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Reporting on social exclusion: standard of living and social participation in Hungary, Spain, and Germany

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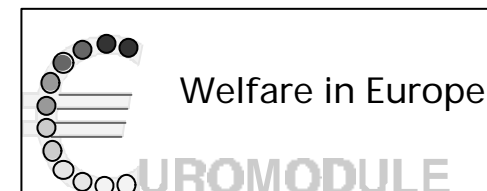
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**Reporting on Social Exclusion:
Standard of Living and Social Participation
in Hungary, Spain, and Germany**

Petra Böhnke

The Euromodule is an initiative of research teams engaged in the field of social reporting and quality of life studies from 18 European countries. The initiative follows a stepwise, bottom-up approach to establishing a European Welfare Survey. Until now a set of basic questions has been developed which consists of a core part, a core standard demography and an optional part to provide detailed information on objective living conditions, subjective well-being and the quality of society. So far, the Euromodule has been carried out in eight countries (Turkey, Sweden, Switzerland, Spain, Slovenia, Italy, Hungary, and Germany). Because there is no central funding, each country has to raise its own financial support. The initiative is coordinated at the Social Science Research Center Berlin.



Working Papers Series

Abstract

The issue of social exclusion, currently of particular concern to policy makers in Brussels, is a manifestation of new aspects of social inequality that are supposed to go along with persistent high unemployment rates and increasing poverty affection. The concept provides a multidimensional and dynamic perspective of the resultant weakened possibilities to participate in social life. The growing acceptance of the term, however, has not been accompanied by a consensus regarding who exactly belong under its rubric nor how this could be verified empirically. This contribution makes an effort to cut down the broad meaning of social exclusion in order to propose dimensions and indicators for measurement and monitoring purposes. With the help of actual data from the *Euromodule*, a representative survey instrument for European welfare comparison, the interplay between standard of living and social participation is analysed in Hungary, Spain, and Germany. The three countries represent different European regions and varying types of welfare and social protection policies. Decisive factors influencing vulnerability to exclusion include relative perceptions of deprivation, the general level of welfare in a country as well as access to support from social networks.

* * *

Prozesse sozialer Ausgrenzung spielen gegenwärtig im europäischen sozialpolitischen Diskurs eine bedeutende Rolle, betont werden neue Aspekte sozialer Ungleichheit, die man insbesondere mit anhaltender Langzeitarbeitslosigkeit und wachsender Armut in Verbindung bringt. Das Exklusionskonzept bietet einen mehrdimensionalen und dynamischen Zugang zur umfassenden Analyse gesellschaftlicher Teilhabe. Trotz der großen Akzeptanz der Ausgrenzungsterminologie steht ein Konsens über Definitionen und empirische Messung bislang aus. In diesem Beitrag werden Dimensionen und Indikatoren zur Messung und Dokumentation von Ausgrenzungsprozessen vorgeschlagen. Mit Hilfe von *Euromodule*-Daten, einer repräsentativen Bevölkerungsumfrage für europäische Wohlfahrtsvergleiche, wird das Zusammenspiel von materiellem Lebensstandard und sozialer Teilhabe in Ungarn, Spanien und Deutschland analysiert. Die drei Länder unterscheiden sich in ihren sozialen Sicherungssystemen ebenso wie in ihrem Wohlfahrtsniveau. Vergleichsprozesse und Unterstützung durch soziale Netzwerke sind zwei wichtige Faktoren, die das Risiko sozialer Ausgrenzung wesentlich beeinflussen.

Contents

| | |
|--|----|
| Introduction..... | 3 |
| 1 On the topic of social exclusion: definitions and socio-political meaning | 5 |
| 2 Social reporting and social exclusion: measurement issues | 7 |
| 3 Country profiles: differences and similarities in Hungary, Spain, and Germany | 11 |
| 4 Monitoring the exposure to social exclusion in Hungary, Spain, and Germany | 15 |
| 4.1 Socio-economic precariousness in Hungary, Spain, and Germany | 15 |
| 4.2 Social scepticism and social-psychological distress in Hungary, Spain, and Germany | 17 |
| 4.3 Marginalisation and exposure to social exclusion: country-specific determinants | 19 |
| Conclusion: European social policy and national experiences of social exclusion | 25 |
| Notes | |
| References | |

Introduction

Nowadays, it is quite common to interpret a number of forms of social disadvantages as social exclusion. This is in line with public debates that predict the splitting up of modern European societies as a result of changing labour market organisation and plans to reduce access to social protection systems. Long-term unemployment rates, poverty affection and the fear of the rise of an urban underclass in particular contribute to the notion of polarised societies with an unbridgeable gap between “insiders” and “outsiders”.

In the course of European integration it is important to have comparable information about the living conditions in the single member states. The convergence of living conditions and the fight against poverty and social exclusion are given high priority in the Maastricht treaty. It is a challenge for social reporting activities and empirical social research to shed some light on ongoing processes of reinforcing disadvantages ending up in denied access to social security systems and the non-realization of social rights. However, currently there is no consensus about the definition of social exclusion, where to establish a threshold between inside and outside or the indicators suitable to comprehensively monitor the phenomenon. At present, extensive research and consideration are in progress to fill these gaps in order to include the social exclusion concept in European and national social policies.

At the European level, the shift from poverty to social exclusion is not merely a shift in terminology. It reflects the need for a multidimensional approach to study social disadvantage. The major concern is to broaden the notion of poverty, which has until recently been predominantly restricted to its financial dimension. In analysing social inequality, this implies a shift from concentrating on the just distribution of material resources to equal opportunities for social participation and the realization of social rights.

The aim of the paper is to give an example how empirical research can deal with central hypothesis of the social exclusion debate and the concept itself. After briefly reviewing definition criteria and the emergence of the concept of social exclusion, a model is proposed for use as a guide in social reporting activities that addresses different levels of exclusion and precariousness. Three central aspects are suggested to cover the risk of social exclusion comprehensively in an empirical perspective: multidimensional deprivation,

weak social participation, and the perception of the respondents themselves to be on the edge of society. With the help of available representative micro data, the assumption that poor living conditions, as indicated by poverty or long-term unemployment, interact with social participation leading to the polarisation of the social structure is analysed. The question is, in which way and to what extent is socio-economic precariousness connected with reduced social participation?

The analysis compares three different countries: *Hungary*, an accession candidate to the European Union slated to join within a few years and a representative of the East European transformation countries. *Spain*, a southern European country with its distinctive welfare mix and central role of family solidarity. And *Germany*, with a continental-conservative welfare system and very good living conditions, but nevertheless experiencing a series of threats to its social protection systems. The empirical results give a comprehensive overview of the standard of living in each country and provide information on the specific consequences for general social scepticism and social-psychological distress. Finally, the socio-demographic characteristics and labour market performance of risk groups experiencing both multidimensional poverty and reduced social participation are compared.

