).

Likely reflecting a 'discursive settlement of conflict' – that is, a necessary compromise meant to accommodate the different welfare models coexisting in Europe – some underlying dilemmas remain in the new strategy documents. This is observed in the call for more conditionality (EC, 2013b, pp. 3, 8-9) and monitoring (EC, 2013b, p. 5) on the one hand, and a call for simplified procedures (EC, 2013b, pp. 3, 9) on the other. Indeed, imposing monitoring and conditionality necessitates a large legal and administrative apparatus that renders procedures quite complicated, to the extent that clients find themselves sanctioned for violating conditions of whom they were not aware (Kvist and Harsløf 2014). Likewise, the call for more individualised social services may be challenging to realise if it is to be implemented under a regime of more top-down control. Perhaps, as Peña-Casas (2011, p. 162) observes, emphasising individualisation, more than anything ushers in a new and more individualised approach to social problems: social services shall be provided with the purpose of ensuring that individuals can anticipate and manage change.

5. Concluding remarks

The construction of a European Union is proving to be a long and extremely complex journey. One of the many milestones along the way was reached with the turn of the century, when it seemed that the conditions for a leap forward were in place. The Union seemed to be able to move forward both external and internally: externally, shifting its borders to the East; internally, building *more Europe*. The initiative to foster a – until then virtually absent – *social Europe* was at the heart of this effort to develop a broader Europe.

On the opening speech to the Lisbon European Council, on 23 March 2000, Nicole Fontaine, the then President of the European Parliament, declared:

> The European Community began as an economic one […] Europeans are now looking to this European Council meeting to give shape to a social Europe […] They are scandalised by untrammelled capitalism whose relocations, social dumping, ruthless exploitation of the disparities between the social and fiscal legislation of the Member States and remorseless pursuit of profit at the expense of working men and women have a direct and traumatic impact on their lives, both as communities and as individuals. For these reasons their expectations of this Council meeting are extremely high. You must not let them down (European Parliament, 2000).

The impetus, however, soon lost moment. It may be that there was not a clear idea of how to orchestrate the implementation of the strategy. Or it may have happened that words did not represent real intentions. Be that as it may, the expectations were, indeed, in spite of Mrs Fontaine's plea, let down. Only after four years, in the mid-term review of Lisbon strategy, it was already clearly intended, as has been seen in this chapter, that the European project would keep travelling by – basically – economic rails.

Making things worse for the progress of a social Europe, the crisis came across the way. The term crisis is a reduction of the causes that operated around, and the consequences that emerged from the economic crash that started in 2007. The aftermath of the crisis had and is having a clear impact on the social well-being of millions of European citizens. The answer from the European institutions has far more to do with macroeconomic orthodoxy than with taking care of individual circumstances.

That does not mean that the notion of a European social policy has been abandoned. It has somewhat remained and has even been perfected. The Europe 2020 strategy maintains the social policy as a priority and has integrated it with its growth and competitiveness goals, within cohesion policy. Moreover, it has earmarked a relevant part of the structural and investment funds to pursue social policy goals.

The European social policy model in its actual shape has, however, two important problems. The first – and main one – is about credibility and trust. The last fifteen years have been a period of big words and small achievements. There is no reason to believe that the political momentum is now firmer. On the contrary, reality may be closer to what Mario Monti, who served as a European Commissioner from 1995 to 2004, disclosed in his report addressed to the president of the Commission in 2010. Explicitly referring to social services, he argued: 'Since the nineties, the place of public services within the single market has been a persistent irritant in the European public debate' (Monti, 2010, p. 73). The second problem is about organisation and planning. The social policy framework and tools are extremely redundant, overlapping and confusing. To make everything fit and to integrate everything with everything else, a very complex policy architecture has been devised, that discourages and disorients, rather than accompany and support. As well-documented in this chapter, there is an ever growing number of objectives, priorities, flagship initiatives, lines of action, areas of action, and Communications on this and that. This enormous complexity makes the policy framework impenetrable in terms of understanding and access, let alone implementation to the average stakeholder, whether public or private. Moreover, a tension remains between goals and resources. While cohesion policy provides resources for social infrastructure 'investments', the resources needed to operate social services and inclusive measures must come from member states, thereby requiring a firm commitment from the latter to support an expansive – albeit reformed – system of social services. Unfortunately, this does not seem to be happening.

