

## Quality of Life and Social Quality: Recent Developments

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working paper



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## **Preface**

Complementary to the work of its National Experts within the scope of focus monitoring, the *European Observatory on the Social Situation, Demography and Family* carried out an Internet search project on the subjects of *quality of life* and *social quality*, with a view to obtaining relevant information for the EU and the National Experts.

The following working paper investigates the use of the two concepts, both from a scientific perspective and from the European Union's point of view. Information sources are English and German-language scientific publications, EU documents and other associated information (e.g. from NGOs) obtained from the Internet. Accordingly, the large number of sources published on the subject in book form is not included in this paper.

## **1 QUALITY OF LIFE**

Depending on the methodological approach, *quality of life* is understood to mean the objective and/or subjective life situation of individuals and groups. Even though a multitude of definitions can be found, we use those developed by Noll and Zapf (see the Section on "Definitions" below). Whereas scientists have studied the subject for decades, it is only now emerging as a relevant topic within the framework of the EU. Moreover, it is discussed at a very general level, e.g. in connection with vague and generalised recommendations ("the quality of life of EU citizens needs to be improved" or similar). Relevant aspects and options to operationalise the concept are hardly ever pursued down to any detail.

### **1.1 Scientific context**

Sources of information used for the purpose were publications, grey literature, articles in scientific magazines and information on scientific institutions. Where such information concerned or was published by the European Union, it was assigned to Section 1.2, "EU context".

As indicated later, *quality of life* is a concept that covers considerable ground and is never clearly defined. Both the context of its use and its meanings vary in the various descriptions. For this reason, the search effort was not limited to the term *per se*, but also included synonyms (e.g. living standards) and scientific disciplines (e.g. economics).

In the 1960s, the general public and governments began to take an interest in the subject, even though the initial focus was primarily on economic indices (mainly GDP), before attention began to turn to social indicators later in the decade. These have since driven *quality-of-life* research, evaluation research and efforts to analyse social change, with contributors beginning to differentiate between objective factors controlling conditions of living on the one hand, and subjective well-being on the other.

### 1.1.1 Definitions

A search of the Internet yields plenty of definitions for the *quality of life* concept, based on different approaches, which again range from the very narrow to the very broad. Below, we quote two scientists who start out from a highly comprehensive definition. In his writings, Noll delimits the term against terms such as affluence, standard of living and well-being which, in his opinion, have a narrower meaning.

Like affluence, quality of life can be considered an element or variant of the wider concept of welfare. The different variants differ in what they understand and emphasise to be a 'good life' and in the components covered [...]; quality of life on the other hand is a multidimensional concept which simultaneously includes tangible as well intangible, objective and subjective, individual and collective welfare components and which emphasises the 'better' over the 'more'. (Noll, 1999, p. 3).

Zapf similarly stresses the multidimensional character of the concept, describing its individual components as follows:

... The quality of life of individuals and groups [is] determined by the constellation (level, dispersion and correlation) of individual conditions of life and the components of subjective well-being. The conditions of life include, on the one hand, the dimension of security needs ('having') such as income, education, health, accommodation and work, and, on the other hand, the dimension of social needs ('loving') such as family ties, social contacts and social and political participation. Subjective well-being means the assessment, by the individual, of specific conditions of life and life in general. These include hope, fear, happiness, loneliness, competences, insecurity and worries. Together these are the components of quality of life or individual welfare. (Zapf, 1987, p. 47).

As mentioned in the above quotations, terms and concepts are found which have a similar meaning or which describe aspects or elements that make up *quality of life*. What is more, the term is not applied uniformly by all scientific disciplines. Synonyms and their respective context are listed below:

- *Quality of life: objective facts*
  - research into indices (e.g. household income, home size),
  - medical context (e.g. *quality of life* that can be enjoyed by diabetics, compliance),

- spatial factors (e.g. city quarter, hospital).
- *Well-being and satisfaction: subjective experience*
  - by the family – in the family – in a relationship,
  - emotions, ties,
  - separate from physical integrity and social context,
  - satisfaction: used generally, spanning all facets of life,
  - cognition – reflection.
- *Welfare*
  - general welfare (state and economic levels),
  - individual welfare (corresponds to *quality of life*).

The term *quality of life* has entered and is used in a number of scientific disciplines:

- *medicine*: physical, mental and social well-being (= WHO definition of health),
- *psychology*: absence of burdens, positive affective balance, prerequisite for a trend towards self-actualisation, ability to feel happy, result of complex individual assessment and evaluation processes,
- *philosophy*: ‘happiness from outside’ vs. ‘happiness from inside’ debate (Aristotle),
- *sociology*: description of situations of and satisfaction with life, welfare and indicator research,
- *economics*: general welfare and individual welfare.