1 On the topic of social exclusion: definitions and socio-political meaning

There is no strong agreement regarding the meaning and central traits of social exclusion. Changes in labour market organisation and social security systems are supposed to result in limited chances for individual participation, economically, socially, culturally as well as politically. The concept is described as comprehensive, multidimensional and dynamic, addressing reinforcing processes of accumulated social disadvantages and the denial of social rights (Sen 2000, Littlewood 1999, Abrahamson 1998, Kronauer 1998, Room 1995). As Graham Room puts it: “Where citizens are unable to secure their social rights, they will tend to suffer processes of generalised and persisting disadvantage and their social and occupational participation will be undermined. It is therefore necessary also to examine patterns and processes of generalized disadvantage in terms of education, training, employment, housing, financial resources, and so on: in short, disparities in the distribution of life chances” (Room 1998: 291).

Thus, such an understanding of social exclusion is closely linked to notions of citizenship and social rights in reference to T. H. Marshall (1950). Despite its analytical and theoretical weakness, the concept of social exclusion has helped foster a particular vision regarding the importance of the granting of basic social rights including access to education, training, employment, housing etc. and of the important role this should play in European integration.¹ In this view, the debate on social exclusion is at the same time a debate on European labour market and social policy reforms. The goal is then to avoid extreme disparities and polarisation of societies with a highly integrated core work force on the one hand and a marginalized group persistently dependent on social benefits on the other.

The term ‘social exclusion’ is originally rooted in the French political debate during the sixties and was intended to describe a broad notion of detachment from mainstream values and social order. It became well known with an estimation made by René Lenoir in 1974 that one-tenth of the French population belonged to the excluded: the mentally and physically handicapped, suicidal people, aged invalids, abused children, drug addicts, delinquents, single parents, multi-problem households and others (Silver 1994: 532).

Issues of reintegration and solidarity have been in the centre of the debate on “exclusion sociale”, pointing out risk groups marginalized from labour market participation, unprotected by social insurance and “invisible” in political debates (Barlösius 2001).

In the early nineties this understanding of social exclusion was pushed into the European discussion on poverty, which until then had been mainly influenced by the Anglo-Saxon research tradition. This approach focuses on issues of relative deprivation and concentrates on access to resources in the first place. Thus, an understanding of disadvantages was developed that tackled the lack of resources as well as inadequate social participation. Since the early nineties, the combat against social exclusion has become a major concern of EU policy. Facilitating participation in employment and access for all to resources, rights, goods and services have become key goals. In order to increase transnational policy cooperation, every single member state has been asked to produce a national action plan on social inclusion by June 2001, which was meant to be the start of activities for implementing guidelines in order to prevent poverty and social exclusion.²

In principle, social exclusion can be related to any lack of essentials in the domain of daily life, be it income, employment, housing, education, social networks, health etc. However, the accumulation process is in the centre of the approach, focusing on labour market access as crucial for exposure to social exclusion risks. Employment and job security promise an income to satisfy basic needs and provide social integration and social identity at the same time. The hypothesis underlying the approach is that the interdependence of social disadvantages and weak labour market attachment is key to the vicious cycle primarily responsible for social exclusion. It is not the analytical substance of the concept of social exclusion that contributes to its enthusiastic prevalence. Instead, the term in its comprehensive and generalizing manner gets to the heart of what recent social changes are supposed to predict: the emergence of a permanently excluded part of the population with severely limited opportunities to participate. At the same time, its ambiguous meaning incorporates the widespread fear that ongoing social changes become a threat to middle class integration and mainstream values.

2 Social reporting and social exclusion: measurement issues

Whereas on the political level several activities are being undertaken to address social exclusion in social policy guidelines, social scientists and empirical researchers are concerned with definition problems, the search for suitable indicators to monitor underlying processes and the establishment of theoretical frameworks.

Up until the present there has been a considerable gap between conceptual thoughts and empirical registration. Not even the small consensus about multidimensionality and the dynamic nature of social exclusion has been given much attention in empirical research (as an exception Paugam 1996, Burchardt 2000); most studies stick to poverty indicators or to the material dimension of supply. The Human Development Report uses the long-term unemployment rate as a proxy for social exclusion in its construction of the Human Poverty Index for industrialised countries (UNDP 2000). Extensive theoretical work on the dimensions and indicators of social exclusion and inclusion exists, but these projects are unfortunately neither connected nor tested with existing data sets (Bermann and Phillips 2000). Analyses concentrating on risk groups in the social reporting tradition use a huge set of indicators from several life domains with special emphasis on socio-economic precariousness (Zapf 1995, Habich 1996, Levitas et al. 2000, Eurostat 2000). A detailed and helpful approach is the work on the European System of Social Indicators (EUSI) collected at the Social Indicators Department, Centre for Survey Research and Methodology in Mannheim headed by Heinz-Herbert Noll.³ Within a set of life domains, indicators are presented to address the issue of social cohesion in a twofold manner: as the reduction of disparities, inequalities and social exclusion on the one hand and the strengthening of social relations, interactions and ties on the other (Berger-Schmidt 2000).

Politics and social sciences have an interest in monitoring social exclusion in an as comprehensive and differentiated manner as possible, which is severely restricted through available data sets and statistical information. Due to the lack of conceptual clarity, it seems most important to carefully reveal the exact meaning of social exclusion referred to in each context. Given the comprehensive notion of social exclusion, at least four levels can be distin-

Figure 1: How to address exclusion and precariousness

- *Social exclusion*: non-realization of social rights, stigmatisation, no access to social protection systems (i. e. homelessness, illiteracy, undernourishment ...)
- *Socio-economic precariousness*: precarious labour market attachment and shortages of supply in several life domains like income, standard of living, housing, education
- *Reduced social participation*: limited possibilities to take part in social, political and cultural life; social-psychological distress, health problems, weak social networks and family ties, general scepticism against society and politics
- *Self-assessment of social integration*: individual perception of possibilities to take part in social life, assessment of living conditions

guished that contain information on social exclusion tendencies in a macro as well as in a micro perspective, and which, furthermore, take objective as well as subjective indicators into consideration (figure 1).

The inability to exercise social rights, the denial of access to social protection systems and stigmatisation processes are surely extreme forms of social exclusion, maybe the only ones that justify the use of such a scandalising vocabulary. Homelessness and illiteracy belong into this category as well as participation deficits, such as not having the right to vote or work. Statistics can hardly cover these truly excluded and unprotected groups who are often not officially represented in the political debate and not even “visible” to instruments of empirical research, especially not in a comparative European perspective.

