IDEAS AND POLICY: THE EUROPEAN UNION CONSIDERS SOCIAL POLICY FUTURES

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Abstract:

The European Union's social policy perspectives have changed quite dramatically over the last several decades. Now EU's social policy discourse often promises to "invest in people," sometimes "to invest in children," and always to pay particular attention to youth. This paper argues that the tools of historical institutionalism can lead to understanding the ideational roots of this social investment perspective so distant from the "European social model." Coming out of social movements, and with collective identities shaped both by those movement roots and national experiences, activists have effectively focused their practices on altering the social representations of European social solidarity through their interest group interventions, their participation in policy forums, and their mobilization within civil society at the European and sub-European levels. They have been able to make common cause with several epistemic communities that themselves revamped their ideas in the face of new institutional constraints, in order to advance their interests in promoting particular directions for social policy. The paper documents that "ideas" are not a variable and discourse "sometimes important" but that the ideas carried by movements and in epistemic communities are integral to the very definition of their interests that they promote within and with institutions.

The European Union's social policy perspectives have changed quite dramatically over the last several decades. The heyday of the "European social model," with its social democratic overtones and underpinnings, seems over. European social policy communities claim that social exclusion is the enemy and social cohesion the goal.   Some analysts argue that reshaping the Lisbon Strategy for 2020 will involve, among things, rethinking the social dimension so that greater emphasis goes to education, youth, demography and migration.[1]   The first three of these four targets are elements of a social investment perspective, an approach to policy that can be summarized as involving "investing now for a future payoff."   In recent years the EU's social policy discourse often promises to "invest in people," sometimes "to invest in children," and always to pay particular attention to youth. Where do such ideas come from?

This paper argues that the tools of historical institutionalism can lead to understanding the roots of these shifts in policy discourse so far distant from the "social model" of the 1980s. It is an approach that analyzes change through time with particular attention to the ideas of actors who seek to promote their interests through institutions. Meaning systems are key to understanding both structures and agency because, to quote the expert on the matter, "Men make their own history, but they do not make it as they please; they do not make it under self-selected circumstances, but under circumstances existing already, given and transmitted from the past."[2]

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[1] See *EurActiv*, "Growth and jobs: Reshaping the EU's 'Lisbon Strategy'." 29 June 2009, p. 5 of 8. Of course many assessments of the EU 2020 strategy as it was actually put forward in March 2010 are critical of its lack of social content. For some, the EU's strategy for 2020 is solidly a-social. Others see a social agenda, but one that is much more limited than before, focused only on poverty relief (Peña-Casa, 2010).

[2] This quote from Marx's *Eighteenth Brumaire* is offered in one of the foundational texts of historical institutionalism explicitly as an analytic bridge between structuralist and agency-centered accounts (Thelen and Steinmo, 1992: 10; 35).

Historical institutionalism has been one of the approaches to public policy that has long recognized the importance of analyzing discourse and meaning systems. Unfortunately, over the last years there has been an impoverishment in the conceptualization of meaning-making within research on public policy, particularly but not exclusively with respect to the European Union. One way this impoverishment has happened is by simply rejecting the explanatory power of "ideas" all together, in order to emphasize the mechanisms of path dependency. Second has been the promulgation of the notion that "ideas" are nothing more than a variable, and the justification for attributing weight to the influence of ideas is simply empirical. This second track has even generated the peculiar suggestion within Eurostudies that there is a need for a fourth form of institutionalism, termed "discursive institutionalism."

With these readings of historical institutionalism as "a-ideational" or claims that ideas are only "sometimes" important, there has been a loss. This is a loss of the understanding that there is representational content to *any* action of policy-makers and citizens. Therefore, this paper returns to an "elderly" conception of historical institutionalism, which begins from the following premise (Jenson, 1989: 237-38): "Politics in capitalist democracy involves representation, which is in part the social construction of collective identities. Actors bearing collective identities attempt to carve out a constituency for themselves. Out of this process comes the mobilization of interests, which are also social constructions. … Resolution of basic questions about who the main protagonists are to be, in turn, places broad limits on the definition of interests."

In doing so, I argue that because ideas do not exist separately from the interests and institutions to which they give meaning and the actions they underpin, it is useful to think of them as social representations rather than "variables."

The paper is concerned with the development of policy perspectives by the EU, therefore, rather than with the implementation or take-up of the policy perspective in Member States. It describes the various actors who helped promote the social investment perspective as the way to "do" social policy at the European level in the years after 2005. As a perspective quite different from earlier ones emphasising improvements in wages and working conditions, this reorientation in social policy, I will argue, is the result of more than a rightward swing in the European Commission, although it is that. It is the result of almost two decades of on-going mobilization by activists and experts within the European universe of political discourse. Coming out of social movements, and with collective identities shaped both by those movement roots and national experiences, activists have effectively focused their practices on altering the social representations of European social solidarity through their interest group interventions, their participation in policy forums, and their mobilization within civil society at the European and sub-European levels. They have been able to make common cause with several epistemic communities that themselves revamped their ideas in the face of new institutional constraints, in order to advance their interests in promoting particular directions for social policy.

Studying institutions

Studies of the European Union have come under the influence of the new institutionalism.[3] In the new institutionalism there have long been analyzes claiming that "ideas matter," as well as various approaches to discourse and ideas (Campbell, 1998 provides one review). Organizational institutionalism and historical institutionalism have assessed the power of ideas to facilitate as well as constrain action in policy-making. Others have looked to the diffusion of ideas and

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[3] For a recent discussion of institutionalism within Eurostudies see Jenson and Mérand (2010).

norms.[4]   In addition and particularly as attention has shifted from measuring integration or assessing intergovernmentalism, works applying the tools of public policy to the study of the European Union have increased in number.[5]   In the process, public-policy analysts have bumped into historical institutionalism, but as they did so some have moved away from standard historical institutionalism.   A return to its story, offered in the next section, reveals the superfluity of any "fourth form of institutionalism," that Vivien Schmidt has taken to claiming is needed (Schmidt, 2008).