Reflecting the different uses of the term by the various disciplines, *quality of life* is also subject to different understandings which vary by countries and cultures. With the Internet search restricted to information available in the German and English languages, the country-specific descriptions are similarly limited to Europe, the US and Canada, incidentally the countries where the discussion of the concept appears to be raging with the greatest intensity.

In Europe, *quality of life* includes all sectors (medicine, education, interdisciplinary studies, etc.). The term is operationalised by objective as well as subjective indicators. In the United States, *quality of life* is used primarily in medicine, commerce and agriculture, and described by objective indicators. The European understanding of *quality of life* (which

combines objective and subjective indicators) is known as ‘well-being’. In Canada, the term is used almost exclusively by the medical sector, and operationalised on the basis of both objective and subjective indicators.

### 1.1.2 Measuring the *quality of life*

- Rates of dispersion (usually Gini coefficient): aggregating a population’s *quality of life*.
- *Quality of life* is no static measure but depends on a variety of continuously changing conditions. In turn, this leads to measuring changes.
- Situational and individual context: measuring the *quality of life* includes an overall measure of the scope to which needs are satisfied and their evaluation in relation to an individual’s other needs and plans. Elements vary at different rates and intensities over time.
- Data collection methods: questionnaires, structured interviews, self-rating and third-party rating.

### 1.1.3 Conclusion

The Internet search results can be summarised as having yielded no uniform definition for *quality of life*. Definitions depend on the question, order of preferences, value judgements and approach chosen (objective or subjective measuring). Seen in this way, *quality of life* is a very wide term that can include the most varying dimensions and aspects depending on the approach that is used.

## 1.2 EU context – political understanding

The research projects and publications on the *quality of life* concept are mainly concerned with the following subjects<sup>1</sup>:

- work,
- the social situation in the European Union,
- old and disabled people,

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<sup>1</sup> Listed according to the frequency of their being mentioned in connection with quality of life/social quality and living arrangements.

- Fifth Framework Programme for Research,
- information technology (IT),
- environment.

### 1.2.1 *Quality of life and work*

*Quality of life* is dealt with in greater detail in the work context, a feature inherent in the system since the EU can neither impact on the individual, subjective level nor on family and leisure-time matters.

On 20 June 2001, the European Commission adopted a report which deals with labour and living standards. To this end, benchmarks were developed which are to be adopted at the Council meeting in Laeken in December 2001. The benchmarking is based on quality indicators for jobs, labour markets and social policies.

By promoting higher quality objectives, and by investing in better quality policies, the Commission aims to encourage and assist the Member States to improve the pace at which the quality of life is improved within the Union, inside and outside of work, and to provide appropriate aspirations for candidate countries. The Commission first looks at the relationship between quality of work and the modernisation of the European social model. It then considers how to define quality and goes on to consider the development of indicators of quality in work. It finally looks at applying and using these definitions and indicators through a process of quality reviews. (Commission of the European Communities, 2001, pp. 4–5)

The *Treaty of Amsterdam* (in its Article 2) and the *Social Policy Agenda 2000* (for both see Section 2.2) both elaborate on an improvement of living standards and the *quality of life* for EU citizens, and explicitly set them as goals defined by the Commission.

### 1.2.2 *Quality of life and the report on The Social Situation in the European Union 2001 (2001a)*

Even though the Report deals primarily with *social quality*, it still touches upon the *quality of life*. It makes provisions for monitoring different social developments across Member States and assessing their impact on the European citizens' *quality of life*.

A widespread consensus exists on the fact that the strengthening of the European economy and its social model will result from policies promoting synergy and positive interaction between economic growth, employment and social cohesion ... The Report will contribute to such an improved comprehension of the multiple dimensions of living standards of European citizens. (European Commission, 2001b, p. 6)

The report provides a more in-depth discussion of the *quality of life* issue in its section on



living conditions, which deals exhaustively (compared to all other current EU publications and discussions) with family life, housing, health, education and security.

### **1.2.3 *Quality of life and old or disabled people***

The EU is also more detailed in its *quality of life* treatment when it comes to disabled people or the situation of the elderly. The latter needs to be viewed chiefly in connection with the demographic ageing of the population in the EU Member States.