However, the social exclusion debate on the European level emphasizes a different notion of social exclusion, which can be more convincingly addressed as socio-economic precariousness on the one hand and limited possibilities of social participation on the other hand. *Socio-economic precariousness* is closely linked to multidimensional poverty research and deprivation studies

(Whelan and Whelan 1995, Halleröd 1995, Gordon and Pantazis 1997, Böhnke and Delhey 2001) addressing disadvantages in several life domains that may interact and reinforce each other. Low income, bad housing conditions, inadequate standard of living, education deficits, precarious labour market attachment, unemployment and several other deprivation risks can be summarized using the term *socio-economic precariousness*. *Reduced social participation* goes beyond material deficiencies and stresses the importance of “social membership”. Lots of issues can be raised in this context, first of all family disruption and the weakening of social networks and social support. Moreover, hopelessness and perceived senselessness to change given circumstances can manifest themselves in fears, conflicts and social-psychological distress. In a more general perspective, social scepticism, the lack of political interest and general trust, symptoms of anomie can arise, which might result in a detachment from the moral and social consensus a society is built upon. There is a long tradition in social reporting activities to cover these dimensions with indicators of subjective well-being. Based on this and in order to get a comprehensive picture of social exclusion tendencies, the dimension of *perception* seems an important aspect to include. Issues of satisfaction and the self-assessment of individual living conditions and social integration offer reliable information on the consequences that material shortages have for perceptions of belonging.

Such graduation and differentiation can be related to several life domains as well as to an overall perspective of exclusion and precariousness. Basic assumptions immanent to the social exclusion debate can be analysed. For example, it is possible to test the hypothesis that material deprivation interacts with limited possibilities to take part in social life. Furthermore, the assumption that weak labour market attachment is crucial for reduced social participation can be investigated as well.

Which indicators are available to fill in the above mentioned scheme in order to provide comparable information regarding a nation’s exposure to social exclusion as well as of the individual’s exposure to precariousness and reduced social participation? A vast amount of statistical information is available at the European level; nevertheless, sources to provide an overview of homelessness, integration of disabled persons, migration problems or the non-realization of access to social protection systems for central as well as for

East European countries do not exist. Of course, lots of efforts have been undertaken to address some of these issues and increasing attention is being paid to homelessness and housing policies.⁴

It is much easier to get an overview of the general welfare development and inequality structure in European Countries. Nevertheless, comparable representative micro data that provide information on objective living conditions in several life domains as well as on subjective well-being and the issue of participation hardly exist. In the following analysis, I will take advantage of data from the *Euromodule*-initiative, which is heading towards a European welfare survey providing individual data on living conditions, well-being and quality of society in several life domains such as housing, income, employment, social relations etc. (Delhey et al. 2001). I will offer a picture of the exposure to precariousness, in as comprehensive a manner as possible, for Spain, Hungary and Germany. The three countries are chosen to provide inside view of the specific characteristics of social exclusion in different regions and welfare regimes of Europe.

3 Country profiles: differences and similarities in Hungary, Spain, and Germany

Taking information from the Human Development Report as a starting point, the three countries chosen are seen as having a fairly high level of Human Development in 1998 (Germany ranks 14, Spain 21 and Hungary 43 on the respective index, summarising information on life expectancy, knowledge and standard of living, UNDP 2000). However, the three countries differ considerably in their history and levels of welfare achievement and inequality exposure. Moreover, religious ties and family solidarity are much more dominant in Spanish and Hungarian everyday life than they are in Germany.

According to Esping-Anderson's typology of welfare state regimes, Germany fits as a prototype for the conservative or continental grouping. Welfare regimes are characterised by different institutional arrangements, by specific stratification systems as an outcome of social policy and by different "moral" logics behind these policies. In comparison, Germany is a rich society with a high degree of political stability. People have relatively good access to welfare and social security. The Bismarckian tradition centres on the linkage between employment position and social entitlements, the majority of the population is covered by insurance schemes through individual or derived rights from family status. Replacement rates are generous, thus taxing levels are high. Nevertheless, Germany faces problems of ongoing modernization. Among the social problems in need of resolution unemployment surely is the biggest one. In East Germany living conditions improved rapidly for the majority of the population during transformation, yet East Germany is not capable of producing this high level of welfare on its own. Stable institutions of law, democracy and social security were transferred. On the negative side, unemployment is very high and many East Germans feel dominated by the larger and richer western half of the country.

The preservation of status differentials was, and is, the predominant principle of the social protection system. Financial transfers are allocated according to previous income. As a consequence, rights are attached to class and status. Through compulsory insurance, the state supplements the market as a provider of welfare. The emphasis on upholding status differences means that its redistributive impact is relatively low. With the means-tested social

assistance (Sozialhilfe), the German system also contains an instrument especially designed to fight poverty. During the past decade, income inequality has risen slightly in West Germany, and there has been a moderate increase in the number of poor. Current debates emphasise elements of privatisation to be combined with the given structures of the social security system. The growing number of pensioners and the decrease in the number of regular and lifelong contributions to social benefit funds are creating an urgent need to rethink distribution policies.

Spain is similar to Germany as far as the occupational focus of social benefit support is concerned. Nevertheless, there are striking differences, which contribute to characterise Spain, together with other southern European countries, as a special type of welfare state, often called a rudimentary, post-authoritarian “latin rim model” (Lessenich 1995). Although this is a controversial classification (Rhodes 1997), the distinctive welfare mix with special emphasis on the central role of families as providers of social services is crucial for the southern European grouping. As a Beveridgean element of social protection, a universal national health care system is provided. Nevertheless, generous social support is offered to people who are occupationally well integrated, but persons who lack formal labour market status are only poorly addressed (Martin 1997).

In reaction to rising unemployment rates, labour market flexibility was pushed forward during the 1980s resulting in a rise in the number of destandardised occupations and precarious and temporary contracts. Despite the high degree of labour market flexibility and high unemployment rates the social protection system remained rudimentary. During the 1990s, efforts to strengthen elements of basic social protection were made and a general social assistance fund and regional programmes to support those outside regular work force were established. Although high unemployment and poverty affection creates widespread insecurity, this does not result in a high degree of homelessness, criminal offences or other forms of extreme social exclusion. This is explained with reference to traditional, non-governmental forms of social support provided by churches and family networks (Laparra and Aguilar 1997). There is a high degree of cross-generational cohabitation with intense solidarity networks and single-person households remaining an exception (Guerrero and Naldini 1997).

