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## SOCIAL INEQUALITIES OF THE EUROPEAN ECONOMIC SPACE IN THE CONTEXT OF GLOBAL TRANSFORMATIONS

### **Abstract**

**Introduction.** *In a context of increasing global economic transformations, both external and internal challenges for the economic space of the European Union grow.*

*In this context, social inequalities between EU member states are deepening, which requires the search for new methods and approaches to overcoming social imbalances, i.e. characterize the social orientations of the European Union and assess the state of social inequalities between the member states, identify possible risks for its deepening and ways to reduce the negative consequences for the EU economy and national economies.*

**Methods.** *Abstract and logical, historical methods, methods of system analysis and theoretical generalization, analysis, synthesis and comparison are used to achieve the goal in the study.*

**Results.** *It is established that the global economic crisis has become a catalyst for social and economic reforms in the EU countries and strengthened social stratification. The basis of legal regulation of the European concept of social justice is revealed. The existence of social inequalities of the European economic space and polarization of countries by the level of social justice is confirmed.*

*It is substantiated that the European social model under the influence of EU enlargement, global transformations and crisis phenomena has significantly weakened. The basic measures for overcoming social inequality in the European economic space are determined, in particular: implementation of innovative approaches to the processes of social coordination and cohesion of countries, strengthening social responsibility of business, implementation of state employment programs, development of inclusive social security programs, inter-institutional partnership, coordination of national migration programs within the EU, etc.*

**Discussion.** *The proposed measures will enable to achieve social integration and unity for the European Union and its member countries, implement productive reforms that reduce gaps in social and economic development of countries and are aimed at achieving social justice.*

**Key words:** *globalization, global transformation, Europe-2020, European economic space, European Union, social inequalities, social justice, global economic crisis.*

### **Introduction.**

Global economic transformations became a defining feature for the formation of institutional and value principles of the global economic system at the end of the twentieth century, while at the beginning of the XXI century they accelerated the processes of inequality in the world in the context of global disintegration, deepening the asymmetry of countries' development. Destructive processes in the economy occurred in all countries, regardless of the level of economic development. Traditionally stable European Union to external challenges and threats after the global economic crisis of 2007-2008 was unable to accumulate enough resources to restore the pace of economic growth.

Along with the financial imbalances, which were triggered by global challenges and caused

destabilization of the monetary and financial systems of the EU member states; social and economic problems that exacerbated the existing gaps in social development in the European Union were also aggravated.

Changing the world economic order, reforming forces in the global space, global economic and migration crises can be a major challenge for the stable functioning of the European economy in the future.

#### **Analysis of recent research and publications.**

The works of famous foreign and domestic scientists are devoted to the problems of social and economic inequality of countries in the conditions of globalization. In particular, these issues are considered by such scientists as: Samir Amin, Amartya Sen, Michael Spence, Joseph Eugene Stiglitz, V. Adamyk, O. Dluhopolskyi, N. Kravchuk, A. Poruchnyk, Ye. Saveliev, Ya. Stoliarchuk, V. Chuzhykov and others. At the same time, some aspects of this multifaceted problem remain beyond the attention of scholars and are insufficiently substantiated, namely: the current social and economic challenges of the functioning of the unified European economic space during the period of global transformations.

#### **Purpose.**

The aim of this article is to characterize the social landmarks of the European Union and assess the state of social inequalities between the member states, identify possible risks of its deepening and ways to reduce the negative consequences for the EU economy and national economies.

#### **Methodology.**

The following methods are used to achieve these goals: theoretical generalization and comparison, statistical analysis, abstract and logical method, methods of analysis and synthesis.

#### **Results.**

The paradigm of human civilization development has been formed for centuries under the influence of numerous challenges that highlighted one of the fundamental principles of globalization – the unity of humanity and unification for the purpose of solving common goals. Therefore, the position of researchers that human progress is ultimately aimed at eliminating racial, religious, national differences, the unity of mankind, which should be understood as the ability of a person to unite to preserve oneself as a species, is appropriate.

Accordingly, global transformations brought countries closer to each other, but at the same time deepened the social and economic differentiation between them, which actualized the issue of equity in the distribution of public goods and equal access to resources. Social justice and social equality today have gone beyond identification with poverty alone. The global initiatives of international organizations and regional associations played very important role in this. First of all, it is about the declared principles of sustainable development, the unification of economic, environmental and social components.