Historical institutionalism – its two branches

Historical institutionalism's particular emphasis is "on how institutions emerge from and are embedded in concrete temporal processes" (Thelen, 1999: 371).   Within this consensus, two particular concerns were identified in the foundational 1992 collection *Structuring Politics: Historical Institutionalism in Comparative Perspective*.   One was the focus on change (or, often, mechanisms that hinder change).[6]   The other was processes of ideational innovation and change within institutional settings (Thelen and Steinmo, 1992: 13-14).[7]

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[4] On the first two groups see Campbell (1998) and for a review of institutional (among other) approaches to policy diffusion, see Dobbin, Simmons and Garrett (2007).

[5] This influence is much broader than the strand of new institutionalism concerned with ideas. Numerous scholars seek to answer the classic concerns of institutional analysis: how institutions shape social and political life; where institutions come from; how institutions change. For example, we have analyses of Europeanization that ask "does Europe matter" and seek to sort out European effects on national institutions and actions. There are also neo-institutionalists who focus on policy development at the level of the Union itself (for a recent overview see Palier and Surel *et al*., 2007).

[6] The literature on path dependence and mechanisms of reinforcement are the legacy to this branch. See Thelen (1999) for an early overview.

[7] In her well-informed overview, Kathleen Thelen describes a number of classic texts of historical institutionalism (Esping-Andersen's *Three Worlds*, Theda Skocpol's *Protecting Workers and Mothers*, for example) that address the ideational: "rather than taking the interests of political actors as given, all these authors step back to ask how groups originally got constituted in the particular ways they did, then to consider how this affects the groups' understanding and pursuit of their interests" including their potential for identity construction, successful claims-making and coalition-building (Thelen, 1999: 395). Quoting her own work with Richard Locke, she writes about the importance of ideas in feedback mechanisms: "Both the Danish and the Swedish models of the 1960s and 1970s were characterized by a high degree of egalitarianism, which rested on (and also reproduced) a particular coalition of interests and a set of ideational claims supporting egalitarianism" (Thelen, 1999: 398).

The legacy of this second strand is that it has been understood for almost a decade and a half:

> … there is potential in historical institutionalism for the character of the discursive processes through which individuals interact to affect the outcomes that ensue. This follows, in large measure, from their vision of the preferences of the individual as multifaceted or ambiguous and thus something that can be conditioned by active processes of discussion or contestation. Whether an individual will support further European integration or not, for instance, may not be given entirely by his or her position in the economic system but might depend on how the issues comes to be defined in a particular political system and how it connects with other issues about which he/she cares. The potential here is for an approach that accords more importance to the *process* of politics…. (Hall and Taylor, 1998: 962).

One of the foundational texts of historical institutionalism is Peter Hall's (1993) exploration of social learning. It identifies the conditions for paradigm change, involving new ideas about the very objectives of politics as well as the instruments deployed. In doing so, he dialogues extensively with Hugh Heclo, who explicitly referring to the triptych of ideas, interests and institutions, wrote almost two decades ago:

> The historical situatedness of ideas reinforces an awareness of the codependency among ideas, institutions, and interests …. In trying to account for change and continuity, these are categories that need each other, and it is largely arbitrary at which point we cut into the chain. … The intellectual task we have broached in this volume is not how to cut the knot or pick out the single golden analytic strand: It is how to follow the strands of ideas, interests, and institutions as they intertwine and enfold in dynamic processes (Heclo, 1993: 380-81).

This second strand of classic historical institutionalism is the one that interests me here, because in the area of Eurostudies there has been a deformation of this sensitivity to the importance of meaning-making within research on European public policy by those who claim to work within the institutional tradition.

Institutionalisms in the analysis of European public policy

Without pretending to provide a full overview of the literature that uses institutionalism for the analysis of European public policy, we can identify three main positions with respect to ideas.

One position denies the importance of ideas at all. Formal institutionalism, for example, deploys an analytic perspective that focuses almost exclusively on rules within formal organizations, analyzing them in isolation from society. In this view, institutional configurations become the primary causal factors.[8] Others, coming from one branching of historical institutionalism, focus on path dependence and other narrowly interest-driven mechanisms (for example, Pierson, 1998). Such concepts have been deployed, *inter alia*, to redefine the classic Haasian concept of spillover, which predicts that European integration is a self-reinforcing dynamic akin to state formation (for example Sandholtz and Stone Sweet, 1998). Here the analytic focus is on institutions as systems of rules and on institutionalization as the process by which they are created, implemented and interpreted.

Interesting as such analyses are they will not be considered further because my goal is not to arbitrate between those who use "ideas" and those who do not. Therefore, this paper does *not* address one branching of the historical institutional tradition, which has generated both arguments about path dependency in order to account for institutional continuity and later efforts to identify the social mechanisms of institutional change (for an overview of this branch see Streeck and Thelen, 2005).

Rather, the paper seeks to clarify how institutionalists think about cognitive approaches, when they choose to deploy them to study EU public policy. Two other positions in EU policy studies do so. One of these two locates ideas, alongside institutions and interests, in processes occurring through time (see Palier and Surel *et al*., 2007 for example). Such analyses respect the

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[8] Examples here are Marks and Hooghe (2001) or Hafner-Burton and Pollack (2008). For a longer discussion, including of rational-choice institutionalism, organizational institutionalism and constructivism see Jenson and Mérand (2010: 76-79).

ontological premises of time-sensitivity that underpins historical institutionalism. However, there is a tendency towards assessing the weight of institutions, interest and ideas separately.[9] Therefore, time is sliced into moments when "… one of the "three Is" pushes the process at the expense of the other two factors" ("*l'un des « trois I » tend à impulser le mouvement au détriment des deux autres dimensions retenues*") (Palier and Surel, 2005: 27).

