

## EU

### European Union

#### Economic and Social Inequality Within the EU

##### Overview

In recent years, inequality has become one of the main concerns for citizens of the European Union.<sup>1</sup> This complex phenomenon, which includes both social and economic factors affect a wide variety of groups, including women, migrants and the young, is increasing in the EU, with over 80% of citizens saying that inequality is too high and that their governments should be taking steps to lower it. This follows general worldwide trends of globalization, increased automation and a decay of progressive taxation. While individual sovereign nations are currently undertaking steps independently, questions remain about the efficacy of these efforts in ensuring equality not only between Europeans but also between EU member states. In alignment with its goal of ensuring an equal Europe for all, the EU seeks to resolve the rampant economic and social inequality currently plaguing itself.

##### The European Union

Founded in 1993 as the successor to several postwar European international institutions, the European Union, or colloquially the EU, is a grouping of 27 member states from all corners of the European continent.<sup>2</sup> Unlike most international organizations, the EU is an economic and political union that possesses legal and sovereign power within the nations that compose it. The European Union's stated aims are to promote peace and internal security, to create a strong internal market (the Eurozone), to combat discrimination and respect diversity, and to aid the development of science and the environment.<sup>3</sup>

One way the European Union combats inequality is through its *European Pillar of Social Rights Action Plan*, which seeks to achieve certain targets by 2030. As the European Union

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<sup>1</sup> "Addressing economic inequalities," European Commission, accessed Nov. 2, 2023, <https://ec.europa.eu/social/main.jsp?catId=1593&langId=en>.

<sup>2</sup> Matthew J. Gabel, "European Union," Encyclopedia Britannica, accessed Aug. 6, 2023, <https://www.britannica.com/topic/European-Union>.

<sup>3</sup> "Aims and values," European Union, accessed Aug. 6, 2023, [https://european-union.europa.eu/principles-countries-history/principles-and-values/aims-and-values\\_en](https://european-union.europa.eu/principles-countries-history/principles-and-values/aims-and-values_en).

continues to deal with the consequences of inequality, it gives the floor to its individual member states to come to a compromise on how to deal with the issue as efficiently as possible.

### **Contributing Factors to Economic Inequality**

Economic inequality, or income inequality, is defined as the unequal distribution of income and opportunity between different groups in society.<sup>4</sup> As such, it is intrinsically tied to social inequality and the two are often grouped together. Economic inequality is currently on the rise in the European Union.<sup>5</sup> To understand socioeconomic inequality, one must know the factors that play into the widening of income gaps between disparate societal groups. In Europe, these consist primarily of disproportionate taxation policies, globalization and shifts in the labour market.

#### *Taxation*

Poorly implemented taxation policies are among the major drivers of economic inequality.<sup>6</sup> Since the end of the Second World War, taxation policies in developed countries, including those in Europe, have become less and less progressive. A progressive taxation system is one in which the tax rate increases as one's taxable income increases.<sup>7</sup> Such a system considers income in brackets; those in the highest tax bracket are ideally taxed the most. However, due to the decay of progressive taxation systems, the top earners of society today pay a lower rate of income tax than ever before, leading to the ballooning of their fortunes. In spite of this, studies have shown that the implementation of progressive taxation systems in conjunction with strong social services can reduce income inequality substantially. In particular, a study found that in 19 different European countries, inequality (as measured by the Gini coefficient) decreased by up to 6% after progressive taxation was strengthened.<sup>8</sup>

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<sup>4</sup> "What is economic inequality?" World of Labor, IZA - Institute of Labor Economics, accessed Oct. 27, 2023, <https://wol.iza.org/key-topics/economic-inequality>.

<sup>5</sup> "Inequality," European Foundation for the Improvement of Living and Working Conditions, Jan. 23, 2023, <https://www.eurofound.europa.eu/en/topic/inequality>.

<sup>6</sup> Anjali Bhatt, Melina Kolb, Oliver Ward, "How to Fix Economic Inequality? An Overview of Policies for the United States and Other High-Income Economies," Peterson Institute for International Economics, Dec. 17, 2020, <https://www.piie.com/microsites/how-fix-economic-inequality>.

<sup>7</sup> Julia Kagan, "What Is a Progressive Tax? Advantages and Disadvantages," Investopedia, Nov. 29, 2023, <https://www.investopedia.com/terms/p/progressivetax.asp>.

<sup>8</sup> Alari Paulus et al., *Figure 5: Redistributive effect of tax-benefit instruments, absolute change in the Gini coefficient*, Apr. 2009, graph, Euromod, <https://www.iser.essex.ac.uk/wp-content/uploads/files/working-papers/euromod/em8-09.pdf>.