This approach greatly expanded the possibilities of social consolidation of societies and their socialization. At the same time, we note that integration of ideas of social justice and sustainable development in practice did not provide the expected results, although the Millennium Development Goals by 2015 were still partially achieved [1] and received continuation as strategic priorities of human development until 2030 [2]. Among them – the social component is particularly clearly outlined and inextricably linked with the increase of economic stability of the countries, which will enable to provide adequate financial support for social progress.

At the same time, global transformations of the last decade have failed to stop the negative effects of the global economic crisis, which has affected the long-term slowdown in economic growth, first of all, in economically developed countries.

However, the tendencies of the world economy's development in recent years point to positive

trends and optimistic forecasts. According to preliminary calculations, economic growth in 2016 amounted to 3.1% (at a forecast of 3.2%); according to forecasts in 2017 and 2018, global growth would be 3.5% and 3.6% respectively [3].

Along with the financial and trade risks, other, equally important, social and economic issues are kept: the increase in the number of migrants, the unsolved problems of hunger, the lack of medical care, etc., which require the expansion of international cooperation and the introduction of inclusive approaches [3].

Potential threats are the strengthening of protectionist policies, and the most worrying is the European Union, which, in increasing internal instability, tries to keep up the situation through hidden methods of protecting the internal market and preserving its positions.

United Europe in the postwar period has become an example of professing common values by member states to achieve sustainable economic and social development, so it is no coincidence that it was considered the highest achievement of modern civilized development with great potential [4, p. 8].

The European Union evolutionarily passed all stages of integration and has structurally formed according to the criteria that were selected by the landmarks. However, throughout the whole process, from Europe-9 to Europe-28, the values and human-centered model of social and economic development of the regional integration association have not changed.

Successfully formed European economic space in the theoretical models, in which countries have equal rights and freedoms of life and the implementation of economic activity, has received the legislative design.

Thus, the social orientation of the economic development of the European Union was defined by the European Social Charter, which ensures the realization of the social rights of citizens of the countries that have signed it [5].

The welfare of the population, the creation of conditions for development and social progress have been identified in the Treaty on the European Union as one of the purposes of its creation [6; 7]. The functioning of the Union is aimed at overcoming social marginalization and discrimination, promoting social justice and protection, ensuring gender equality and protecting the rights of the child. The Treaty on establishing the European Community for the purposes of the community declared strengthening of social cohesion and a common policy in the social sphere (including creation of the European Social Fund) [8].

The Lisbon Strategy, adopted in 2000 and subsequently upgraded, has become an important addition to the legal regulation of the European concept of social justice. The main task of this Strategy was to ensure the competitiveness of the economies of the member countries, their development based on innovation, providing investment in human development, achievement of employment of the working population and its social protection, etc. However, the strategies were not implemented due to the lack of a sequence of their achievement and clearly defined measures, as well as the global challenges caused by the global crisis, which had an effect on the decline of economic growth, made social progress impossible [9].

Thus, in the study [10], the implementation of the objectives of the Lisbon Strategy by the main directions of the EU-27 country is lagging behind the United States and the countries of East Asia (calculated for the 5 most competitive Asian economies), with the exception of the goals of sustainable development (Table 1) and in the sphere of the modernization of social protection.

Among the 27 EU countries, Sweden, Finland, Denmark, the Netherlands and Luxembourg ranked among the leaders in the overall ranking. Greece, Poland, Italy, Romania, Bulgaria were outsiders. By social sub-index the lowest was the rating in Hungary, Greece, Italy, Latvia and Bulgaria. However, this strategy initially set the benchmarks for development, which forced the countries to carry out social and economic reforms to achieve them, and nevertheless the result from which was noticeable in comparison with 2000.

Table 1

**Lisbon Scores: Comparing the EU with the United States and East Asia\***

	EU 27 (average)	United States	East Asia
Information society	4,73	5,79	5,56
Innovation and R&D	4,23	6,03	5,24
Liberalization	4,80	5,05	5,10
Network industries	5,39	5,73	6,06
Financial services	5,05	5,22	5,41
Enterprise	4,60	5,07	5,17
Social inclusion	4,51	4,71	4,93
Returning people to the workforce	4,97	5,39	5,41
Upgrading skills	4,47	5,09	5,09
Modernising social protection	4,10	3,66	4,30
Sustainable development	5,16	4,59	4,74

\*Source: prepared by the author using material [10, p. 11].