Table 1: Country specifics: Hungary, Spain, and Germany

| | Hungary | Spain | Germany |
|---|-------------------|-------|---------|
| Human Development Index, rank, 1998 ¹ | 43 | 21 | 14 |
| Unemployment rate, total, %, 1998 ¹ | 7,8 | 18,8 | 9,4 |
| Proportion under age of 25 ² | 28 | 30,1 | 11,8 |
| Gross income / dependent employed, ECU, 1997 ³ | 5488 | 21916 | 32338 |
| Poverty rate, 50% of medium income ¹ | 11 | 9,1 | 5,9 |
| Long-term unemployment rate as % of labour force, 1998 ¹ | 4 | 10,2 | 4,9 |
| Long-term unemployment rate as % of total unemployed, 1999 ⁴ | - | 46 | 51 |
| Gini, 1996 ⁵ | 0.30 ⁶ | 0.33 | 0.28 |

Notes: ¹ UNDP (2000); ² Statistisches Bundesamt (2000a); ³ Statistisches Bundesamt (2000b); ⁴ Eurostat (2000a); ⁵ Eurostat (2000b); ⁶ Habich and Spéder (1999).

Hungary, like other countries in Eastern Europe, had to overcome the deep “transformational recession“ after the breakdown of the socialist regimes. During the 1990s Hungary underwent a process of modernization, both political and economic, accompanied by high social costs of transition for the majority of the people. Real wages declined, income inequality rose, and there was an increase in crime and other indicators of damaged social cohesion. High unemployment rates have been the most visible sign of transformation costs with widespread lack of security, pessimism and resignation as a result. By 1998 the Hungarian economy and society had overcome the most difficult challenges of the transformation; structural adjustment of the economy was close to complete and the sector structure resembled that of West-European economies. The consequences of economic recession and the growth of unemployment and poverty shaped the demand for welfare redistribution. Moreover, Hungarian policies have been altered to allow Hungary to meet EU obligations so that it will be able to join the Union within a few years. Although the amount of social expenditure has risen, poverty is a severe problem in Hungary. Low income is highly correlated with the situation in the formal labour market and with insufficient individual skill levels. Furthermore, household size and poverty incidence often go together and extended households arise as a result of poverty affection (Grootaert and Braithwaite 1999).

Table 2: Standard of living in three dimensions:
housing, basic consumption and financial resources

| | | Hungary | Spain | Ger- many |
|-----------------------------------|---|-----------------|-----------|--------------|
| | | % of population | | |
| Housing | No bath / shower | 9 | 1 | 1 |
| | No hot running water | 13 | 1 | 1 |
| | No central heating / electric heater | 19 | 12 | 4 |
| | Limited space ¹ | 24 | 9 | 8 |
| | Low satisfaction with apartment/house ² | 17 | 6 | 6 |
| | <i>Accumulation: 2 and more items</i> | <i>19</i> | <i>4</i> | <i>3</i> |
| Basic Consumption ³ | One cooked meal per day | 1 | 1 | 1 |
| | Phone | 13 | 4 | 1 |
| | TV | 13 | 4 | 1 |
| | Washing machine | 18 | 1 | 1 |
| | Car | 27 | 15 | 10 |
| | New clothes regularly | 54 | 18 | 14 |
| | Replace worn out furniture | 57 | 33 | 19 |
| | Low satisfaction with standard of living ² | 37 | 8 | 7 |
| | <i>Accumulation: 3 and more items</i> | <i>39</i> | <i>10</i> | <i>7</i> |
| Financial Resources | Great difficulties making ends meet | 27 | 5 | 3 |
| | Financial situation has clearly deteriorated | 16 | 3 | 3 |
| | Low satisfaction with household income ² | 57 | 19 | 15 |
| | <i>Accumulation: 2 and more items</i> | <i>29</i> | <i>5</i> | <i>3</i> |

Notes: N (Total) in Hungary: 1508; in Spain: 2489; in Germany: 2413.

¹ Cannot afford an apartment in which every household member has a room on his or her own.

² Summing up 0-4 scores at a 0-10 satisfaction scale (0 = completely dissatisfied; 10 = completely satisfied); mean satisfaction with apartment/house in Hungary (6,8), in Spain (7,5), in Germany (8,5); mean satisfaction with standard of living in Hungary (5,0), in Spain (6,8), in Germany (7,4); mean satisfaction with household income in Hungary (3,9), in Spain (6,1), in Germany (6,7).

³ Household cannot afford listed items.

Source: Euromodule Germany (1999), Euromodule Hungary (1999), Euromodule Spain (2000).

4 Monitoring the exposure to social exclusion in Hungary, Spain, and Germany

4.1 Socio-economic precariousness in Hungary, Spain, and Germany

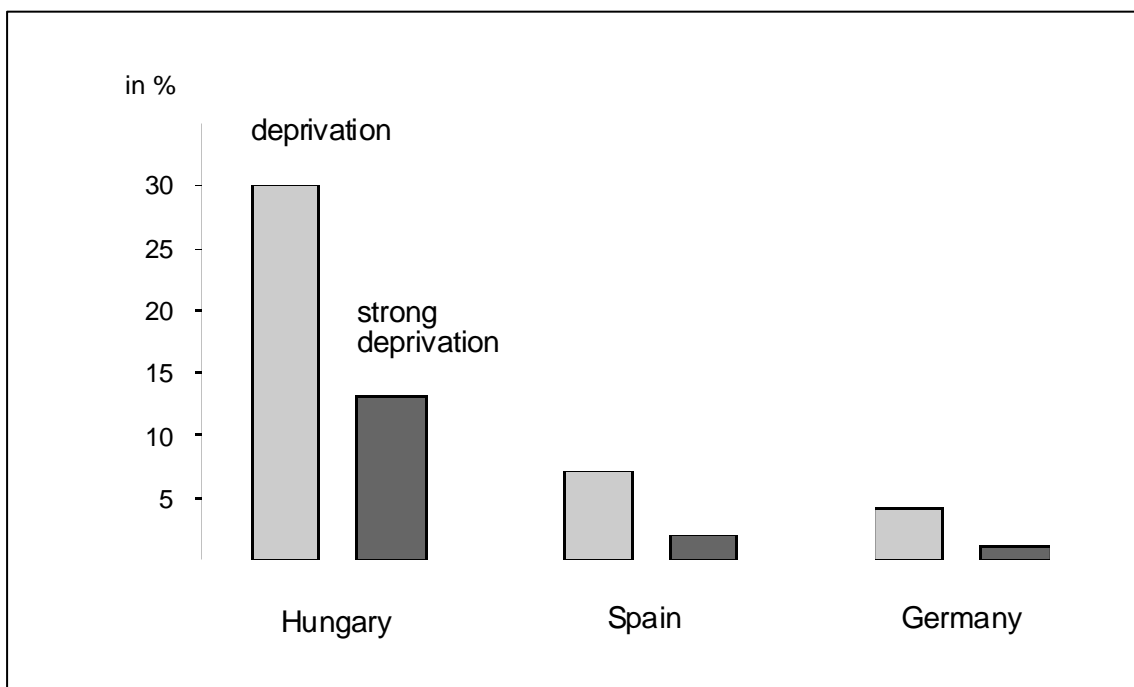
Bearing these country profiles in mind, we can expect differentiated standards of living to be associated with varying exposure to precarious living conditions. Overall, micro data on the Hungarian population indicate it has the poorest comparative standard of living. Nevertheless, unemployment and insecure labour market attachment are also particularly widespread in Spain, and consequences for individual well-being are expected. Whether or not these effects are attenuated by family solidarity remains an important factor to bear in mind. In the following, empirical results are presented in order to provide insight into the multidimensionality of poverty and precariousness. Standard of living is measured in three dimensions: housing situation, basic consumption patterns and the financial circumstances of the household (table 2).

