

7. Social convergence and the transitions: which direction?

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INTRODUCTION

The global political environment of the past decade was marked by unprecedented complexity and uncertainty. Escalating geopolitical tensions, the digital transformation driven by artificial intelligence (AI), and migration flows significantly impact European Union (EU) citizens (Eichhorst et al., 2018). These interconnected forces profoundly and rapidly affect socio-economic inequality and skill demands across the EU, often intensifying inequalities and exacerbating skill mismatches (Mathijssen et al., 2024).

Within such a context, the EU wants to achieve social convergence and a just transition¹. Given that the three transformations discussed in this book drive economic change and disrupt the EU's social fabric, social convergence may be further away than expected. Baldwin (2018) expects economic forces to push for global economic convergence. Technology enables developing countries to catch up with their developed counterparts and achieve higher economic performance. Other observers are not that optimistic. Streeck (2023) has no sympathy for a “borderless world of free markets under American law”. He even pleads for deglobalisation, which is “a non-globalist global order, indeed a non-globalised constitution for a global society governing its global economy while respecting the diversity of its local economies and societies”. The EU is at a crossroads. Does it build its social convergence on the (US)

¹ A Strong Social Europe for Just Transitions. Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, 2020.

globalisation (or hyperglobalisation [Rodrik, 2019]) and technological dominance, or does it try to find an alternative route?

Despite these challenges, recent surveys indicate that EU citizens continue to support active EU policies favouring globalisation, digitalisation, and mobility (Hoffmann & Vries, 2024). For instance, 55 per cent of EU citizens view globalisation as an opportunity, and 70 per cent believe the EU should play a more active role in world affairs. Additionally, 73 per cent of EU citizens see digitalisation as an opportunity, and 61 per cent agree that policies to protect jobs affected by robotisation should be implemented at the EU level. Finally, most EU citizens believe freedom of movement has had more benefits than costs for their country. These results suggest that, despite the rise of populist movements within the EU, citizens still believe in the positive welfare effects of globalisation, technology, and migration. However, support for digitalisation, globalisation and migration may gradually diminish in the coming years. This is driven by the EU's stagnating economy, rising living costs, increasing far-right influence on politics, and broader international political developments and conflicts (Streeck, 2023). With the second Trump administration, anxious and critical sentiments towards migration technology and globalisation might rise even further in Europe.

Against this backdrop, the EU and its member states must contemplate a new social policy narrative towards EU-internal convergence. The European Commission has always believed that its social policy should be able to manage the three transformations. Also, in the new European Commission (2025–2030), the adage remains that economic convergence, built on the three transformations, requires social convergence (Dhondt, 2024). If we believe in this social convergence, how does this relate to the policies conducted by the different EU member states? Do the member states want this social convergence? Which convergence is this? We know that the social models of the member states are quite different (Esping-Andersen, 1990), even 30 years after the Maastricht Treaty. Can social convergence be achieved if we keep having such different social models?

The central question of this chapter is how the EU should navigate the rapidly changing areas of globalisation, technology, and migration and the extent to which considerations of inequality and skills play a crucial role. Based on GI-NI research (e.g., Aldaz et al., 2025; Kampert et al., 2024; Los & Ye, 2023; Mathijssen et al., 2024), this chapter argues that European prosperity is best advanced through increased but carefully guided globalisation, digitalisation, and migration. What are the arguments for a narrative of social convergence? What is needed in the EU to counteract deglobalisation trends, increase EU-internal technology investments, and fill labour market gaps with targeted migration while mitigating inequality and skill mismatches?