Focused on establishing a hierarchy of variables (Palier and Surel, 2005: 19), this approach proposes to measure the weight of each. Doing so, it begins to mimic the standard regression model for assessing explanatory power.[10] As such it moves significantly away from the original approach summarized by Heclo when he asserted the "codependency among ideas, institutions, and interests," thereby making them "categories that need each other."

A third stance in European policy studies, also claiming to be an institutionalist one, suffers from being both a-temporal and variable-centred. This approach makes the claim that in order to appreciate the role of ideas within the European Union's policy process we need to identify a fourth form of institutionalism, termed "discursive institutionalism."[11] Its proponents are dissatisfied with "… the three institutionalisms, whether rational choice, historical or sociological

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[9] Somewhere along the way there has been a reification of the terms of historical institutionalism into "three I's." Whereas in the beginning ideas were introduced in order to correct overly materialist accounts of institutions (see for example Hall, 1993), the triptych has now become three variables within public policy analysis (Palier and Surel *et al.*, 2007: 40). In an additional slippage, each of the three is interpreted as the preferred "variable" of one of the three institutionalisms identified by Hall and Taylor in their 1996 mapping (Palier and Surel, 2005). This latter is simply an error of understanding.

[10] Hall (2003) covers the reason why historical institutionalism, with its ontological stance with respect to time, can not adopt a methodological position modelled on (although rarely actually using) the standard regression model. For another classic statement about the mismatch between "a 'snapshot' view of political life," variable-based analysis and historical institutionalism see Pierson (2000: 72 and passim).

[11] There is another version of "discursive institutionalism" coming out of the Scandinavian academic traditions in sociology, based on hermeneutic approaches and included in overviews of institutionalism for more than a decade (for example Campbell and Pedersen, 2001). Other examples come from post-Marxist traditions. See Hay's contribution in the same volume, which has a post-Jessopian provenance and Hay and Rosamond (2002) who apply their approach to the EU.

institutionalism, finding that accounts primarily in terms of interests, institutions or culture fail to explain the dynamics of change" and therefore they will "seek to go beyond" them to understand the context of Europeanization as well as globalization (Schmidt, 2002: 8). For Schmidt and Radaelli (2005: 184) this institutionalism is "on a par" with the three identified by Hall and Taylor (1996) a decade before. Their goal, in proposing their supposedly brand new insight into institutionalism, is to identify *when* discourse needs to be factored into the analysis (Schmidt and Radaelli, 2005: 184).[12]

This proposal is founded on a lack of understanding of both historical institutionalism and sociological institutionalism, and even of some of rational choice institutionalism.[13] For historical and sociological institutionalism, ideas are not a "variable." Rather, "ideas are the building blocks of action" that are "embodied in the institutions of the polity" (Hall and Taylor, 1998: 962, 961). I would add that Hall and Taylor might have said they are also "embodied" in actors, providing the meaning that makes their interests as well as actions. With its ties to Marx ("men make their history" but under constraint) and Weber ("ideas, like a switchman, have determined the tracks…") historical institutionalism can not rip the ideational from its social anchors, any more than it can rip variables from their temporal context.[14]

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[12] "Discursive institutionalism" was correctly identified in 2001 by Campbell and Pedersen in their edited volume as a paradigm influenced by European discourse and linguistic analysis. According to them, it was particularly influential in the Scandinavian countries (2001: 6), dating back to the early 1990s. It is hardly, then, of the "recent vintage" that Vivien Schmidt claims to have invented (Schmidt, 2008: 304). In large part, the reason she is blind to this pre-existing paradigm/approach is because its adherents refuse to separate "discourse" from the institutions and from the meaning structures within institutions and used by actors. For them, discourse is not a variable.

[13] See the comment by Thelen (1999, 380, note 12) which identifies the ideational focus within rational choice institutionalism.

[14] Pierson (2000: 72) uses this language for time.

An alternative – ideas and representation

Such standard formulations of historical institutionalism linking ideas and processes resonate directly with claims about the advantages of analyzing social representations within the European Union. For example, as Frédéric Mérand (2006: 134) writes, for "… European security policy-makers, social representations about the role of the state, the nature of security problems or organizational goals are likely to prevail over narrow definitions of interest, broad conceptions of culture or domestic pressures."

This paper begins from the following premise (Jenson, 1989: 237-38): "The terrain on which actors struggle for representation is the *universe of political discourse,* a space in which socially-constructed … practices and meaning systems jostle with each other for social attention and legitimacy." In this perspective, representation involves "the power to give meaning to social relations and thereby to represent and dispute over 'interests'" (Jenson, 1990: 663). These are power relations that can be imagined in terms of the play of light and shadow: light shines on the interests defined as legitimate and shadow casts others into invisibility (Jenson, 1989: 239).

This notion of social representations as meaning-making in action can underpin a policy analysis because it recognizes that "policymaking in virtually all fields takes place within the context of a particular set of ideas that recognize some social interests as more legitimate than others and privilege some lines of policy over others" (Hall, 1993: 292). This return to an historical-institutionalist approach that seeks the constitution of interests in the "embodied ideas" of institutions and actors is just that – a return. I am making no claim for its originality today, but rather that it is a useful way to approach the role of ideas in institutionalism that

allows us to move beyond the diversions created when policy analysis met historical institutionalism in the study of the European Union.

A shifting social policy universe of political discourse. Changing the spotlight, changing the actors

The universe of political discourse within the European Union has been depopulated and repopulated in recent years, with consequences for the content of social policy discussions. As this section describes, new actors from civil society and several epistemic communities have both contributed to and reinforced a shift in social policy perspectives and actions within the institutions of the Commission as they participated in the build-up to the Lisbon strategy prior to 2000 and then its reassessment in 2005 and after.