The global economic crisis has become a signal that the European economy needs new radical changes. The next significant document for achieving the socialization of economic development of the EU and the equalization of inequalities was the Europe 2020 strategy. The main priorities were identified the following: smart growth (based on knowledge and innovations); sustainable growth (based on the principles of sustainable development); comprehensive growth (establishing a high-employment economy that will promote social cohesion). This allowed the formation of seven key initiatives that address the social and economic issues.

The main objectives of the strategy are: to solve the problem of employment – at least 75% of the working-age population must be employed; not less than 3% of GDP should be directed towards the development of research activities; not less than 40% of young people must receive higher education; harmful emissions to the environment, greenhouse gas emissions and increased share of renewable energy sources in final consumption should be reduced to improve the environmental situation; a decrease of 20 million people living below the poverty line and being in social isolation, etc. [11].

United efforts to achieve its goals with civic organizations, to strengthen coordination of countries for social protection and social integration, use of EU funds to support social integration are declared in the field of social initiatives. At the same time, monitoring the implementation of the goals of the declared documents still points to the unsolved problems for ensuring social equality and reducing inequalities in the development of member states, especially as the individual indicators are overestimated and do not take into account the challenges of global transformations. In this context, we see two main reasons.

Firstly, EU member states have a common legal framework that regulates the peculiarities of economic and social policies of each country, respectively, countries outside the Union (the third countries) fall into a completely different dimension of relations. Therefore, the European Union, having received challenges and threats from the external environment, automatically distributes them to member countries that are closely interconnected with a single economic space, but not each country has sufficient mechanisms of counteraction. Thus, a weak link in the association is formed, which is most painfully affected by the EU's competition in the global space.

Secondly, its members were countries in the process of enlarging the European Union that, despite a number of successful reforms and admission criteria, failed to achieve the development of "old" members. Thus, competition intensified not only with the outside world, but also within the association, which jeopardizes the achievement of the principle of social justice, the provision of which is directly dependent on the financial capabilities and economic potential of countries.

Today, the scientific discourse on the classification of social indicators and the structure of social dimensions is incomplete, as indicated by researchers [12]. The lack of a single system of indicators and

methodological approaches does not allow systematically evaluating processes of social inequality either globally or regionally. However, the most frequent is the practice of coverage for research, in addition to indicators of well-being, all areas that reflect the human's vital functions – such as education, health, the environmental component, access to drinking water and energy sources, population policy, social protection, etc.

The positioning of the countries of the European Union is essentially differentiated according to a number of economic and social indicators, which is intensified by different levels of globalization. Thus, differentiation of the EU countries is marked (Table 2) according to the index of globalization, which is calculated by the Swiss Institute of Economics (KOF Swiss Economic Institute), and in the last decade, individual countries have increased the level of openness to global interaction, but have overcome the gaps with the leaders of the countries.