In fact, according to the results there is a considerable gap between standard of living in Hungary on the one hand and Spain and Germany on the other hand. Hungarians have great difficulties in accessing basic supplies: every fifth Hungarian household faces housing deprivation, every third lacks provision with basic consumption goods. Severe financial problems are six times more likely to occur in Hungarian households than in Spanish households. Whereas in Spain and Germany living without a bath, a shower or hot running water is the utter exception, housing conditions in Hungary are considerably poorer. Nine percent of the population there does not have a bath or a shower in their apartment and 13 percent are without hot running water. Concerning basic consumption patterns, the only shared standard in all of the three countries is access to one cooked meal per day. Access to phones, TVs, washing machines and cars differs greatly in the three countries. In Hungary about every third household has great difficulties making ends meet and, moreover, must cope

with a deterioration of its financial situation. Corresponding figures in Spain and Germany amount to only three percent. The subjective evaluation of the housing, consumption and income situation, measured with satisfaction scales, mirrors the different levels of supply quite clearly. Dissatisfaction levels are much higher in Hungary in comparison to the other central and southern European representatives. Standards of living in Spain and Germany are almost at the same level, with Spain lagging just a little behind. Differences are mainly perceptible in consumption patterns such as access to a car, regular new clothing or the replacement of worn out furniture.

However, one central aspect of social exclusion and new poverty is its multidimensionality. Income data is insufficient for measuring social exclusion because poor living conditions are more reliably captured by several overlapping indicators that measure deprivation in different life domains.

Figure 2: Socio-economic precariousness: overlap of disadvantages in the housing, consumption and income domain (in % of population)



Notes: Affected by deprivation means experiencing an overlap of at least one item for each domain (housing, consumption and income), affected by strong deprivation means experiencing an overlap of at least two items for the housing and consumption domain and one item for the income domain.

Source: Euromodule Germany (1999), Euromodule Hungary (1999), Euromodule Spain (2000).

When turning to such multidimensional deprivation – experiencing disadvantages in the housing, consumption and financial domain at the same time – even differences between Spain and Germany get more pronounced (figure 2). Whereas in Germany four percent of the households experience deprivation and only one percent suffers from strong deprivation, the corresponding figures for Spain are twice as high. In Hungary almost every third household is subjected to deprivation, every sixth household undergoes strong deprivation. Due to the lower level of welfare achievement in Hungary in general socio-economic precariousness is quite common for a considerable number of people.

4.2 Social scepticism and social-psychological distress in Hungary, Spain, and Germany

In addition to the supply with basic goods and resources, the realisation or limitations of social participation are at the core of the social exclusion approach to analyse comprehensive disadvantages. Again, the *Euromodule* provides a variety of indicators suitable for the analysis of limited chances to participate in two perspectives: on the one hand symptoms of anomie and a generalised lack of trust in society are important indicators for revealing hints of detachment from a moral and social consensus of a given society. On the other hand weakened individual well-being can be measured with indicators of social-psychological distress, which restricts options and life chances to a large extent.

Table 3 provides an overview of percentages of the population affected by single dimensions of social scepticism and social-psychological distress. Differences between the three countries are not as clear as one could assume given information on exposure to deprivation within them. On the whole, general social scepticism is much more widespread in Hungary, especially where the legitimacy of incorrect or illegal behaviour is concerned. Three out of four Hungarians agree with the statement that you are nowadays forced to do incorrect things. Germans sympathize with this statement to a larger extent than the Spanish population. This is due to the great variance of agreement in

Table 3: Limited chances to participate: general social scepticism and social-psychological distress

| | Hungary | Spain | Germany |
|--|--------------------|-------|---------|
| | in % of population | | |
| General social scepticism | | | |
| Life has become so complicated, can't find my way ¹ | 31 | 21 | 17 |
| Nowadays you are forced to do incorrect things ¹ | 79 | 25 | 30 |
| Did not vote in last general parliamentary election | 20 | 24 | 16 |
| You can't be too careful in dealing with people | 78 | 69 | 67 |
| Social-psychological distress | | | |
| Usually unhappy or depressed | 22 | 17 | 10 |
| Frightening thoughts again and again | 11 | 13 | 17 |
| I often feel lonely | 23 | 26 | 14 |
| Pessimistic about the future | 23 | 29 | 36 |
| Low satisfaction with life in general ² | 17 | 6 | 5 |

¹ Answer categories "completely agree" and "somewhat agree" summarised.

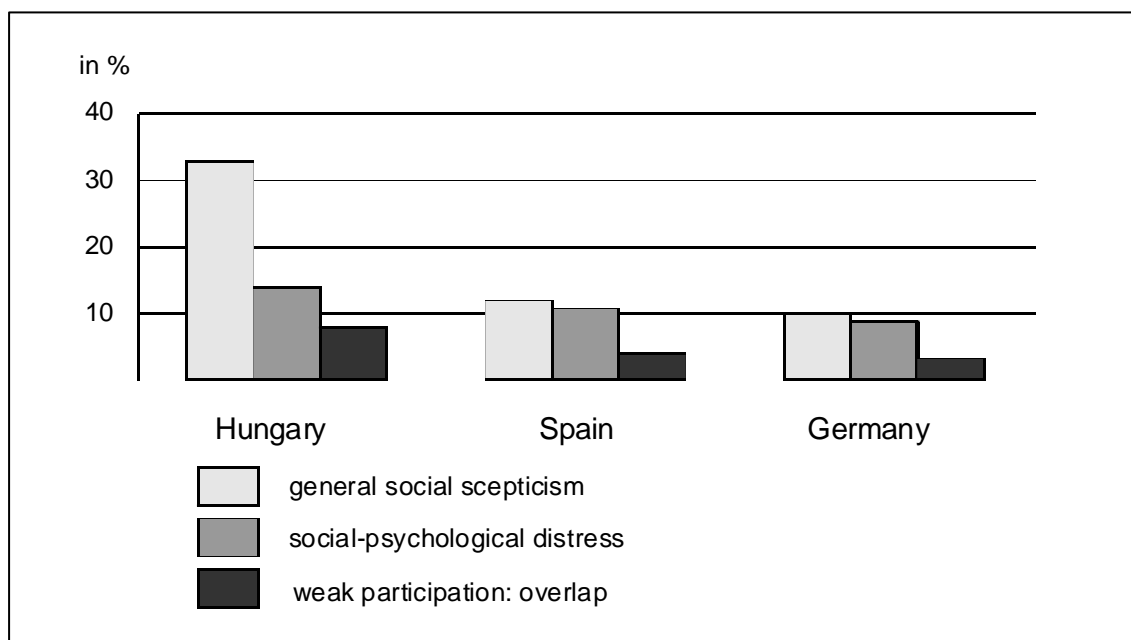
² Summing up 0-4 scores at a 0-10 satisfaction scale (0 = completely dissatisfied; 10 = completely satisfied); mean satisfaction with life in general in Hungary (6,2), in Spain (7,2), in Germany (7,6).