### **1.2.4 *Quality of life and the EC's Fifth Framework Programme for Research***

*(Improving the human research potential and the socio-economic knowledge base programme)*

'*Quality of life* and management of living resources' is one of the four thematic programmes of the *Fifth Framework Programme* (1998–2002) of the European Commission, and it has three key aims. The first is to help individual researchers to join research teams and use research facilities in other European countries. The programme's second objective is to promote the public image of science and technology and to encourage the very best scientists to take up work at a European level. Finally, the programme is helping to make science relevant to Europe's social problems, such as unemployment, inequality, global competitiveness, sustainable development and *quality of life*. The programme is primarily built around six specific key actions that are oriented towards goals and problem-solving. The six key actions are:

- 1) food, nutrition and health,
- 2) control of infectious diseases,
- 3) the 'cell factory',
- 4) environment and health,
- 5) sustainable agriculture, fisheries and forestry and integrated development of rural areas including mountain areas,
- 6) the ageing population and disabilities.

*Quality of life* therefore is mainly viewed from the aspects of biotechnologies, genoms, environment, disabilities and diseases.

### 1.2.5 *Quality of life and information technology (IT)*

In September 2000, the *Public Strategies for the Information Society in the Member States of the European Union* were published. The latest publication concerning *quality of life* and IT is a report on *The Social Situation in the European Union (2001)*.

Among the topics dealt with in these reports is the information society. Several countries see knowledge, (international) competitiveness and interaction, the development of IT and infrastructure as factors relevant for the *quality of life*. For them, *quality of life* can be improved by an increased use of information technologies.

Specifically, it is recognised that the pace of technology deployment in society has been revolutionised by the advent of the Internet and the new economy that is developing in its wake places the EU investment in a wholly different context. There is no debating that competitiveness will be fundamentally determined by education standards in the new technologies and that governments should underpin the acquisition of these competencies. This will be a determinant of citizen 'quality of life' as well as economic sustainability. (Pompidou et al., 2000, p. 1).

### 1.2.6 *Quality of life and environment/medicine*

The EU also refers to *quality of life* in connection with environmental issues, in its dealings with the following subjects: biotechnology, genetic research, noise and air pollution, etc. (cf. i.a. Eurobarometer 52.1, 2000 & European Commission, 2000b).

## 2 SOCIAL QUALITY

Contrary to the *quality of life*, which is mostly used in a scientific context, *social quality* is more strongly linked to politics. The term is used almost exclusively in EU documents or publications issued within the scope of the EU. The frequency of its use nevertheless indicates that *social quality* has become a key term and concept within the EU. In spite of its prominence in the political discourse, the search for a comprehensive explanation or definition has yielded little of relevance. The only definition found in our Internet search describes *social quality* as

[...] the extent to which citizens are able to participate in the social and economic life of their communities under conditions which enhance their well-being and individual potential. (Duffy, 2001, p. 2)

### 2.1 Scientific context

The Internet search found no scientific research efforts on the subject of *social quality* of a scale comparable to the research into *quality of life*. The concept was developed by the European Union and has been applied primarily in work programmes and texts of the EU.

In recent years, both the EU and the scientific community have been showing an increasing interest in methodological issues on the subject of *social quality*, emphasising, in particular, the indicators for *social quality*. Some ongoing preliminary discussion of definitions and methodologies is at present mostly confined to the EU context. For this reason, it is described in Section 2.2.

## 2.2 EU context – political understanding

The above-mentioned definition of *social quality*, developed by Katherine Duffy, was introduced at the conference on social and labour market policies, organised by the *European Foundation on Social Quality 1998* in 2001. According to this definition, the individually experienced scale of *social quality* depends on the following factors:

- the degree of economic security,
- the level of social inclusion,
- the extent of social cohesion or solidarity,
- the level of autonomy or empowerment and the health of European citizens. (Duffy, 2001, p. 2)

Benchmarks for quality criteria are

- adequacy: What kind of standard of living do social policies provide?
- accessibility: Are the rules complex? Are there geographical differences?
- affordability: Are there user charges?
- accountability: Who is responsible? (Duffy, 2001)

Already in 1997, several experts submitted a comprehensive study on *quality of life* in Europe. This presentation had been accompanied by an appeal for an initiative under the heading of the *Amsterdam Declaration on the Social Quality of Europe*. In short, the objective of this Declaration is a Europe which guarantees security and protection against violence and ecological threats. Its aim is to secure such fundamental material safeguards as the right to decent housing and measures against discrimination, the guarantee of political rights, etc.