Table 2

**The dynamics of the index of globalization of the EU member states\***

Country name	2005	2006	2007	2008	2009	2010	2011	2012	2013	2017
Austria	90,82	90,93	91,87	91,1	90,88	90,43	90,39	90,33	89,09	90,05
Belgium	91,3	91,74	92,41	92,2	92,2	91,99	91,66	91,17	90,7	91,75
Bulgaria	66,74	70,56	73,85	73,06	71,09	70,59	70,29	75,57	76,98	76,89
Cyprus	75,8	76,11	87,23	87,32	87,13	86,82	86,07	84,69	84,59	85,0
Czech Republic	83,57	83,79	85,05	84,37	84,1	83,8	83,16	83,72	83,16	84,88
Germany	85,45	85,75	86,48	85,5	84,86	84,97	84,65	84,31	83,41	84,57
Denmark	89,49	89,33	90,01	89,2	88,19	88,43	88,22	87,17	86,99	88,37
Spain	84,48	85,09	85,92	85,3	84,71	84,9	85,01	84,3	83,68	84,56
Estonia	76,32	77,04	77,93	78,05	77,75	78,58	78,67	78,9	78,3	79,27
Finland	85,99	86,26	87,22	86,16	85,08	85,75	86,2	86,32	85,24	86,3
France	86,83	87,07	88,23	87,55	87,23	87,35	86,97	86,96	86,09	87,19
United Kingdom	89,47	89,06	89,19	88,94	88,87	88,89	88,69	88,09	87,22	87,26
Greece	80,42	81,01	82,59	82,76	81,4	81,26	80,91	79,82	80,18	80,6
Croatia	72,59	73,58	75,3	75,01	75,37	75,0	74,3	75,77	75,13	81,39
Hungary	85,16	86,55	86,61	86,51	86,99	86,74	86,05	85,85	85,84	86,55
Ireland	86,78	86,12	86,64	85,93	92,34	92,28	92,14	91,39	91,51	92,15
Italy	81,67	81,77	82,85	82,46	82,28	82,28	81,88	81,33	80,94	82,19
Lithuania	69,88	70,89	72,81	72,23	68,52	71,77	72,88	72,53	77,08	77,47
Luxembourg	80,37	80,05	85,62	85,39	85,43	84,91	84,63	84,12	84,09	84,21
Latvia	66,94	68,77	69,54	68,92	65,55	68,9	69,59	70,53	70,27	71,45
Malta	73,83	74,5	75,47	75,62	76,16	76,14	75,88	75,81	75,06	75,86
Netherlands	91,08	91,2	92,38	91,87	91,35	91,98	92,09	92,12	91,72	92,84
Poland	78,01	79,67	81,15	79,82	80,45	79,46	78,67	79,38	80,34	81,32
Portugal	85,41	86,2	87,61	86,97	86,73	87,23	86,18	85,63	84,05	85,04
Romania	66,59	66,5	75,81	74,92	74,4	73,51	72,65	74,09	75,29	76,51
Slovak Republic	83,88	84,55	84,9	84,72	83,97	84,45	84,61	83,4	83,16	84,36
Slovenia	74,72	75,82	78,18	78,46	76,79	76,64	76,55	76,18	76,0	76,91
Sweden	89,57	89,35	89,41	88,95	88,58	88,42	87,73	87,12	86,05	87,96

\* It is made according to the data of KOF Index of Globalization [Electronic Resource]. – Mode of access: <http://globalization.kof.ethz.ch/>

The employment issues and rising unemployment for the European Union countries continue to remain one of the most important, despite their priority in the Europe 2020 strategy. 2012 was critical to the EU labor market, at the end of which the highest unemployment rate was reached in 1995 – 10.7% (in the euro area – 11.7%) [14], which marked the beginning of the social crisis.