For more than a decade liberal and social democratic welfare regimes have displayed convergence around ideas for modernization of social models via labor market activation of all adults and new forms of investment, especially in human capital and including early childhood education and care. This can be labelled the social investment perspective (Jenson, 2010: 61-66). This perspective places the emphasis on the future, with as one consequence that investments in human capital and investments in children are an explicit policy focus. In addition, it relies on policy instruments that range from investments in education to supplements to low incomes (in-work benefits) that are meant to help sustain high rates of labor force participation among working-age adults (Jenson and Saint-Martin, 2006; Esping-Andersen *et al*., 2002; Morel, Palier and Palme, 2009). If in the social policy paradigms of the post-1945 years "full employment" meant high rates of employment for – the male – half the population, by the 1990s the "adult-

worker model" underpinned much social and economic policy design (Lewis, 2001).[15] This was often termed "activation." The larger goals of the perspective are to ensure a future in which social exclusion will be minimized by active interventions to maximize social inclusion, intergenerational transfer of disadvantage will be broken, and there will be adequate responses to a knowledge-based economy and a labor market characterized by uncertainty and change. An additional reason was to secure the longevity of social protection programs, especially pensions, that depend on contributions by employees (see Esping-Andersen *et al*., 2002 for a clear presentation).[16]

Several types of institutions have been carriers of this perspective. A social investment emphasis was present in the analyses of the Organization of Economic Cooperation and Development (OECD) by the mid-1990s and in "third way" Britain by the late 1990s (Jenson and Saint-Martin, 2006).   The European Union has been significantly slower to move in these directions, however (Jenson, 2008).   While long focused on efforts to increase employment rates and on the sustainability of social protection systems, it has only been since 2005 that it has converted its representation of social policy challenges and solutions to a focus on fighting social exclusion by investing in children and human capital in order to ensure the future. The mid-term review of the Lisbon Strategy revealed that the shift was underway, but as we will see it began long before mid-decade when the spotlight shifted in the universe of political discourse to render it visible. New actors had been working to advance their own interests and identities within the EU institutions and were giving shape to the ideas that would reconfigure the universe into one characterized by a social investment perspective.

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[15] The implantation of the adult-worker model has not meant always meant two full-time workers. Often one member of the family – usually the woman – only works part-time when young children are in the home.
[16] This objective helps to explain in large part the focus on demography in many EU documents (Jenson, 2008: 7).

Social policy growth spurts. Reconfigured representational practices of social actors

There have been three "growth spurts" in the EU's social policy agendas (from Daly, 2008: 2-4). The first was in the 1970s, which gave rise to, *inter alia*, the social action program of 1974, centred on full and better employment, upgraded living and working conditions and greater involvement of the social partners in economic and social decisions. The second was during the Delors years at the end of the 1980s and beginning of the 1990s. Labor market issues still dominated discourse and action around the social model but a reorientation gave rise to the *Protocol on Social Policy*, attached to the Maastricht Treaty and revised for inclusion in the Amsterdam Treaty. This moment included several innovations in the institutional governance practices of EU social policy: qualified voting for a range of labor market issues (health and safety, equal treatment, inclusion of those excluded from the labor market) and increasing space for involvement by the social partners. In both of these first two moments of intensified social policy activity, the social representations of relevant participants and their interests deployed by European institutions and Member States concentrated on the world of employment and working-age Europeans.

Both unions and employers, with their workplace-derived identities and social representations, were the major actors from civil society recognized as having legitimate access to the European Union. Their ideas and their identities gave meaning to the representation of a "European social model." Carried by unions, its social democratic and Christian democratic roots implied recognition of workers and employers as the main intermediary institutions. These organizations participated in sustaining a representation of the goal of public action as being the maintenance of

"… a humane social order based upon the mixed economy, civilized industrial relations, the welfare state, and a commitment to social justice" (Ross, 1995: 46).

In this universe of political discourse, political, economic and social citizenship were important goals. Governance practices were inclusive of unions and employers. These social partners were incorporated into decision-making, giving them a role in agenda-setting generally (Daly, 2008: 3). The clearest manifestation of this representation of "proper" social relations in the EU was institutionalized recognition of the social dialogue route to law-making inserted into the Maastricht Social Protocol (Ross, 2001: 198ff.).

Of course unions were not the only civil society actors involved. Others were present but they were compelled to work within the constraints of the labor-focused social policy domain. Perhaps the principal additional civil society actor was women's movements that manoeuvred within the possibilities of article 119 of the Treaty of Rome to shove open the workplace and advance their social representation of women as deserving equality in employment (Hoskyns, 1996: Chapters 3-4; Hubert, 2001). Challenges taken to the European Court of Justice as well as other forms mobilization eventually culminated in the important directives on equal pay and equal treatment in the mid-1970s, making this movement in the direction of equality one of two lasting legacies of the social action program moment (Daly, 2008: 3).

Leading in the push for these reforms and for recognition of the gender identities and ideas about social relations that sustained them, were the feminists and women's movements that increasingly targeted the EU level for political action. In doing so, they carried their ideas about the roots of gender inequality into the institutions and represented their identities in much more

multidimensional ways than simply as female workers. They achieved institutionalization of some of their ideas about how to achieve gender equality in at least three actions of the European Union. One was the creation of an Equal Opportunities Unit in 1976 and the start of Action Programs on the Promotion of Equal Opportunities for Women. This Unit had an ambitious agenda that went far beyond employment, intervening to advance the position of women in politics, business, science and so on. The unit provided a political space in which ideas about the European dimensions of gender equality could circulate and be elaborated in dialogue with civil society groups as well as femocrats within the other institutions (Hubert, 2001). A second form of institutionalization was the creation of a number of expert committees and working groups bridging the boundaries between civil society and the European Commission (Hoskyns, 1996: 124ff). And third there were policy developments, such as mobilization around childcare which the Equal Opportunities Unit infused with a gender equality mission of greater sharing of work and care (Ross, 2001; Lewis, 2006: 431 for example).