Source: Euromodule Germany (1999), Euromodule Hungary (1999), Euromodule Spain (2000).

East (44%) and West Germany (26%). Therefore, we can conclude that general social scepticism is especially high in connection with insecurity as a result of the transformation process and rapid social change.

On the contrary, subjective well-being does not follow one of these lines of argumentation that clearly. Depression and dissatisfaction with life in general is highest in Hungary, but all other indicators do not offer a clear distribution and country ranking. Pessimism about the future and suffering from frightening thoughts again and again even has highest percentages in Germany. Figure 3 summarises reduced social participation with an overview of the respective dimensions. With the exception of Hungary in the category of social scepticism, the overall impression is that profiles of reduced social participation are far less pronounced than differences in the exposure to precarious standard of living.

Figure 3: Limited chances to participate in Hungary, Spain and Germany



Notes: General social scepticism and social-psychological distress are both operationalised as an accumulation of being affected by three and more items in each domain (see table 3), weak participation refers to the overlap: limited chances to participate in both dimensions, general social scepticism AND social-psychological distress.
 N (Total) in Hungary: 1508; in Spain: 2489; in Germany: 2381.
Source: Euromodule Germany (1999), Euromodule Hungary (1999), Euromodule Spain (2000).

4.3 Marginalisation and exposure to social exclusion: country-specific determinants

According to the definition of social exclusion, one of the main criteria for setting vicious circles in motion is the coincidence of material deprivation and reduced social participation. What we know from the above-mentioned results is that the general level of reduced social participation does not mirror exposure to insufficient standard of living in country comparison. When focusing on the part of the population experiencing long-term unemployment (figure 4a) or multidimensional poverty (figure 4b) we see that not only the level of reduced social participation in general is considerably different, but that the effects of precarious living conditions differ as well between the three countries.

Figure 4a: The unemployed and their experience of reduced social participation¹

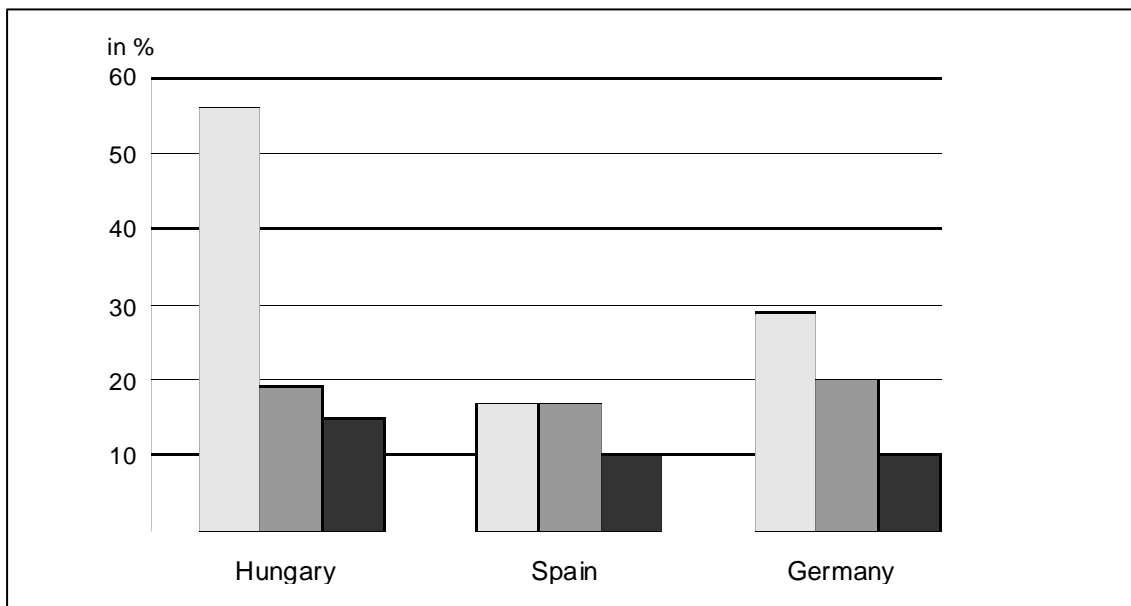
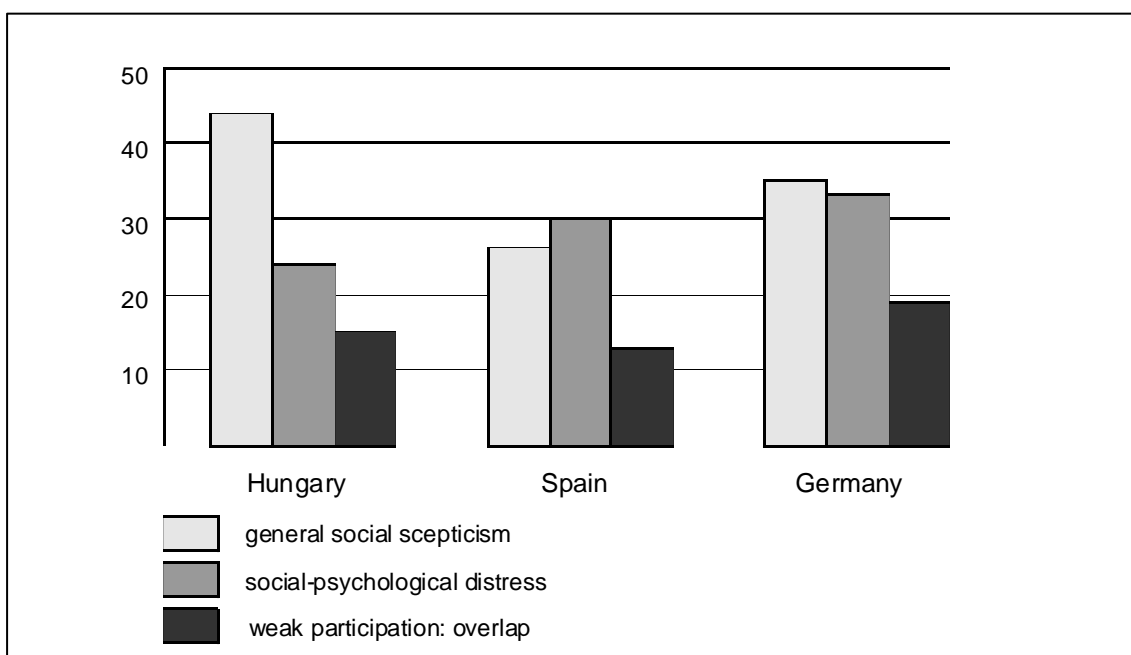


Figure 4b: The poor and their experience of reduced social participation²



Notes: General social scepticism and social-psychological distress are both operationalised as an accumulation of being affected by three and more items in each dimensions (see table 3), overlap means to experience such reduced social participation in both domains (general social scepticism and social psychological distress) at the same time.

