

# Political Issues and Social Policy in the E.U.

*Professor John Wilton*

## Lecture 3

**Harmonisation, mutual  
recognition, and the  
'europeanisation' of social  
policy?**

# Political Issues and Social Policy in the E.U.

## Lecture 3

- what are the defining characteristics and over-arching principles categorising E.U. social policy?

### *CONTEXT*

- historical and theoretical frame

+

- over-arching principles

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- there is a parallel process of E.U. social integration accompanying developments in political and economic integration (spillover)
- What is the 'politics' of E.U. social integration?
- E.U. 'single social areas'?
- A 'europeanisation' of social policy?

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1. Harmonisation and convergence
2. Diversity and mutual recognition

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- Article 117, Treaty of Rome (1957),  
introduced principle of harmonisation of  
social systems, implying ultimate  
convergence from function of 'common  
market'
  - but very little actual progress

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- was believed shared tradition of social protection systems, plus variations of continental (West European) model of welfare in 6 founder member states, would assist harmonisation
- BUT, differing types of social protection, differing focus on principles, differing policy making processes, did not assist

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*PLUS*, each new wave of member states brought own different social policy and welfare models – making harmonisation more difficult

*ALSO*, some states (i.e. Greece, Portugal, Spain) had more limited social policy and welfare systems – traditions of community, family and religious support

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- Harmonisation made more urgent, but also more complex, by preparations for EMU – and aim and need to maintain principle of freedom of movement in enlarged E.U.



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BUT, by Maastricht Treaty (1993) Social Charter stated account should be taken of “diverse forms of national practices, in particular in the field of contractual relations”

- stressed the need to maintain the competitiveness of the Community's economy

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Harmonisation of social policy not defined as, or suggested to mean, complete unification of social systems and social policy

- But acceptance of certain common principles and standards of social policy

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- harmonisation seen as means of avoiding 'welfare tourism'
  - and prevent national social policy becoming bargaining counter between member states
  - and avoid distortion of economic 'competition'

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Single European Act (1985) –  
convergence in fiscal and  
employment law

- improvement in infrastructures and standards of education and training
- for competitive Single European Market harmonisation of social policy necessary

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- *BUT* Jacques Delors, as Head of the E.U. Commission, accepted various specific cultures, traditions and social policy models of member states meant harmonisation across all social policy areas impossible.
- *advocated COHERENCE/COHESION,*
- *Acceptance of diversity and 'MUTUAL RECOGNITION'*

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COHESION = Member states 'encouraged'  
to co-operate and co-ordinate their efforts in  
order to bring about greater economic and  
social cohesion between the regions

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‘Community Charter of the Fundamental  
Social Rights of Workers’, 1989

- harmonisation in context of freedom of  
movement – object of harmonising  
conditions of residence in all member states
- harmonise duration of paid leave from  
work
- harmonise safety conditions at workplace

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‘Community Charter of the Fundamental  
Social Rights of Workers’, 1989

- allowed member states to continue with national differences in social protection systems
- Social Charter (Maastricht Treaty 1993) –
  - no mention of harmonisation
  - respect for national specificity



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-Role of E.U. Commission limited to encouraging co-operation between member states and facilitating co-ordination of their actions in social policy fields

- '*de facto*' convergence occurring as a result of common trends across member states leading to common problems

- convergence promoted by establishing common objectives

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- 2004 enlargement brought different issues and problems
- legacy of bureaucratic state collectivist systems
  - different institutional legacies
  - nature and character of revolutions
  - 1990s economic transformations
  - made harmonisation less likely

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### SUMMARY:

1. Each enlargement made harmonisation less likely
2. 'Deepening' versus 'widening' – contradiction between economic and monetary union necessitating social policy convergence and expansion of E.U. complicating convergence

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### SUMMARY:

3. Differences in social policy in each member state attributed to stage of social and economic development of each country – plus specific forms of national social policy resulting from social, economic, political and cultural traditions

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### SUMMARY:

- NEVERTHELESS - can identify some over-arching principles of E.U. social policy
- based on 'core values' of social progress (i.e. high levels of employment, social protection, raising living standards and quality of life, promoting social cohesion and social justice)

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### SUMMARY:

*‘Europeanisation’* of social policy?

- framework, of principles of social protection, social welfare, social justice, equality of opportunity
- A balance between convergence, diversity, mutual recognition

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### SUMMARY:

*‘Europeanisation’* of social policy?

- A multi-level, varied approach model of E.U. social policy integration
- In different social policy areas and at different social policy levels, different integrated approaches and degrees of integration employed