The Unit promoted what was in essence a "parity" vision of society in which gender was a fundamental difference unlike any other, and therefore meriting unique recognition. The highpoint of influence of these ideas about equal opportunities and the influence of their carriers was the consecration of gender mainstreaming in EU policy in 1996 and its incorporation into the 1997 Amsterdam Treaty that identifies equality between women and men as a fundamental value to be promoted (article 2) and lays down the principle of gender mainstreaming (article 3).

This ambitious "equal opportunities" representation of social relations had already begun to lose ground in the mid-1990s, however. It was being overshadowed by two important changes that were already reworking the play of light and shadow in the universe of political discourse.

Institutionally, the Unit's budget was halved in 1995 and its director, a committed feminist, was removed (Ross, 2001: 207). This institutional redesign reflected the instability and conflict within the policy domain more generally. A first manifestation was the movement, first within the European Employment Strategy (EES) and then the Lisbon strategy, towards a policy commitment to labor force activation. As Member States were doing, the European Union abandoned the male breadwinner model in favour of an adult worker model (Lewis, 2006). In concrete policy terms, these ideas purveyed by a variety of actors generated the now well-known commitment to increasing to 60% by 2010 the employment rates of women across the Union. To many observers, this representation of the European labor force was accompanied by a major re-signification of childcare policy. Instead of serving to advance gender equality in the home as well as workplace via sharing of responsibilities, it was represented simply as necessary to allow women to reconcile work and family life as they moved into paid work.[17]

The second important modification of the universe of political discourse involved a major expansion in the recognition of legitimate participants in social policy, with their interests and their identities. Through the 1990s there had been mobilization of actors with a variety of other identities claiming space within the anti-discrimination machinery of the European Union. Mobilization around movement identities linked to disability, religion, race and ethnicity succeeded in expanding the constitutional representation of those with the right to protection against discrimination. The Amsterdam Treaty innovated by including articles promising to combat discrimination based on racial or ethnic origin, religion or belief, disability, age or sexual orientation (article 13). These ideas about discrimination effectively displaced the parity

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[17] Numerous analyses focus on this change in ideas and representation of gender, using a variety of approaches, such as framing (Lewis, 2006; Lombardo and Meier, 2008) as well as normative assessments (for example Stratigaki, 2004).

assumptions that had underpinned the representation of gender difference as a unique social distinction.

This multiplication of groups with a range of social identities and interests was linked to a major new factor in social policy, associated with the third growth spurt: the identification of social exclusion as the primary social problem to be addressed (Daly, 2008: 3 and 4ff). If labor market activation had become a social policy principle, it was prioritized because it was described as a primary tool for combating and preventing social exclusion. This was a reorientation of the social field away from the full employment and improved working conditions of the era of the "European social model" towards a focus on social exclusion and those suffering from discrimination. With it came a shift in representational practices in social policy-making. Participation and dialogue would henceforth include the organizations of the excluded, the poor, and the socially marginalized and discriminated against of all kinds.

The way towards this broadening of representation was founded on claims-making that had seen the Amsterdam Treaty add an item to the social protocol – the possibility of adopting initiatives specifically designed to combat social exclusion.[18] Beyond confirming the Union's competence in the social field, this seemingly small addition of a sixth item to the list of action areas opened the door wide to a whole different set of social representations.

Representing the objective of social policy as one of preventing social exclusion is quite different from the idea that social policy is meant to promote equality. Ideas of increasing inclusion

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[18] http://europa.eu/scadplus/leg/en/lvb/a14000.htm

resonate with many more actors in civil society than just the social partners or equality-seeking movements, such as the women's movement.

In the years leading up to Lisbon, the Commission had been actively encouraging the involvement of a wide range of actors in social policy in the name of better governance. The EU had been under pressure for years to address the democratic deficit. Civil society actors mobilized against "the power of Brussels" and its lack of democratic transparency. Thus a logic of participation, replacing (or at least amplifying) that of intergovernmentalism underpins the representation of European democracy laid out in the 2001 *White Paper on European Governance*. It identified participation as one of the five principles of good governance. Improved participation is supposed to enhance both the efficiency and the legitimacy of European governance. The focus is particularly on: "a stronger interaction with regional and local governments and civil society," via "a more systematic dialogue with representatives of regional and local governments"; flexibility in implementation of Community legislation; minimum standards for consultation; and "partnership arrangements" for consultation in return for guarantees of representativity (European Commission, 2001: 4).

Experiments with most of these participatory forms in and through the EES and Lisbon processes were underway well before the *White Paper* appeared. The Commission had called for involvement of civil society organizations alongside the social partners in the EES and had offered incentives to participate (De la Porte and Pochet, 2005: 363ff). It continued to call for broad involvement after 2000. The idea was received coolly by unions and with indifference by most non-governmental organizations. Nonetheless, De la Porte and Pochet (2005: 366-67) describe some key exceptions. With respect to the EES, the Irish anti-poverty NGOs were game

to play, and the European Anti-Poverty Network (EAPN) was ready to spread its ideas and analysis of the links between employment policy and poverty. In the social inclusion domain, including the open method of coordination (OMC), the EAPN has been very active. It participated in the development of the political objectives of the OMC, was involved in the process to develop indicators, and organized annual roundtables on social inclusion with the DG Employment (De la Porte and Pochet, 2005: 375-76).

Why do these governance practices matter? First, they matter because they alter the composition of the universe of political discourse. The EU opened a door with its decision to broaden the definition of its relevant partners in the social field and its consequent inclusion of them in formal locales of policy design and decision. Purveyors of social representations of poverty and disadvantage could legitimately enter. Their very identity is one that attributes social exclusion to more than exclusion from the labor market, and they could offer their own representations of the failings of the European social model. In the puzzling stages of policy-making these groups were at the table, could act strategically in promoting their ends, and in doing so deployed representations about social relations that were different from the classic social democratic notions of production relations as the foundation of society and the route to social justice.