### *Globalization*

The exportation of jobs to other countries is a driver of income inequality. This is due to the types of jobs that are being displaced and the skill level needed to perform them. With the world becoming more integrated, it has now become affordable for businesses in developed countries, such as European ones, to recruit labour from developing countries in Asia, Africa and Latin America, where low-skill employee wages are much lower.<sup>9</sup> This has led to the siphoning of low-skill jobs from Europe into developing countries. While globalization decreases inequality between countries, it also contributes to domestic income inequality, a decline in wages and an increase in unemployment within developed countries.<sup>10</sup> A solution to economic inequality in Europe will have to strike a careful balance between these factors.

### *Labour Market Shifts*

Ongoing shifts in the European labour market have also driven income inequality, mainly in the form of a decrease in low-skill jobs. One of these shifts is the rise of automation. In sectors such as manufacturing, “labour-saving” technologies have been shown to contribute to a decline in low-skill labour, due not only to their ability to substitute low-skill workers but also their need for maintenance by high-skill workers<sup>11</sup>, engendering both demand for high-skill labour and exaggerated income differences.<sup>12</sup> For example, a study showed that from 2006 to 2018, reductions in hourly wages and employment of marginalized groups coincided with increases in workplace automation.<sup>13</sup> In fact, automation and globalization<sup>14</sup> are merely components of a larger job shift from manufacturing to services that is exacerbating economic inequality. For

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<sup>9</sup> Hannah W. Jacobs, “Cheap Foreign Labor Costs in the Context of Globalization: Perspective from the United States of America,” *Journal of Economics* 5, no. 1 (2021): 29-40,

<https://stratfordjournals.org/journals/index.php/journal-of-economics/article/view/837>.

<sup>10</sup> Zia Qureshi, “Rising inequality: A major issue of our time,” Brookings Institution, May 16, 2023,

<https://www.brookings.edu/articles/rising-inequality-a-major-issue-of-our-time/>.

<sup>11</sup> Era Dabla-Norris et al., “Causes and Consequences of Income Inequality: A Global Perspective,” International Monetary Fund, June 2015, <https://www.imf.org/external/pubs/ft/sdn/2015/sdn1513.pdf>.

<sup>12</sup> “How technology and globalisation are transforming the labour market,” OECD iLibrary, Organisation for Economic Co-operation and Development, Jun. 13, 2017,

[https://www.oecd-ilibrary.org/sites/empl\\_outlook-2017-7-en/index.html?itemId=/content/component/empl\\_outlook-2017-7-en](https://www.oecd-ilibrary.org/sites/empl_outlook-2017-7-en/index.html?itemId=/content/component/empl_outlook-2017-7-en).

<sup>13</sup> Karina Dooley et al., “Automation and Income Inequality in Europe.” SocArXiv, Oct. 2023, doi:10.31235/osf.io/kdz5e.

<sup>14</sup> Giuseppe Berlingieri, “Outsourcing and the shift from manufacturing to services,” Centre for Economic Policy Research, Sep. 25, 2014,

<https://cepr.org/voxeu/columns/outsourcing-and-shift-manufacturing-services>.

example, in Spain and the United Kingdom, a long decline in middle-class manufacturing jobs took place during the late 2000s, with only the highest and lowest-paying jobs left untouched, a phenomenon known as polarization.<sup>15</sup>

### **Contributing Factors to Social Inequality**

Social inequality is similar but different from economic inequality, and the two are linked. Social inequality is a condition in which different identity groups have unequal amounts of income, prestige, or power.<sup>16</sup> Social inequality has risen in the past decade in Europe. If left unmitigated, inequality between classes, genders, races, ethnicities, and other identities can reduce social mobility, fuel instability within states, lessen cohesion between identity groups and even result in reduced physical health among the general population.<sup>17</sup> In this section, four different cases will be briefly looked at: the gender pay gap, the generational divide, immigrants, and the Romani people.

#### *The Gender Pay Gap*

Social inequality between men and women in the workplace is fueled primarily by two factors: the labour market and salaries.<sup>18</sup> Firstly, women are less employed than men. Although this trend has halved in the EU in the 21<sup>st</sup> century, it nevertheless persists. In 2014, the gap in employment was estimated to be 10%. Secondly, due to women being more likely to be employed in lower-paid occupations, a wage gap still exists between men and women, although it too has narrowed over time. When comparing full-time employees (to account for job disparities) from both genders in 2014, women were found to earn 13% less than men.