Our argument is built up in three steps:

1. We begin by discussing how social policy in the EU addresses inequality and skills development. How does EU social policy respond to new challenges? What does social convergence mean in this context? Are we seeing a convergence in social models?
2. We describe two countries' perspectives on managing inequality and skills. Member states have a significant voice in social policy, generally more so than any EU institution (Daly, 2019). We examine the cases of the Netherlands, a wealthy country with a robust social system, and Norway, a country in a similar context, outside the EU but in the European Economic Area (EEA). The 'outside' perspective of Norway is interesting to see how much traction EU policies may have. The changed international environment (think 'Trump') challenges the outside-EU neighbours even more than in the past. These countries are selected due to their advanced social policies and welfare systems, which provide valuable insights into effective strategies for addressing inequality and skills mismatches. Their high rankings on various economic and social indicators underscore the effectiveness of their social policies. Both nations have demonstrated significant progress in these areas through innovative social policies and investments in education and training, highlighting best practices and lessons that can inform EU-wide policy development. At the same time, these countries face barriers to adapting to the three major transformations and securing regional convergence. The historical context and policy evolution in both countries provide a rich basis for understanding the adaptation of social policies to new challenges. The comparative analysis between a member state (the Netherlands) and a non-EU country (Norway) within the EEA offers insights into the impact of different governance structures on social policy outcomes. Can we observe differences in their approaches? Have these member states changed their social models over time? Moreover, how do these changes relate to EU policymaking?
3. We also need to be forward-looking and understand what is needed for future social convergence. Based on a scenario analysis constructed and validated in prior GI-NI research, with varying degrees of (de)globalisation, digitalisation, and mobility, we demonstrate the significant risks associated with deglobalisation, insufficient investment in technology, and restricted migration for EU citizens, overall welfare, and inequality.

These steps bring us to the question of what is expected of social convergence in Europe. Can social convergence arise in the context of conflicting economic developments? Streeck (2023) indicates that Europe has opportunities to move forward without the need for political convergence. We address these questions in the final section of the chapter.

STEP 1: THE LIMITS OF EUROPEAN SOCIAL POLICY

The Unfulfilled Ambitions of the EPSR

While many member states continuously declare their interest in aligning social standards across Europe, policy implementation often clashes with the EU principle of subsidiarity, meaning that the EU does not interfere where national systems are sovereign. Social convergence across the continent has been a European policy objective since the Treaty of Rome. It was emphasised in the social protocol of the Maastricht Agreements, although it was ultimately excluded from the final agreement (Treaty Establishing the European Economic Community [Treaty of Rome], 1957; Treaty on European Union [Treaty of Maastricht], 1992). This objective faced significant challenges during the period of stringent fiscal policies implemented post-2009, which were primarily aimed at preserving the monetary union of the Euro. At the time, policymakers equated convergence with fiscal prudence, demanding that countries implement reforms and demonstrate ‘solid’ financial management as a condition for receiving solidarity support. However, this approach often reflected social convergence only in outcomes rather than underlying social models (Daly, 2019; Van Cleynenbreugel, 2019).

The severe fiscal constraints following the Eurocrisis limited investments in sustainable development and social welfare systems. In response, the European Pillar of Social Rights (EPSR) was proclaimed in 2017 to articulate a broader social perspective. The EPSR focuses on 20 principles and rights, including social protection, labour law standards, unemployment protection, minimum pay and income, and access to essential services. This initiative directly influences national economic and social policies (Dhondt et al., 2022; Hacker, 2023). The EPSR envisions a European social union, delineating clear social outcomes that the EU should aspire to achieve. However, it stops short of prescribing a unified social model.

The COVID-19 pandemic highlighted the urgent need for a robust and adaptable social policy framework to address large-scale employment and social welfare disruptions. The unprecedented social and economic disruptions necessitated swift responses with instruments like the Temporary Support to Mitigate Unemployment Risks in an Emergency (SURE), the Recovery Resilience Facility (RRF), and European Social Fund Plus (ESF+), providing immediate relief and fostering resilience among EU member states (Hermans et al., 2023). Before the pandemic, the EU social policy focused on labour market activation measures to support unemployed individuals in re-entering the workforce (De Becker, 2024). However, this approach often neglected comprehensive unemployment protection. The pandemic prompted a shift towards

temporary support and policy adjustments within member states (De Becker, 2024). This shift highlighted the need for a more balanced approach integrating activation and protection measures.