This opening in the universe of political discourse matters for a second reason as well. It created space for new patterns of alliance that eventually led toward reinforcement of the social investment perspective. Immediately after 2000 anti-poverty NGOs maintained the same focus on adults and on the present found in the classic representations of the European social model. They could easily engage in alliances with women's movements for greater equality and with

unions around better wages. Then, as an anti-poverty activist and expert within the EU institutions put it, their interests and their ideas about social policy began to change:

> Lisbon was quite a positive political climate, but fairly soon after, with the economic downturns and things, we were in a much more difficult set of circumstances and we needed to be thinking a bit more strategically about things that could sell politically more easily to keep the process going. It seemed to me that one of those issues was child poverty because it still allowed you to raise employment issues, equality issues, gender issues, rights issues.[19]

But this choice was not "simply" strategic, nor did it necessarily mean that the alliances would hold. National anti-poverty actions in Ireland for example had focused on child poverty through the 1990s. Therefore, falling back to child poverty was consistent with these NGOs identity, whereas unions and women's groups had no such representational resources. Indeed, talking about child poverty was a threat to their identity and therefore they often got stuck on the – very reasonable – claim that "children live in families" and therefore attention should go to adults.

Child poverty was, however, strategically appealing because it was the representation that several Member States were already using.[20] As the same expert put it: "We had the first round of national action plans in 2001. And what was very clear from that was that a large number of member States were mentioning the high poverty among children as being a concern."[21] This observation opened the door to issue entrepreneurs within the European institutions (sometimes coming directly from civil society organizations) to argue for funding projects (for example in EQUAL and then PROGRESS), to advance their preferred language in the social inclusion

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[19] Interview, Brussels, 23 March 2007. The author conducted a series of interviews in fall 2006 and spring 2007 in Brussels with high-level actors, including persons from the European Commission, experts consulted by the Commission or national Presidencies, and leaders of NGOs. The responses are reported in the language of the interview.

[20] The UK after 1997 had put the spotlight on child poverty (Dobrowolsky and Jenson, 2005). But international organizations such as UNICEF and other countries, both in Scandinavia and France for example, were doing the same (Jenson and Saint-Martin, 2006: 440-41).

[21] Interview, Brussels, 23 March 2007.

documents, and generally to advance their framing of the social policy challenges. The representations of poverty, its causes and solutions, then fed back into the European institutions. Not surprisingly, by 2006 child poverty had emerged as a "strong issue" in the joint social inclusion reports while simple poverty (that is, of adults) had disappeared from the policy agenda (Daly, 2006: 10). In the Communication from the Commission about 2020, children were singled out under the rubric of "fighting poverty," the one social goal present in this very productivist document (European Commission, 2010: 16).

New light on the problem. Experts promote a "child poverty" lens

The institutional structures initiated to make the Lisbon Strategy work, and especially its innovative open method of coordination, had a second unintended effect on the composition of the universe of political discourse. It became populated with members of a new epistemic community – social statisticians committed to using social statistics as a tool for policy change. The OMC's representation of social inclusion proceeding via gradual movement towards benchmarks has provided space within the universe of political discourse for a set of experts, the statisticians who design indicators for purposes of benchmarking.[22] Their personal identity is primarily as engaged intellectuals and experts involved in boundary-crossing from the academic to the political world, and this boundary crossing leads them to struggle with their ideas about poverty and how best to advance their political agenda in the context in which they had to work. Nonetheless, their own representation of their role is that it is quite technical and formally

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[22] As Tony Atkinson of Oxford, dean of this group of experts within the EU, notes: "It is somewhat ironic because we used to teach about the planned economies and their use of indicators, and how indicators were a road to disaster!" Interview, Warsaw Poland, 16 June 2007.

apolitical.[23] Despite this, they have also made significant contributions to consolidating the social investment perspective within broader policy communities.

Experts in quantitative and qualitative indicators, they worked on their indicators in ways which eventually made them major contributors the view of social policy as concerned with children. In other words, they made major contributions to the solidification of the social investment perspective via the mobilization of their expertise.

The Belgian Presidency in the second half of 2001 decided to work on the social inclusion OMC and its indicators and to begin setting up the pension OMC. In the case of the first, there was a direct link to the worldview of the Belgian minister assigned to organize the Presidency, Frank Vandenbroucke, Minister of Pensions. He was personally convinced of the need to set norms and indicators in order to modernize social security.[24] The Belgian presidency, therefore, called on four European experts[25] in social indicators to prepare a report for a major public discussion of the social inclusion OMC. Despite serious conflicts with the official machinery of the EU over who was responsible for constructing the indicators, the Belgian presidency did eventually

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[23] Interviews, Brussels, 1 February 2007 and 9 February 2007.

[24] In one of his first speeches as minister, in 1999, taking up the general topic of modernizing social security, he said: « L'Europe devrait ainsi s'imposer des standards d'excellence en matière de lutte contre la pauvreté et échanger systématiquement les meilleures pratiques en la matière. Imaginons que tous les Etats membres européens s'engagent à atteindre dans ce domaine dans les quinze ans ce que les trois meilleurs ont atteint, …. Si tous les Etats membres européens atteignent les mêmes résultats dans la lutte contre la pauvreté que les trois meilleurs Etats membres, il y aurait 20 millions de pauvres de moins en Europe. … J'ai connaissance des problèmes statistiques qui se posent lorsqu'il s'agit de formuler une pareille norme avec précision … Et je connais surtout l'ampleur de la résistance politique à l'égard d'objectifs précis. Mais Rome ne s'est pas non plus construite en un jour » Speech, 13 December 1999, available on : http://oud.frankvandenbroucke.be/html/soc/ZT-991213.htm. Consulted 20 April 2010.