#### *Generational Differences*

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<sup>15</sup> Daniel Vaughn-Whitehead, Rosalia Vazquez-Alvarez and Nicolas Maître, *Europe's Disappearing Middle Class? Evidence from the World of Work* (Geneva: Elgar, 2016), 8, [https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/documents/publication/wcms\\_630642.pdf](https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/documents/publication/wcms_630642.pdf)

<sup>16</sup> "Social inequality," Oxford Reference, Oxford University Press, accessed Oct. 13, 2023, <https://www.oxfordreference.com/display/10.1093/oi/authority.20110803100515195>.

<sup>17</sup> "Understanding the socio-economic divide in Europe," Organisation for Economic Co-operation and Development, Jan. 26, 2017, <https://www.oecd.org/els/soc/cope-divide-europe-2017-background-report.pdf>.

<sup>18</sup> "Understanding the socio-economic divide in Europe."

Social inequality between generations is a growing problem in Europe.<sup>19</sup> Overall trends are in the direction of increasing youth inequality and youth poverty while more and more government spending is directed towards Europe's pensioners, a segment of the population that continues to swell. As a whole, Europe's youth are becoming significantly poorer, with youth unemployment rapidly increasing in the 21<sup>st</sup> century. More and more youth are winding up in the category of NEET, or "not in employment, education, or training", where zero income or intellectual capital that can be invested towards income is being earned. What makes this form of social inequality especially dangerous is its pervasiveness and consequences. That is, generational inequality affects youth of all genders and colours, and has a lasting effect on its victims, permanently reducing their productivity, employability and even fertility (due to income uncertainty).

### *Immigrants and Other Non-Nationals*

Another identity group that suffers from systemic social inequality is non-nationals, especially migrants. This is important because 23.8 million residents of the EU are not citizens of the Union, and millions of new immigrants arrive every year.<sup>20</sup> Despite this, the EU still seeks to care for the welfare of all of its residents. Unfortunately, the statistics show that the gap in social well-being between EU nationals and non-nationals is very pronounced: while only 19.3% of EU nationals are at risk of poverty, as of 2021, 46.2% of citizens of non-EU countries that live in the European Union (a category that includes nearly all migrants) are victims of social inequality.<sup>21</sup> With immigration an increasing source of population growth in many European countries, diminishing inequality and, through it, ensuring social cohesion between migrants and nationals has become more important than ever. The main ideas behind solutions to this problem include ensuring decent housing, healthcare and employment for migrants. The eventual goal is for migrants to sustain their own lifestyle from their employment.<sup>22</sup>

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<sup>19</sup> Pia Hüttl, Karen Wilson and Guntram Wolff, "The growing intergenerational divide in Europe," Enconstor, Bruegel, Nov. 2015, <https://www.econstor.eu/bitstream/10419/126683/1/841190194.pdf>.

<sup>20</sup> "Migration and migrant population statistics," Eurostat, European Commission, Mar. 2023, [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Migration\\_and\\_migrant\\_population\\_statistics](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Migration_and_migrant_population_statistics).

<sup>21</sup> "Migrant integration statistics - at risk of poverty and social exclusion," Eurostat, European Commission, Oct. 23, 2023, [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Migrant\\_integration\\_statistics\\_-\\_at\\_risk\\_of\\_poverty\\_and\\_social\\_exclusion](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Migrant_integration_statistics_-_at_risk_of_poverty_and_social_exclusion).

<sup>22</sup> "Living conditions of immigrants," OECD iLibrary, Organisation for Economic Co-operation and Development, Jan. 17, 2019,

## Regional Economic Disparities

Just as there exists inequality between individuals, leading to a lack of cohesion in society, there also exists inequality between states, leading to a lack of cohesion in the European Union.

### *Ruins of the Iron Curtain*

Although the former Warsaw Pact has moved away from Marxism-Leninism, the shadow of communism still looms large over the region. While the EU, which is largely coterminous with the Schengen Area, largely benefits from freedom of movement across countries, certain regions face a shrinking working population as people move to countries with higher standards of living.<sup>23</sup> This effect, known as “brain drain”, is most intense in Southern and Eastern Europe. Various direct causes of brain drain include both push factors, such as structural youth unemployment, underfunded education systems and political instability, and pull factors such as access to healthcare and better job opportunities. In Romania, poor education has contributed to its status as an EU member with the lowest number of researchers per capita. Meanwhile, in Greece, the financial crisis and corruption have made it difficult for the nation to retain and attract highly skilled workers.<sup>24</sup>

### *Two-Speed Europe*

A proposed solution to the above problem is “differentiated integration”, where countries integrate into the EU at different rates. This would likely involve the creation of new organizations that move the Inner Six (France, Germany, Netherlands, Belgium, Italy and Luxembourg) towards federalization while the Eastern European countries integrate properly into the EU.<sup>25</sup> Critics, among them the governments of 13 member states, have lambasted this

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[https://www.oecd-ilibrary.org/sites/empl\\_outlook-2017-7-en/index.html?itemId=/content/component/empl\\_outlook-2017-7-en](https://www.oecd-ilibrary.org/sites/empl_outlook-2017-7-en/index.html?itemId=/content/component/empl_outlook-2017-7-en).