Despite developing various measures since the pandemic to assist member states, these initiatives explicitly avoided creating incentives for member states to reduce their structural social protection measures. The EPSR, therefore, does not alleviate the tensions between member states and the EU (Daly, 2019). At the same time, while social policy regimes remain highly heterogeneous in approaches and impact, countries remain reluctant to give further powers to the EU, preferring to retain control over their social policies (Papp, 2019). Consequently, aligning laws in the social domain remains limited, as the diverse socio-economic contexts make it difficult for member states to adopt similar institutions. This fragmentation is further exacerbated by varying national priorities and economic conditions, which complicate efforts to harmonise social policies across the EU.

The EPSR and the Transformations

In this context, the EU has developed policies addressing the social implications of the GI-NI project's three transformations: globalisation, technology, and migration. The EU is committed to reducing inequality and fostering skill development through targeted policy initiatives and funding mechanisms. This commitment is translated into action plans aimed at complementing national social policies. For employment, skills, and social protection, three key objectives have been set:

1. At least 78 per cent of the population aged 20–64 should be in employment by 2030;
2. At least 60 per cent of all adults should attend training annually;
3. The number of people at risk of poverty or social exclusion should be reduced by at least 15 million by 2030, lifting all citizens to at least 60 per cent of the median income in the EU.

The EU has also formulated concrete indicators to monitor progress in social convergence, focusing on metrics such as employment rates, training participation, and poverty reduction. In 2018, Eurofound developed a methodology to measure convergence (Stefanini et al., 2023). The current view is that the increase in social convergence could be seen up to 2008–09, but after that date, progress has remained limited (Hacker, 2023). Chapter 6 discusses this convergence with statistical data.

Several European Commission measures address the impact of the three transformations studied in GI-NI. In March 2021, the Commission introduced

the Recommendation of Effective Active Support to Employment (EASE) to transition from emergency job-preservation measures during the pandemic to new measures for a job-rich recovery, job creation and job-to-job transitions, particularly towards digital and green sectors (see EASE²). In May 2023, the European Year of Skills was launched to address skills gaps within the EU and enhance the EU skills strategy, focusing on reskilling individuals in digital and green technology skills and supporting small and medium enterprises (see European Year of Skills³). The European Skills Agenda (DG EMPL), a five-year plan, supports individuals and businesses in developing and utilising better skills by 2025. The agenda aims to strengthen sustainable competitiveness, ensure social fairness and build resilience to respond to crises, drawing on lessons learned during the COVID-19 pandemic (see European Skills Agenda – European Commission⁴).

The policy landscape derived from these actions mainly addresses equipping workers and member states with knowledge and infrastructure to adapt their skillsets to market demands individually. Our assessment is that the primary goal of the different measures is to steer workers towards the skills and jobs that current and future labour markets demand. However, no EU institution is responsible for navigating changing skill demands. Still, there are many initiatives by the European Commission and the European Centre for the Development of Vocational Training (CEDEFOP) to aid member states and relevant labour market stakeholders, for instance, through aiding life-long learning. It is still up to the member states to take action (Greve, 2023; Petmesidou et al., 2023). Furthermore, the Green Deal supports skill transitions towards a more green and digital economy as a secondary objective.

Can We See Progress Towards a European Social Union?

Previous research indicates that the goals of the European Social Union, such as fostering social equity and achieving consistent policy implementation across member states, are not fully realised in practice (Dura, 2024). Although the EPSR aims for a high level of cooperation among all member states, in reality, it is more likely that only some countries will choose to implement these principles extensively, namely those who want to strengthen their social policy regardless of EU initiatives in the field. The EU-coordinated response to the COVID-19 pandemic is an exception to the rule; the EU still has no unified approach to social policy (Dura, 2024).

² https://ec.europa.eu/commission/presscorner/detail/en/qanda_21_971

³ https://year-of-skills.europa.eu/index_en

⁴ https://employment-social-affairs.ec.europa.eu/policies-and-activities/skills-and-qualifications/european-skills-agenda_en

Social policy seems to be subordinate to economic policy, suffering from the ambiguities within that economic policy (Schout & van Riel, 2022). The economic policy focuses on further industrialisation (Green Deal) but has an unclear stance in the globalisation debate (Schwaag-Serger et al., 2024). This lack of clarity in economic policy creates challenges for developing a cohesive social policy. As a result, social initiatives often take a back seat, leading to inconsistent implementation across member states (Eick, 2024a).