[25] The group was headed by Tony Atkinson of Oxford, and included the Belgian academic, Bea Cantillon, a statistician who had worked for Eurostat, Éric Marlier, and Brian Nolan, an Irish expert who had collaborated with Irish anti-poverty NGOs and governmental agencies. Interviews, Brussels, 1 February 2007 and 22 March 2007.

generate agreement at the Council on moving the agenda forward (European Council, December 2001, art. 28).[26]

While there was little idea of social investment underpinning the work on indicators for the Belgian presidency, by 2004 Tony Atkinson was involved in the high-level group on the future of social policy (High Level Group, 2004). It made a pitch for more attention to investment in children. Atkinson describes, for himself, a classic case of realigning his ideas to protect his own identity as an expert engaged in policy transfer during the writing of a report to the Luxembourg presidency in 2005.[27] He said:[28]

> It was a difficult time because it was right after the Kok report which the Luxembourg prime minister was very opposed to …. So we were writing the report, not quite clear on what we were doing, in the sense that for the previous one [2001] it was a clear victory just *to have* a set of indicators. We actually came up with the idea of children mainstreaming to link into the idea of investing in the future [which had been in the report of the high level group on the future of social policy] chaired by a very good French lawyer Olivier Dutheillet de Lamothe and Maria João Rodrigues. … there was quite a lot about the intergenerational compact (which Olivier came up with) which has some of the same notions as investing in the life cycle and quite rightly he suggested that we could somewhat resolve the tension between pensions and the problem of children, since people would be much more willing to give up their pensions rights if they saw the money invested in their grandchildren. So there is this notion of the lifecycle intergenerational pact which involves investment in children. So we took that and integrated it into the Luxembourg report.

Overall, then, this move towards reliance on social indicators opened the universe of political discourse to a new group of analysts and gave them legitimacy. Yet, just as other actors they had to find a way to enter the conversation, which by 2005 had become difficult. They chose the language of "mainstreaming children" in part for the same reasons the anti-poverty activist

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[26] Interview, Brussels, 22 March 2007.
[27] The Luxembourg presidency brought back together the same four expert social statisticians who had worked in 2001 for the Belgian presidency. The revised report is published as Marlier *et al*. (2006).
[28] Interview with Tony Atkinson, Warsaw, 16 June 2007.

quoted above gave – it was a representation that allowed for a declension of other issues, such as

pensions, basic income, and so on.

But also it served to move the conversation forward. Their efforts to say something useful, in the

particular policy context of the second half of the decade, led the experts to rethink their

indicators and their ways of presenting them.   As with the anti-poverty NGOs, the take-up of a

social investment perspective and then their own contribution to pushing it further was possible

because it posed no threat to the integrity of their professional identity. Their goal was to be

useful while maintaining their professional norms. Therefore, when initial drafts of their report

to the Luxembourg presidency were criticized for not moving the agenda sufficiently, more focus

on social investment was selected as the solution:

> Because we were being quite criticized on the first [draft of the] report and we were
> trying to give it some clear focus. And we discussed it: What is it about? What is the
> point? What's new? …   What we did, then, was to write a report, in which at the end
> of each chapter, in general terms, we had a last section about children. It was a way
> to give focus to issues we were raising. And actually it had some very interesting
> consequences which had not occurred to me. It is certainly true that if you approach
> the design of indicators through the perspective view of children, it does lead you in
> different directions than starting from the indicators and then saying "let's subdivide
> the population and ask how many children are living in workless households." You
> come up with, as we said in the report, different things you want look at.[29]

What was for the academics a solution to an analytic dilemma and a professional challenge could

then become a reinforcement of a new discourse about investments and investing in children.

From welfare regimes to investing in children. An epistemic community changes course

A second epistemic community also provided a set of new ideas about social investment that

intersected with the focus on child poverty and social exclusion that anti-poverty groups were

developing. This too involved an effort by engaged policy experts (sometimes termed policy

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[29] Interview with Tony Atkinson, Warsaw. 16 June 2007.

wonks) who were committed to moving the European debate in directions that they considered to be more conducive to their preferred policy outcomes. Concerned about the dangers of "permanent austerity" and unsustainable policy design, they reworked their analyses, coming up with various positions justifying a social investment perspective.

In the papers commissioned for the Portuguese presidency in 2000, there was only one voice calling for a focus on children and young families. Gøsta Esping-Andersen was developing his arguments about the intersections of sustainability of welfare states, women's employment and childcare. He wrote at the time of the need for a "social investment bias" in any reform (Rodriques, 2002: 77ff.; 75). His analysis was surrounded by the others who presented standard economic and social analyses.

A next step in the process came when the 2001 Belgian presidency commissioned him along with three other experts to contribute to the discussion of pensions. As the preface to the resulting publication says (Esping-Andersen, *et al.*, 2002: xxv):

> the Belgian Presidency gave special attention to the development of the 'Open Method of Coordination' in the area of pensions …. Our report was conceived as a contribution to this project, even though it casts the net far wider. Its authors believe that long-term and sustainable solutions to ageing and retirement must take a broad life course perspective. … Hence, the report attempted to draw systematic links between old age, adult working age life, families and children.

In 2001 this broad net was not widely appreciated. The report caused much conflict within the Presidency. The reframing of pensions to mean investing in children was anathema to the Minister, Frank Vandenbrouke. As someone who worked on the Presidency described the

situation, the conflict was immediate and intense, and precisely over the representation of the proper target of social policy.[30]

> … à un certain moment Gøsta Esping-Andersen a envoyé un chapitre de 30 pages. Et le jour après, à 5 heures du matin, Frank Vandenbroucke a envoyé sa réponse à Gøsta Esping-Andersen, c'était également 25 pages. Il a tapé toute la nuit, il a travaillé, il a bossé toute la nuit et après il est allé dormir. Il a expliqué 'désolé, mais ça ne va plus'. Donc c'était une réponse de 25 pages à Gøsta Esping-Andersen dans laquelle il expliquait de A à Z pourquoi il n'était pas du tout d'accord avec son approche, sa vision, surtout sa vision sur les frictions entre les générations et qu'il fallait 'invest more in children and less in the elderly.' [La réponse de Vandenbroucke était] : c'est faux, c'est infaisable, c'est injuste ! Sur tous les fronts, ils étaient en désaccord ... c'était toujours très gentil mais toujours très clair qu'ils étaient sur deux voies complètement différentes.