<sup>23</sup> “Europe seeks to tackle ‘brain drain’ of young people from hard-hit regions,” European Commission, Oct. 5, 2022, <https://ec.europa.eu/social/main.jsp?catId=1593&langId=en>.

<sup>24</sup> “From brain drain to brain circulation,” European Union, Nov. 15, 2023, <https://op.europa.eu/en/publication-detail/-/publication/9e39b4bd-843c-11ee-99ba-01aa75ed71a1/language-e-en>.

<sup>25</sup> Christopher Pitchers, “What do we know about Macron’s idea for a two-speed Europe?” Euronews, May 11, 2022, <https://www.euronews.com/my-europe/2022/05/11/what-do-we-know-about-macron-s-idea-for-a-two-tier-europe>.

idea, claiming that it is unfair to focus on the integration of the wealthy Inner Six when negotiations with EU candidate states in the Balkans have been stalling for years.

### **Welfare Systems and Socioeconomic Inequality**

One of the primary mechanisms by which states attempt to resolve economic inequality is by instituting welfare systems. In short, a welfare system applies public money towards helping people in need.<sup>26</sup> Social programs are the individual aspects of a welfare system and include public healthcare, public education, food stamps, unemployment compensation, housing assistance and more. In order to more thoroughly examine the pros and cons of these often complex systems, two examples of sustained welfare-related government policy are shown below.

#### *Effects of Neoliberalism in the US*

In the United States, social programs have not been a priority since the rise of neoliberalism in the mid-1970s. Cutting back on welfare programs has led to the United States becoming one of the lowest-taxed nations in the developed world,<sup>27</sup> with its tax-to-GDP ratio being 8 points lower than the OECD average. However, in terms of socioeconomic inequality, the effects have mostly been adverse: from 1967 to 2012 the share of income owned by the top five percent of earners increased from 43.6% to 51%. In addition, racial disparities are widening in the U.S., with over three-quarters of top earners being non-Hispanic whites while only 9.7% lived in poverty.<sup>28</sup> More long-term impacts of cutting health and education programs include a lack of social cohesion, a higher prevalence of health issues among the population and the world's greatest inequality gap. Overall, it can be seen that rolling back welfare programs on large scales increases socioeconomic inequality.

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<sup>26</sup> Kagan, Julia. "Social Welfare System." Investopedia, Jun. 1, 2021.  
<https://www.investopedia.com/terms/s/social-welfare-system.asp>.

<sup>27</sup> "Is the U.S. the Highest Taxed Nation in the World?" Committee for a Responsible Federal Budget, Jul. 22, 2016, <https://www.crfb.org/blogs/us-highest-taxed-nation-world>.

<sup>28</sup> Mimi Abramowitz, *Global Social Work: Crossing Borders, Blurring Boundaries*, eds. Carolyn Noble, Helle Strauss and Brian Littlechild (Sydney: Sydney University Press, 2014), 231.  
<https://www.jstor.org/stable/j.ctv1fxm2q.20?seq=7>

### *Welfare in the Nordic Countries: A Band-Aid Solution?*

The United States stands in stark contrast to the Nordic countries, where ‘welfare state’ famously remains an adequate descriptor even in the 21<sup>st</sup> century. In these countries, the Nordic model serves as a standard for policies, merging free-market capitalism with a generous welfare system.<sup>29</sup> The results, on the surface, seem to be almost completely beneficial: social mobility is increased, socioeconomic inequality plummets and the average citizen’s quality of life is augmented tremendously. However, there are still concerns regarding the sustainability of such a system. An aging population in Nordic countries (which is a common issue in most European countries<sup>30</sup>) and a large influx of poor immigrants ensure that a larger economic burden will be placed on younger cohorts of the population, meaning that austerity may be inevitable. However, it seems that this may be solvable through the increased social cohesion that social equality engenders.