The effects of globalisation, such as specialisation in business functions and tasks, along with future technological developments, including automation and digitalisation, are not yet fully integrated into European social policy. Labour market transformations, such as the decline of blue-collar work in countries like Germany and the simultaneous increase in white-collar jobs within the same industries in advanced countries, highlight the need for updated policies. Since the EU is still uncertain about its direction regarding international cooperation, technology, and migration, the direction of social policy within those domains remains unclear. This lack of integration is due to the complex and multifaceted nature of these issues, which require coordinated efforts across various policy areas, posing a significant challenge in current EU governance. Additionally, the rapid pace of technological advancements often outstrips the ability of policymakers to adapt and implement effective social measures. Social policy remains reactive rather than proactive. While Europe's ambitions for social policy reform are significant, they are often constrained by structural limitations and political divergences among member states. The two case studies shed some light on this.

STEP 2A: THE NETHERLANDS: NEO-LIBERAL SOCIAL POLICY OVERLOOKS TRANSFORMATIONS

The Netherlands, one of the first EU member states, has traditionally been classified as a corporatist state, which means that it strives to seek the best representation of common interests (Esping-Andersen, 1990, see 'Polder' politics). Over the past two decades, however, (neo)liberal policies have shifted this social model towards reduced social protection and increased liberalisation of labour market regulation (Ferragina & Filetti, 2022). The country has focused on addressing three major social transformations: globalisation, technological change, and migration. Compared to other European nations, the Dutch population perceives these transformations and their impacts more strongly and as quite important for the country (Dekker et al., 2020). This case study explores how these transformations are managed and identifies areas requiring action at the national and EU levels.

As one of the world's most open and prosperous economies, the Netherlands has been shaped profoundly by globalisation, particularly through trade. GI-NI

research highlights the Netherlands' significant growth in trade exposure with Eastern Europe between 2002 and 2018, accompanied by advancements in automation (Seghir & Smolka, 2024b). These trends have driven labour market changes, including greater flexibility of labour, increased demand for digital skills, and shifts from production to services, trade, transport, and logistics. Over the twentieth century, employment has transitioned from manufacturing to white-collar roles, such as research and development and managerial positions (Los & Ye, 2023). Despite these changes, unemployment has remained stable, and displaced workers have been absorbed into other sectors without significant short-term wage impacts (Los et al., 2023). Until recently, public opinion in the Netherlands largely supported globalisation (Dekker et al., 2020).

However, global trade has eroded the industrial base, with industrial employment constituting less than 8 per cent of total employment by 2023 (Statistics Netherlands, n.d.). Technological advancements have had limited additional effects on the labour market, given these longstanding structural changes. Nonetheless, niche technological sectors have experienced a resurgence, supported by microelectronics companies like Advanced Semiconductor Materials Lithography (ASML), BE Semiconductor Industries (BESI), NXP Semiconductors (NXP), and Advanced Semiconductor Materials International (ASMI). These developments, along with thriving firms, such as Randstad, Booking.com, and Adyen, have been underpinned by education investments, though skill mismatches persist.

Migration has further shaped the Dutch workforce, influenced by its colonial past and successive waves of labour migration to meet sectoral shortages (van Stiphout-Kramer et al., 2024). Historically, the country integrated migrants from Suriname, the Moluccas, Turkey, and Morocco. More recent migration has resulted from conflicts in Syria, Afghanistan, and Ukraine. Although public attitudes towards migration were traditionally positive, opposition to immigration has grown in recent years (Vrooman et al., 2023). Migrants have been disproportionately affected by structural labour market changes, with educational mismatches initially declining but rising again, particularly for women (Seghir & Smolka, 2024a, Table 6). Growing dissatisfaction among certain groups indicates that those most negatively impacted by globalisation, technological change, and migration may harbour grievances (Seghir & Smolka, 2024a). The new right-wing government has embraced anti-migrant sentiments as a central political goal. Migration policies often diverge from EU mandates, especially regarding non-nationals' access to social security benefits (Kramer & Heindlmaier, 2021).