### 2.2.1 Why is there an interest in the concept of *social quality*?

The European Commission emphasises the strong link between *social quality* and the competitiveness of enterprises, the effectiveness of social policies, the well-being of individuals, etc. The Commission aims to improve *social quality* by

- integrating economic, employment and social policies, with a view to getting them to work together,
- promoting flexibility and security in the knowledge-based economy and society,
- applying the Treaty provisions on anti-discrimination and inclusion to the objective of mainstreaming cohesion,
- finding ways to stop the transfer of inequalities across generations; developing systems that consider people's lives and life cycles, and restructuring social protection and tax and benefit systems for new conditions.

### 2.2.2 *Social quality and the Amsterdam Declaration on the Social Quality of Europe (1997)*

The *Amsterdam Declaration on the Social Quality of Europe* was the first official document dealing with the new term of *social quality*. The signatories of the declaration envisage

a European society that is economically successful, but which, at the same time, promotes social justice and participation for its citizens. This would be a Europe in which social quality is paramount. Its citizens would be able and required to participate in the social and economic life of their communities and to do so under conditions which enhance their well-being, their individual potential and the welfare of their communities. To be able to participate, citizens must have access to an acceptable level of economic security and of social inclusion, live in cohesive communities, and be empowered to develop their full potential. In other words, social quality depends on the extent to which economic, social and political citizenship is enjoyed by all residents of Europe. In a globalised economy, competitiveness should go hand in hand with the promotion of social cohesion and the realisation of the full potential of each European citizen. (Amsterdam Declaration on the Social Quality of Europe, 1997)

### 2.2.3 *Social quality and the Social Agenda (2000) – European Union*

The Nice Summit of December 2000 approved a new European *Social Agenda* for the European Union for the next five years. The objective is to strengthen and modernise the European social model. Key policy priorities are

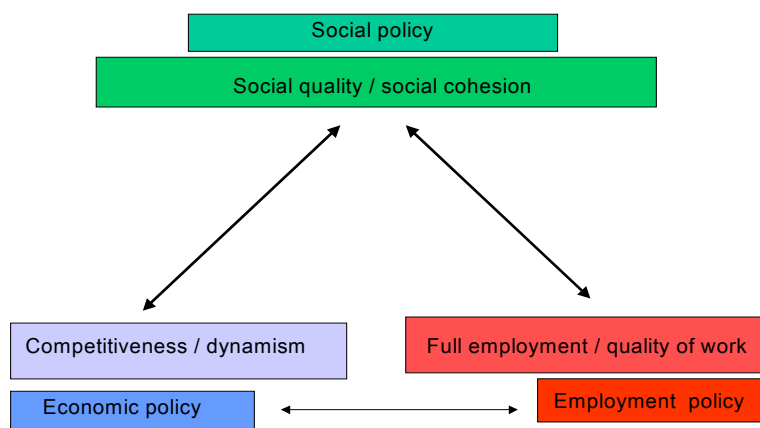
- employment,
- social protection,

- gender equality,
- social exclusion and discrimination,
- social dialogue,
- preparing for enlargement.

### 2.2.4 Social quality and the Social Policy Agenda (2000a) of the European Commission

The work programme pursued by the European Commission’s Directorate General for Employment and Social Affairs the until 2005, i.e. the *Social Policy Agenda*, is based on the guiding principle of strengthening the role of social policy as a productive factor and modernising and improving the European social model. This should lead to a policy mix, i.e. to a dynamic and positive interaction between economic, employment and social policies. *Social quality* is a key element in this process.

**Table 1: Policy challenge**



Source: *Social Policy Agenda 2000*

The *Social Policy Agenda* focuses on the promotion of quality in all areas of social policy: quality of training, quality of work, quality of industrial relations and quality of social policy as a whole are essential factors if the European Union is to achieve the goals it has set itself regarding competitiveness and full employment.

### 3 QUALITY OF LIFE VS. SOCIAL QUALITY (FOCUS MONITORING 2001)

How can we differentiate between *social quality* and *quality of life*? *Social quality* represents the outcome of a fair and inclusive society. It is a dynamic concept, integrating the multiple determinants of the *quality of life* for the people living in Europe: economic, social, cultural, political, etc. It puts light not only individual determinants, but also the interplay between the policy action in different fields and external factors (globalisation, ageing, etc.).

*Quality of life* can be considered a key concept that is enlarged by *social quality*. The *quality of life* of individuals and groups is determined by the circumstances influencing individual living conditions and by components of subjective well-being. *Social quality* is policy-oriented and thus transcends the concept of *quality of life*.

In contrast to *social quality* as the more general concept, it is useful to delimit the content when referring to *quality of life*, i.e. to link it to a given group whose *quality of life* is measured. When interpreting indicators to measure these two concepts, a consensus must be achieved that either more or less is desirable with regard to the value of any given indicator (= *normative significance*).

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