¹ N (Unemployed) in Hungary: 92; in Spain: 194; in Germany: 105.

² N (Poor = deprived in the housing, consumption *and* income domain) in Hungary: 456; in Spain: 172; in Germany: 89.

Source: Euromodule Germany (1999), Euromodule Hungary (1999), Euromodule Spain (2000).

Whereas again Hungarians with precarious living conditions show the highest level of general social scepticism, social-psychological distress is most pronounced in Germany and of minor importance in Hungary. Slightly more than 30 percent of the population with an inadequate standard of living and 20 percent of long-term unemployed Germans face consequences on individual well-being such as depression or dissatisfaction. Obviously living in multidimensional poverty in Germany results in greater exposure to social-psychological distress or reduced social participation than in Hungary and especially than in Spain. The overall level of welfare achievement of the respective society might play an important role in this respect. The experience of long-term unemployment has the weakest effects for social participation in Spain with no difference between the societal and the individual level.

The crucial question is then, why do precarious living conditions have a more limited effect on social participation in Spain and Hungary than in Germany, a country with relatively generous benefits? There are two main possible explanations. First, the overall level of welfare and standard of living within one country might influence the evaluation of personal precariousness, i.e. getting unemployed is less of a personal failure if the general level of unemployment in a country is high, and the personal accountability for poverty is weaker when standard of living is low nation-wide. This kind of explanation focuses on processes of comparisons and claims, which are related to an average nation's welfare arrangement. Second, bearing in mind the specifics of the Spanish welfare mix, we can assume that support from social networks and family solidarity eases the burden of unemployment and poverty. Table 4 presents some empirical support for both assumptions.

Comparisons and claims are measured with a subjective evaluation of the respondent's living conditions by him- or herself compared to the living conditions in the neighbourhood, of friends and of living conditions the respondent thinks he or she is entitled to. Looking at the results, the assumption gets confirmed that differences between the whole population and those experiencing precarious living conditions are more obvious in Germany than in Hungary. Confrontation with better living conditions in the neighbourhood or in the circle of acquaintances may cause feelings of inferiority and personal failure. With the indicators at hand, the stronger social support for those in need in Spain and the weak social backing, especially in Germany, can be insinuated. Living alone is a characteristic of those exposed to precarious living conditions in Germany compared to the whole population. In Spain, percentages of

Table 4: Comparisons and social support: two explanations for the risk of social exclusion (column percentages)

| | Hungary | | Spain | | Germany | |
|--|------------------|------------------------------------|------------------|------------------------------------|------------------|------------------------------------|
| | Whole population | Living in precarious circumstances | Whole population | Living in precarious circumstances | Whole population | Living in precarious circumstances |
| Comparisons¹ | | | | | | |
| Living conditions in neighbourhood above respondent's | 37 | 55 | - | - | 25 | 59 |
| Living conditions of friends above respondent's | 31 | 63 | - | - | 27 | 57 |
| Respondent's living conditions below subjective entitlements | 88 | 98 | - | - | 42 | 77 |
| Social support | | | | | | |
| One person household | 14 | 12 | 7 | 4 | 16 | 25 |
| Married or living as couple | 64 | 61 | 64 | 62 | 71 | 61 |
| Big households: five person + | 10 | 17 | 19 | 27 | 17 | 13 |
| No membership in an organisation | 80 | 88 | 67 | 74 | 51 | 71 |

Notes: (-) no data available.

Living in precarious circumstances means experiencing multidimensional poverty and/or long-term unemployment.

¹ Respondents were asked to evaluate their own living conditions, the living conditions of their friends, in the neighbourhood and those they think themselves being entitled to with the help of a 0-10 scale (0 = very bad living conditions; 10 = very good living conditions); reading example: 37 percent of the Hungarian population say that the living conditions in their neighbourhood are better than their own living conditions, 42 percent of the German population say that their own living conditions are below those they think they are entitled to. Data source on these items for Germany: German Welfare Survey 1998. Source: Euromodule Germany (1999), Euromodule Hungary (1999), Euromodule Spain (2000).

one-person-household are generally small, and those living in precarious circumstances are more likely to be in shared households. This could be an explanation for their not falling into patterns of social exclusion. Unfortunately the data do not offer further information on the family background and social networks. At least, these results give us a hint that processes of comparisons are especially of importance when the general level of welfare is high in a country, and solidarity issues are more likely to happen when precariousness is a shared experience.

Finally, the main socio-demographic characteristics of those most likely exposed to social exclusion are compared. With the help of a logistic regression model we can argue that despite different levels of exposure in the three countries, perhaps the same determinants are crucial for running the risk of social exclusion. The logistic regression models include as a binary dependent variable the risk to experience social exclusion or not, which means running short of supplies of important goods and resources and being cut off from society in terms of weakened social participation at the same time. As explanatory variables, the models include household and family composition, level of education, labour market performance and the size of the region the household is located in, controlled by gender and age, which do not remain significant in any of the computed models. Table 5 shows $\exp(b)$ coefficients, which indicate the odds ratio of the risk to become socially excluded in relation to the reference category of each independent variable (DeMaris 1992, Norušis and SPSS inc. 1993, Kohler and Kreuter 2001).