Over the past two decades, debates on globalisation, technology, and migration have had limited influence on Dutch social policy. Dominated by liberal parties (VVD, D66), the policy agenda has prioritised labour market activation

and participation over social equality (Ferragina & Filetti, 2022; Stiller & van Gerven, 2012). While unemployment is low (3.7 per cent in 2024) and labour force participation high (73 per cent of the 15–75 age group), challenges include an ageing population, overreliance on flexible contracts, and workforce attrition due to retirement. Incremental increases in the retirement age have positioned the Dutch workforce as the longest working in Europe. Despite these challenges, the Netherlands consistently exceeds EPSR objectives for employment, skills, and social protection (Hacker, 2023).

The Dutch social system is characterised by robust financial support for welfare programmes, healthcare, and education, often described as a ‘great equaliser’ (van Mulligen, 2019). However, income inequality has risen due to inequitable taxation, including capped social security premiums, regressive indirect taxes, and lower taxation on capital income compared to wages (Rijksoverheid, 2022; van Essen et al., 2022; Vethaak & Jongen, 2024).

European social policy, a relatively recent phenomenon, is considered ‘soft law’, giving member states flexibility in implementation (Eick, 2024b; Hacker, 2023). In the Netherlands, initiatives like the European Digital Innovation Hubs aim to strengthen industrial digitisation, yet other schemes, such as SURE and the RRF, are less adopted due to perceived irrelevance⁵. Despite contributing to SURE⁶, the Netherlands has not utilised these loans. However, it ranks among Europe’s top three digital economies, meeting many Digital Decade Policy targets, with over 80 per cent of its population possessing basic digital skills⁷.

Regarding the EU’s minimum income proposal, the Dutch government asserts its autonomy in interpretation and implementation⁸. Existing programmes, such as the Social Assistance Act, General Old Age Pensions Act, and Supplementary Benefits Act, align with EU recommendations while maintaining flexibility. This reflects a recurring perception that EU social policy does not align well with Dutch needs, resulting in limited participation in such initiatives. Nonetheless, the Netherlands actively engages in skills development, digitalisation strategies, and gender income equality.

Despite a strong labour market, significant challenges remain. Skill shortages, declining educational outcomes (evidenced by low Programme for

⁵ [https://www.eerstekamer.nl/verslagdeel/20210518/goedkeuring_van_het:Behandeling Goedkeuring van het eigenmiddelenbesluit van de Raad van de Europese Unie – Eerste Kamer der Staten-Generaal.](https://www.eerstekamer.nl/verslagdeel/20210518/goedkeuring_van_het:Behandeling_Goedkeuring_van_het_eigenmiddelenbesluit_van_de_Raad_van_de_Europese_Unie_-_Eerste_Kamer_der_Staten-Generaal.)

⁶ https://economy-finance.ec.europa.eu/eu-financial-assistance/sure_en

⁷ <https://www.rijksoverheid.nl/actueel/nieuws/2023/10/24/meer-mkbers-benutten-digitalisering-toegang-tot-gigabitinternet-verbeterd#:~:text=AI%20met%20al%20past%20nu,tot%20tenminste%2075%25%20in%202030>