Table 3

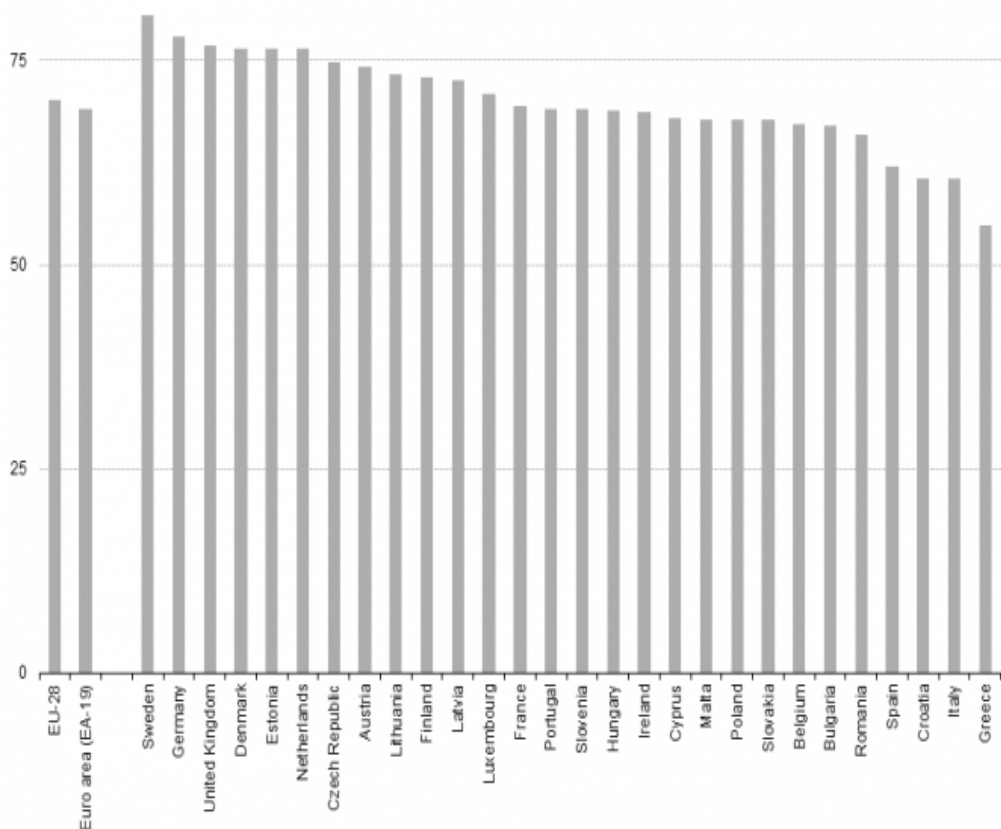
EU Social Justice Index\*

Rank	Country	2008	2011	2014	2015	2016
1	Sweden	7,58	7,39	7,48	7,40	7,51
2	Finland	7,22	7,11	7,08	7,29	7,17
3	Denmark	7,35	7,07	7,17	7,13	7,16
4	Czech Republic	6,74	6,75	6,66	6,74	6,85
5	Netherlands	7,17	7,09	7,00	6,91	6,80
6	Austria	6,88	6,57	6,67	6,64	6,67
7	Germany	6,23	6,39	6,67	6,57	6,66
8	Luxembourg	6,41	6,58	6,60	6,50	6,57
9	Slovenia			6,39	6,35	6,51
10	France	6,27	6,18	6,16	6,22	6,27
11	Belgium	6,19	6,24	6,16	6,21	6,18
12	United Kingdom	6,02	6,01	6,00	6,01	6,16
13	Estonia			6,24	6,29	6,15
14	Poland	4,56	5,12	5,38	5,54	5,81
	EU Average	6,06	6,00	5,62	5,63	5,75
15	Lithuania			5,43	5,46	5,69
16	Malta			5,40	5,36	5,57
17	Slovakia	5,66	5,54	5,30	5,38	5,55
18	Ireland	5,91	5,52	5,09	5,16	5,40
19	Croatia			4,69	4,95	5,07
20	Cyprus			5,10	5,03	5,04
21	Latvia			4,64	4,70	5,04
22	Portugal	4,97	5,03	4,95	4,81	4,97
23	Hungary	5,08	4,83	4,54	4,47	4,96
24	Italy	5,10	5,11	4,56	4,63	4,78
25	Spain	5,45	5,04	4,78	4,75	4,76
26	Bulgaria			3,83	3,85	4,03
27	Romania			3,72	3,54	3,91
28	Greece	4,44	4,44	3,58	3,64	3,66

\*Source: prepared by the author using material [13].

The post-crisis 2008-2013 years were the most difficult to solve the unemployment problems, and although the problem has been partially resolved, 8.6% of the EU's population remains unemployed. According to the employment rate of the various EU member states, the lowest employment rate was in 2015 in Spain (62.0%), Croatia (60.5%), Italy (60.5%) and Greece (54.9%) (Fig. 1). The employment rate is lower among women and elderly people.

Reducing birth rates and increasing longevity of the population remains an additional risk factor for stabilizing the social and economic development of the European Union. The budgetary implications of this situation are inherent in most countries of the world, regardless of their economic development [16]; however, there are significant inequities in life expectancy in the EU countries: the lowest rates are typical for Romania (73.7 years), Bulgaria and Latvia (74.5), Lithuania (74.7) with an average value in the EU for about 80 years.



**Fig. 1. Employment rate, age group 20–64, 2015 (%)\***

\*Source: prepared by the author using material [15].

Reforms require the system of educational and medical services in EU countries, because, as evidence shows, there are significant differences in the amount of state funding of these services and access to them by the population [17; 18]. According to the index of human development, over the years, the leaders of the EU member states have been formed, which, in terms of economic prosperity, significantly outstrip outsiders (for example, Germany with an index of 0.926 and Bulgaria with an index of 0.794) [18].

Thus, the European Union, with declared unifying principles in the modern globalized world, faces numerous challenges and threats, some of which, of a social nature, have an intrinsic nature, increase inequality in the economic space of the EU and require a compulsory solution, mitigation of their negative consequences for countries and the whole association.

### **Conclusion and prospects.**

The study confirms that the fundamental principles of the unity of the European economic space, on the one hand, have contributed to the approximation of national economies and the creation of the European Union as integral union of countries with common goals and objectives. On the other hand, the EU uniqueness poses new challenges and challenges for countries: the commonality and simultaneous implementation of reforms, the elimination of discriminatory mechanisms in interaction, the development

of not only a common legal framework and stabilization mechanisms, but also the differentiation of approaches to financial support for reforms in different countries.