Looking at the household composition as a determinant of the social exclusion risk, lone parenthood and not sharing a household with someone are particularly decisive in Germany, of a weaker influence in Hungary and have no explanatory value in Spain (table 5). In comparison to full-time employment, the highest risk for being left out of society is associated with denied access to the labour market, mostly in terms of long-term unemployment and permanent disability. Again, figures are highest for the German case indicating a considerable gap between “insiders” and “outsiders” which is more pronounced than in the other countries. Surprisingly, the size of the region has no significant influence anymore in the interplay with the other variables of this multivariate analysis. Instead, the level of education is particularly important in Hungary and Spain. Persons with only a low level of education are four times more likely to experience social exclusion than persons with a middle

Table 5: Determinants of the exposure to social exclusion in Hungary, Spain, and Germany.
Logistic regression models ($\exp(\beta)$).

| | Hungary | Spain | Germany |
|---|-----------|-----------|-----------|
| Household and family composition | | | |
| (ref. Cat.: 2 or more adults, no children) | 1,00 | 1,00 | 1,00 |
| 2 adults, one or two children | 1,22 | 0,90 | 1,52 |
| 2 adults, more than two children | 1,29 | 2,14* | 2,43* |
| One person household | 2,61* | 1,97 | 2,97** |
| One person household, widowed or divorced | 1,77* | 1,71 | 3,33*** |
| Lone parent | 5,68*** | 1,56 | 12,01*** |
| Labour market performance / alternative roles (full-time employment) | | | |
| Retired / early retirement | 1,47 | 1,15 | 0,95 |
| Permanently disabled | 4,69*** | 4,90*** | 7,90*** |
| School/university/retraining | 0,92 | 2,72* | 1,67 |
| Unemployed | 2,33 | 2,41 | 4,65* |
| Long-term unemployment | 3,09** | 3,80*** | 9,02*** |
| Other (on leave/homemaker/military/part time) | 1,90* | 2,21** | 1,07 |
| Size of Region (> 100 000) | | | |
| Middle size | 1,07 | 0,96 | 0,70 |
| < 10 000 ¹ | 1,27 | 0,98 | 0,76 |
| Level of education | | | |
| (middle level of education) | 1,00 | 1,00 | 1,00 |
| Low level | 2,10*** | 3,73*** | 1,79** |
| High level | 0,21** | 0,66 | 0,48 |
| -2LL for model containing only the constant | 1011,82 | 1382,83 | 1033,86 |
| -2LL for model with all independent variables | 903,54 | 1267,85 | 889,61 |
| Chi-Quadrat | 108,28*** | 114,98*** | 144,26*** |
| McFadden's R ² | 0,11 | 0,08 | 0,14 |
| N (total) | 1415 | 2407 | 2358 |

Notes: Significance level: * $p < 0.05$ ** $p < 0.01$ *** $p < 0.001$.

The binary dependant variable is a combination of experiencing multidimensional material deprivation (housing, standard of living, financial situation) and reduced social participation (general social scepticism and social-psychological distress); due to the generally lower level of welfare and living conditions in Hungary, the preconditions to belong to the category of "excluded" are more focused in the Hungarian case (two items in each material dimension instead of only one).

¹Smaller than 20 000 for the German case.

Source: Euromodule Germany (1999), Euromodule Hungary (1999), Euromodule Spain (2000).

level of education. This is particularly concerning in a country where large portions of the population belong in the first category. In Hungary a high level of education obviously limits the risk of marginalisation to a large extent. Unfortunately, other explanatory variables are not at hand. Particularly information on the actual or former labour market status position would presumably be of high value, the same applies to information on the duration of precarious living conditions. In the German case, experiencing consistently bad and precarious living conditions for a long period increases dramatically the likelihood of feeling left out of society (Böhnke 2001).

Conclusion: European social policy and national experiences of social exclusion

Speaking of social exclusion has advanced to a broad paraphrasing which covers a wide range of social problems and disadvantages. In the European context social exclusion is introduced as an umbrella concept to address multidimensional poverty and threats to social participation and social rights. Up to now, its main value was located on the political level by contributing to a notion of polarised societies in need of social changes and reforms of social protection systems. However, social scientists and empirical researchers have been less enthusiastic in using the term, instead, efforts have been undertaken on the theoretical as well as on the empirical level to strengthen the concept of social exclusion in its analytical value and to verify the hypothesised processes.

This paper contributes to the debate by discussing how social exclusion processes might be monitored. It begins by first coming up with a narrow definition to cut down the broad meaning of social exclusion, and indicators that could be used to measure the phenomena are proposed. Then, using data from the *Euromodule*-initiative, the exposure to social exclusion in Hungary, Spain, and Germany is compared with reference to welfare mix specifics.

Empirical research in quantitative and representative terms is hardly possible if we focus on the “excluded” in a true sense (i.e. homeless persons etc.). Instead, doing research on exposure to social exclusion in the poverty research tradition puts the focus on precarious living conditions in a multidimensional perspective and on related consequences of social participation. With *Euromodule*-data, the link between socio-economic precariousness and social participation can be analysed in an objective as well as in a subjective perspective. As the results show, deprivation in housing, basic consumption and financial resources is most prevalent in Hungary while the experience of disadvantage in the three life domains is far less frequent in Germany. The picture is different where lack of social participation is concerned. Differences between the countries are far less pronounced than their exposure to insufficient standard of living might suggest. Despite the relatively high level of the social benefit system in Germany precarious living conditions are most likely to coexist with limited social participation there.

Two explanations for this are proposed. First, the overall level of welfare achievement and connected processes of comparison seem to be decisive in explaining the individual social-psychological distress of those with material shortcomings. Second, family solidarity and social networks are providers of social support and these resources are more accessible in Spain. In comparison, long-term unemployed and severely poor Germans are most lacking in this kind of social support. However, general scepticism regarding society also rises with the exposure to precarious living conditions, but is highly connected with rapid social changes linked to political and economic transformation, as experienced in Hungary and East Germany. The socio-demographic characteristics of those experiencing material shortcomings and lack of social participation at the same time – which are most likely those to be experiencing forms of social exclusion – are quite similar in the three countries. They include long-term unemployment, low education level and severe health problems. Especially in the German case, single parenthood and persons who live alone as a result of widowhood or divorce are most likely to be socially isolated and lack access to material comforts.

It is not possible to accurately monitor social exclusion processes using existing data sets. In order to explore the complexity of the phenomenon, a representative survey instrument is needed, which adds longitudinal information and the subjective perception of social exclusion. Nevertheless, this

analysis is an example of the different outcomes material shortcomings have in countries with different welfare levels and different policy arrangements. When planning a European-wide social report on social exclusion, these huge differences in preconditions have to be taken into account. Social exclusion research in this perspective is confronted with the well-known problem of the relativity of disadvantages in a given national context. As a consequence, country specifics should also be taken into consideration in European-wide approaches to combat social exclusion.

Notes

- 1 See Charter of Fundamental Rights of the European Union, Nizza 2000, documented at www.europarl.eu.int/charter/pdf/text_en.pdf (02/10/2001), find information on the Amsterdam treaty at <http://europa.eu.int/abc/obj/amst/en/> (02/10/01) and about the European Social Policy Agenda http://europa.eu.int/comm/employment_social/general/com00-379/com379_en.pdf (02/10/01).
- 2 For action plans of all European member state see: http://europa.eu.int/comm/employment_social/news/2001/jun/napsincl2001_en.html (02/10/01).
- 3 http://www.gegis.org/en/social_monitoring/social_indicators/EU_Reporting/eusi.htm (02/10/01).
- 4 Publications and information on this subject are to be found here: www.feantsa.org.

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