The result was that, with the exception of the chapter on pensions (written by John Myles and highly appreciated by the Minister) not much was heard about the paper during the Belgian presidency.

Four years later, the situation was different; indeed more of the epistemic community had begun to change position. For example, in a key document prepared for the 2005 British Presidency, Maurizio Ferrera's first policy proposal to European leaders was for an " a specific *focus on children*" (in Diamond *et al*, 2006: 30).[31] In the same document, Joakim Palme vaunted the Nordic model because of its "family policy for children" (in Diamond *et al*., 2006: 40), a somewhat unusual way of presenting that welfare regime.[32]

By summer 2005 when the Presidency was being prepared both within the Commission for President Barroso and by the British, the European social model was the topic and the social

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[30] Interview, Brussels, 22 March 2007.

[31] In 2000, Ferrera's report to the Portuguese Presidency in preparation of the 2000 Lisbon Council provided a classic analysis of whether globalization threatened European welfare regimes. Neither care nor children as objects worthy of policy analysis were mentioned (Ferrera *et al.*, 2000).

[32] The papers in this publication were released just prior to the informal summit at Hampton Court in October 2005. In speaking to the European Parliament on the eve of the meeting, Tony Blair quoted from it, claiming it helped set the agenda for the review of a "social model for Europe." See http://www.number-10.gov.uk/output/Page8384.asp, consulted 20 April 2010.

investment perspective was spreading rapidly. As a well-placed Eurocrat put it, "when you talk about renewing the European social model, you immediately bump into this discourse on the family and new family models. The question of investment is appreciated by economists. It's economists who are directing the work on the social model; it is coordinated by an economist."[33]

Why this greater receptivity by both the academic analysts and the European institutions? The British Presidency and these analyses occurred in the midst of the mid-term review of the Lisbon Strategy and just after the French and Dutch votes against the European Constitutional Treaty. It was a difficult moment for the European Union and the Commission, criticized for being too focused on market-making and liberalization. The opposition from the European Parliament to José Manuel Barroso's confirmation as President of the Commission was linked to his own liberal stands as well as the NO votes which, at least in France, were tied to the EU's stance on social issues and liberalization. This all led to what one insider described this way: "So I think that the Barroso Commission underwent a period of rethink."[34] The rethink led eventually to a stocktaking exercise through 2006-07 and to the 2007 Communication *Opportunities, access and solidarity: towards a new social vision for 21st century Europe* (European Commission, 2007).

There was, in other words, a certain casting around for ideas, a process one that permitted a link to be made between the "investing in children" ideas coming from the European social policy epistemic community and the "social investment" discourse that New Labour in Britain had been using for a decade (Dobrowolsky and Jenson, 2005).[35] As the experts circled through the various

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[33] Interview, Brussels, 4 December 2006.
[34] Interview, Brussels, 7 February 2007.
[35] The leader of the stocktaking exercise and the main author of the consultation document (European Commission, 2007: 3) was Roger Liddle, a long-time Labour Party insider.

institutions, the idea of social investment, with its time frame for the future, gained purchase. This anchoring was a compromise. If there had been a simple and direct importation of the British position, there would have been even more opposition than there was.[36] However, the addition of the more "Nordic" representation of social relations disarmed to some extent the opposition, while the notion of "investment" made a discursive link to economists and their representations of the social as investments in human and social capital. All of this came together in the 2007 Communication which lists seven areas for action: investing in youth, investing in fulfilling careers, investing in longer and healthier lives, investing in gender equality, investing in active inclusion and non-discrimination, investing in mobility and successful integration, investing in civic participation, culture and dialogue (European Commission, 2007: 7-9). Investment had become the *mot du jour*.

European social policy change: Ideas within the institutions

In this paper we have followed the move towards a significant new stage "modernizing" the European social model, including the spread of new representations of the social in the EU's universe of political discourse. The social is now about healthy living and ageing, about early childhood education and care and about participation as much as it is about work. Moreover, even when framed with the objective of advancing "the well-being, quality of life and common values of Europe's citizens" (European Commission, 2007: 1), the emphasis is less on equality or social justice in the here-and-now than on preparing Europeans to roll with the punches of an

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[36] Opposition did exist within the Commission. Parts of DG Employment, Social Affairs and Gender Equality refused to display the same enthusiasm for Esping-Andersen-like positions. Several high-level Eurocrats were described by their colleagues as sticking to « le dialogue social à la manière dont il avait toujours existé ». Interview, Brussels, 4 December 2006.

uncertain world. In the economistic manifesto for 2020, therefore, one key goal is "inclusive growth – a high-employment economy delivering economic, social and territorial cohesion" and the means to achieve it are life-long learning (beginning in preschool), activating the population in order to combat poverty and social exclusion, increasing labor participation (activation) via flexicurity, and reducing health inequalities (European Commission, 2010: 16). Moreover, in an earlier section, entitled "smart, sustainable and inclusive growth," the human capital theme was strengthened by an extension backwards towards pre-school education (European Commission, 2010: 8-11).

This representation has been created by many more actors than those within the institutions of the Union. Epistemic communities bridging academic and policy bureaucracies have made important and varied contributions, even as they worked out shared positions and created coalitions. Civil society actors have mobilized to ensure that their problems – and the representations of them that they carry – are taken into account. As they have the opportunities to participate offered by the Lisbon process, these actors have also contributed to the revision of the universe of discourse itself.   Thus even if European institutions at first encouraged the emergence of new interests and their mobilization as advocacy coalitions, the resulting shift in the universe of defined interests meant that those same institutions had to continue to accept their on-going participation and reproduce their framing of the problem as one of poverty and social inclusion.

In this story we see the effects of ideas.   These ideas are embodied in the actors inside and outside the institutions. We can not assess "when" or "whether" ideas matter, because without ideas there would be no action. They simply matter "all the way down."

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