An integrated approach to solving social and economic problems of European countries is inevitable, because they also depend on fiscal and budgetary policies, monetary, investment, etc., given the subsidizing nature of individual EU economies. The global economic crisis has become a catalyst for social and economic reforms in the EU countries – it showed how socially stratified is the European economic space, has been able to identify weaknesses and point to the need to change priorities in both external and internal policies. Moreover, the competitive struggle between countries within the EU reduces its potential in the global space.

Therefore, the European social model under the influence of global transformations and crisis phenomena, as well as the EU's own enlargement, has significantly weakened.

The social unity of countries in the single economic space of the EU should become a priority for the whole of the EU, as the study showed that the social problems, despite the general nature, have a territorial manifestation. Therefore, for individual countries, they are cyclical, transmitted by inheritance, and most of them can not get rid of the status of outsiders on indicators of social and economic development. For such countries, it is important to introduce accelerated, effective reforms that would, if not equalize the levels of economic development of the countries, at least reduce the gap between them.

In the long term, the social challenges facing the EU's economic development will not weaken, but will take on other forms. Therefore, the main measures to overcome social inequality in the European economic space are the following: development of innovative approaches to processes of social coordination, strengthening social responsibility of business and active use of mechanisms for corporate social responsibility, including promotion of social enterprise development; the implementation of state employment programs (primarily in regions with high unemployment rates), the expansion of access to the labor market for women and older people, the development of inclusive social security programs; inter-institutional partnership and expansion of cooperation with civil society; the development of integrated educational programs and the expansion of access for the population (especially socially isolated) to medical services; attraction and adaptation of migrants to the economic and social life of countries, reorientation from social welfare programs to social support; coordination of national migration programs within the EU; adaptation of the European Social Fund (ESF) financing mechanisms to current social integration issues and the development of mechanisms for redirecting financial resources between programs to prevent social inequalities; implementation of social cohesion programs.

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## СОЦІАЛЬНІ НЕРІВНОСТІ ЄВРОПЕЙСЬКОГО ЕКОНОМІЧНОГО ПРОСТОРУ В КОНТЕКСТІ ГЛОБАЛЬНИХ ТРАНСФОРМАЦІЙ

### Анотація

**Актуальність.** В умовах посилення глобальних економічних трансформацій зростають як зовнішні, так і внутрішні виклики для економічного простору Європейського Союзу. У даному контексті поглиблюються соціальні нерівності між країнами-членами ЄС, що потребує пошуку нових методів та підходів до подолання соціальних дисбалансів, тобто охарактеризувати соціальні орієнтири Європейського Союзу та оцінити стан соціальної нерівності між країнами-членами, виявити можливі ризики її поглиблення та шляхи зменшення негативних наслідків для економіки ЄС і національних економік.

**Методи.** Для досягнення поставленої мети в процесі дослідження використано абстрактно-логічний та історичний методи, методи системного аналізу і теоретичного узагальнення, аналізу, синтезу та порівняння.

**Результати.** Встановлено, що світова економічна криза стала каталізатором соціально-економічних реформ в країнах ЄС та посилила соціальну стратифікацію. Розкрито основи правового регламентування європейської концепції соціальної справедливості. Підтверджено існування соціальних нерівностей європейського економічного простору та поляризацію країн за рівнем соціальної справедливості. Обґрунтовано, що європейська соціальна модель під впливом розширення ЄС, глобальних трансформацій та кризових явищ значно послабилася. Визначено основні заходи для подолання соціальної нерівності в європейському економічному просторі, зокрема: впровадження інноваційних підходів до процесів соціальної координації та згуртованості країн, посилення соціальної відповідальності бізнесу, реалізація державних програм зайнятості, розвиток інклюзивних програм соціального забезпечення, міжінституційне партнерство, координація національних міграційних програм в межах

ЄС та ін.

**Перспективи.** Запропоновані заходи дадуть можливість Європейському Союзу та його країнам-членам досягти соціальної інтеграції та єдності, впровадити результативні реформи, які б зменшили розриви в соціально-економічному розвитку країн та були спрямовані на досягнення соціальної справедливості.

**Ключові слова:** глобалізація, глобальні трансформації, Європа-2020, європейський економічний простір, Європейський Союз, соціальні нерівності, соціальна справедливість, світова економічна криза.

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