### **Past Agreements on European Socioeconomic Inequality**

#### *Maastricht Treaty (1992)*

Although not focusing directly on socioeconomic inequality, the document that formed the European Union is still important. In Article 9, the *Treaty on European Union*, also known as the *Maastricht Treaty*, sets out that “in all its activities, the Union shall observe the principle of the equality of its citizens, who shall receive equal attention from its institutions, bodies, offices and agencies.”<sup>31</sup> Ever since then, attaining a state of equality within Europe has been one of the EU’s top priorities.

#### *Amsterdam Treaty (1997)*

The *Amsterdam Treaty* of 1997 contains one of the first references to resolving inequality in an EU document. This treaty, an amendment to the Maastricht Treaty, states that “...the [European Union] shall support and complement the activities of the Member States in...the integration of persons excluded from the labour market, [and creating] equality between men and women with regard to labour market opportunities and treatment at work.”<sup>32</sup> The treaty states

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<sup>29</sup> James McWhinney, “What Is a Progressive Tax? Advantages and Disadvantages,” Investopedia, Oct. 2, 2023, <https://www.investopedia.com/articles/investing/100714/nordic-model-pros-and-cons.asp>.

<sup>30</sup> Hüttl, Wilson and Wolff, “The growing intergenerational divide in Europe.”

<sup>31</sup> Treaty on European Union, July 29, 1992, 11992M, art. 9.

<sup>32</sup> Treaty of Amsterdam amending the Treaty on European Union, the Treaties establishing the European Communities and certain related acts, Nov. 10, 1997, 11997D, art. 188.



that, to this end, the European Council may institute binding minimum equality requirements in various member states.

### *Europe 2020 Strategy (2010)*

The EU's policy strategy document *Europe 2020 Strategy* discusses resolving inequality in an EU that is much larger than that of the 1990s. One of the key priorities set by this strategy is “inclusive growth”—that is, building a cohesive society by employing social protection systems and high employment, among other measures. Several forms of social inequality are explicitly mentioned: “A major effort will be needed to combat poverty and social exclusion and reduce health inequalities to ensure that everybody can benefit from growth. Equally important will be our ability to meet the challenge of promoting a healthy and active aging population to allow for social cohesion and higher productivity.”<sup>33</sup> As seen in the passage, the EU has recognized for a while that manifold forms of social inequality are rising within the Union.

### *European Pillar of Social Rights (2017)*

The *European Pillar of Social Rights* is the EU's current guiding light for dealing with social inequality and is their largest initiative solely focused on such to date. The 20 pillars of the EPSR contain targets for achieving a wide range of equal outcomes, including gender equality, equal employment opportunities, inclusion of people with disabilities, affordable healthcare and a robust social welfare system.<sup>34</sup> These targets have been turned into concrete goals by the EPSR Action Plan, which seeks to raise employment and reduce poverty substantially by 2030.<sup>35</sup>

## **Questions to Consider**

1. How pronounced is socioeconomic inequality in your country?
2. How might the demographic composition of your country play into its current socioeconomic situation?

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<sup>33</sup> European Commission, *Europe 2020 Strategy*, March 3, 2010, 16, <https://ec.europa.eu/eu2020/pdf/COMPLET%20EN%20BARROSO%20%20%20007%20-%20Europe%202020%20-%20EN%20version.pdf>.

<sup>34</sup> “The European Pillar of Social Rights in 20 principles,” European Commission, accessed Nov. 13, 2023, <https://ec.europa.eu/social/main.jsp?catId=1606&langId=en>.

<sup>35</sup> “The European Pillar of Social Rights Action Plan,” European Commission, accessed Nov. 13, 2023, <https://ec.europa.eu/social/main.jsp?catId=1607&langId=en>.

3. Was your country in the Western or Eastern Bloc during the Cold War? How might this have affected its current integration in the EU and its economic equality?
4. How might factors such as globalization, evolving technology and diversification affect social equality in your country's future?
5. Has your country's government released any policies or enacted any laws to counteract economic inequality?

**Useful Delegate Resources**

[https://european-union.europa.eu/index\\_en](https://european-union.europa.eu/index_en)

[https://commission.europa.eu/index\\_en](https://commission.europa.eu/index_en)

<https://ec.europa.eu/eurostat>

<https://ec.europa.eu/social/main.jsp?catId=1606&langId=en>

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Budget, Jul. 22, 2016. <https://www.crfb.org/blogs/us-highest-taxed-nation-world>.

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[https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Migration\\_and\\_migrant\\_population\\_statistics](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Migration_and_migrant_population_statistics).

Paulus, Alari, Mitja Čok, Francesco Figari, Péter Hegedüs, Nataša Kump, Orsolya Lelkes, Horacio Levy, Christine Lietz, Silja Lüpsik, Daniela Mantovani et al. *Figure 5:*

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