In adopting such a position on social affairs, the European Union may be jeopardising its own development. *Making more Europe* needs a genuine debate on a number of social issues that will seriously condition the direction taken by the Union. The list of challenges that require a thoughtful answer, not targeted towards addressing specific current problems, is long:

- There is no clear prospect that the economic turmoil would be overcome in the short term. Even if this is the case, harms caused to social protection in many member states are profound and the situation would not spontaneously revert. Financial constraints on public budgets are expected to last for years.
- Unemployment rates are high, particularly among deprived communities, and vulnerable groups such as women, young people and the low-skilled. For instance, the EU youth unemployment rate is above 20 per cent since late 2008, being more than double than unemployment rates for all ages. The job loss also often comes with loss of social benefits. Even in those countries that show a rising employment rate, labour markets are driven by the expansion of low-wage sectors, with a trend towards part-time or temporary and low-rights work.
- EU population pyramids offer a vivid representation of an aging European population; baby boomers expected to swell the number of elderly while the working-age population is expected to narrow considerably.
- The structure of family is rapidly changing across Europe. Leaving aside the improved female participation in the labour force, broken and single homes are becoming increasingly prevalent. Geographical mobility, i.e., the willingness to move anywhere for a job, is rapidly increasing, particularly in countries of the South and East of Europe, what also impacts on the family structure.
- In spite of its sluggish economy, the European Union keeps being regarded as a paradise for those who come from very hard lives. Integration of large waves of migrants and asylum seekers asks for social support – and investments.
- Globalisation, climate change, technological innovation and changing lifestyle values affect society as a whole – and social issues in particular – for the worse but also for the better. As a remarkable example, there appears to be a lack of a framework for capitalising the use of information and communication technologies in furtherance of social services – the development of *European social e-services*.

How to meet these challenges is absolutely a European matter. Of course, it would be publicly acknowledged that it is, indeed. The danger is that while the official discourse keeps rhetorically emphasising the values and the role of social services and the contribution of a *social Europe*, big words keep being not linked to an adequate consideration on how this could be achieved.

It is clear, on the other hand, that diversity exist within and across so many of the areas of European social services that it would appear difficult to apply common rules. But the distance between strict common rules and just some general rules on procedural matters would accommodate an ample set of actions such as the establishment of minimum thresholds or basic social coverage policies, a real – and clear – disposal of funds, or just addressing the uncertainties which the actors in the social services feel.

If, on the contrary, the soft regulatory approach still succeeds and most of the effort is going to be left to member states, a several-speed social Europe would become a permanent arrangement.
Analyses of strategies and discourses in this chapter suggest that a liberal ideology is permeating post-Lisbon social policy directions – even if also some elements of the social democratic model are taken on board. At the very end, the triumph of prioritising the economic-financial Europe over the social-political Europe means that social inequalities continue to exist and would for sure grow. It is not necessary to clarify what inequalities produce in societies in the long term. And, of course, an unequal Europe is not what so many supporters of a join European project have fought for during the last sixty years.

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This paper aims at assessing the EU's emergent policy framework concerning social services within the larger field of social protection and social inclusion. At the turn of the millennium, it seemed that the conditions for a leap forward towards a more social union were in place, but it soon became clear that the EU is still travelling essentially on economic rails. Indeed, social services are integral to the current strategy, as represented by the Social investment package and the Platform against poverty. Yet, beyond the very ambitious and redundant multitudes of discourses, objectives, priorities, flagship initiatives and so on, an ambivalent stance and a number of structural tensions permeate the EU social policy framework and especially the initiatives more specifically geared to social services. The very ambitious goals are not supported by actual financial means; a tension remains between the attempt to set up a European regulatory framework and national sovereignty in the social domain. Moreover, there seems to be a contradiction between competition policy applied to services and the right to welfare involved in social services. These unsolved tensions are likely the result of compromises in a geopolitical region accommodating different welfare state models, entailing different approaches, goals, and interests.

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