⁸ <https://zoek.officielebekendmakingen.nl/h-tk-20242025-8-9.html>

International Student Assessment [PISA] scores) (Meelissen et al., 2023), and social disparities persist. Precarious workers, comprising 16 per cent of the population, are especially vulnerable (Vrooman et al., 2023). Migrants form a large part of this group, feeling neglected by national and EU social policies, despite benefitting from regulations like the minimum wage (Eick, 2024b). In other EU countries, lower socio-economic groups tend to support EU social policy more strongly (Baute & Meuleman, 2020; Eick, 2024a). Paradoxically, in the Netherlands, such groups have historically been politically inactive but contributed to the populist surge in the 2023 elections (Ipsos, 2024). These elections emboldened the government to tighten migration controls, including reintroducing border checks, aligning with domestic sentiment but diverging from EU frameworks (Government of the Netherlands, 2024). Restrictive migration policies exacerbate social tensions, straining housing availability and undermining security in vulnerable communities. Policymakers' reluctance to address these issues perpetuates narratives that culturalise problems, disproportionately attributing them to migrants (Vermeij et al., 2024, p. 115). The EU could play a stronger role in advocating for comprehensive migrant integration by establishing clear guidelines and funding for housing, education, and employment initiatives, similar to its approach to fiscal oversight. However, such measures have not materialised.

In conclusion, the EU context seems to have had limited influence on Dutch social policy. The Netherlands remains a corporatist state, even after more than 20 years of politics dominated by liberal parties. On several occasions, these governments tried to shift the rules towards more liberalisation and less public funding for social programmes, but on each of these occasions, Dutch corporatist interventions (i.e. the Polder) were needed to appease societal tensions (Ornstein & Oude Nijhuis, 2020). The main conclusion for the Netherlands is that, even if it is more in line with the social targets of the EPSR than most EU countries, there is no drive to lead a European social policy (Hacker, 2023). Instead, the Netherlands prefers to follow its social policies, which depend on the policymakers in power at any given time and are subject to change.

STEP 2B: NORWAY: BETWEEN NATIONAL SOLUTIONS AND INTERNATIONAL INTERDEPENDENCY

Norway is outside the EU but part of the EEA. This arrangement gives access to the internal market and an obligation to implement most of the regulatory regimes decided by the EU. Still, it leaves the country without formal political EU representation. As such, Norway is aligned with European social policies and influenced by the European Social Charter, which guarantees social rights such as fair working conditions and social security. This promotes some consistency with EU social standards despite Norway's non-membership. The

EU's influence on the social dimension has traditionally been limited and only recently gained significance through the EPSR (Resolution and Report on the Action Plan to Implement the European Pillar of Social Rights, 2021). While this alignment supports convergence in social aspects, economic policies may still diverge due to different governance models, as the Netherlands and Norway perform above the objectives formulated in the EPSR.

Norway resembles the Netherlands in that it is in a group of countries historically referred to as small and medium-sized (nation-)states with well-functioning political, social, and economic structures (Esping-Andersen, 1990). The institutional set-up has enabled various segments of society to seek compromises across historical divides, bringing social rights and welfare to be taken as universal. Yet there are demographic, economic, and institutional differences compared to the Netherlands.

Demographically, Norway is a large but sparsely populated country, while the Netherlands is the opposite, being one of Europe's most densely populated. Economically, the Norwegian business structure is strongly dominated by oil and gas, marine and maritime activities, the abundance of hydroelectric power, and the availability of rich mineral and forest resources. While being an advanced society, these traits contribute to giving the country a parallel imprint of being a frontier economy. In recent decades, the earnings, especially from exporting oil and gas, have made the country a net creditor internationally, putting it in a position of relative freedom of choice for domestic spending. Institutionally, the historical segmentation of Norwegian society differs from the Dutch principle of pillarisation ('*verzuijing*'). In Norway, cultural, political, and economic rifts, often with strong regional anchoring, divide society and must be considered prerequisites for compromises (Rokkan, 1967). Two such arenas for compromises should be mentioned. First, there is the historical compromise between capital and labour made in the 1930s. In 1935, the National Labour Union (LO) signed a general agreement with the National Confederation of Employers (NAF) regulating working life into a terrain of negotiation, often cited as the birth of the Norwegian model, predating the more famous Swedish model by two years (Rokkan, 1967). The same year, a social-democrat government was established after an agreement was reached with the Agrarian Party (Bondepartiet) on a programme introducing many of the themes that would later form the basis of the welfare state model.

Second, the regional dimension is interlinked with social policy. Again, there is a historical backdrop. Norway's business structure varies substantially from one region to another, and this has been the case even more historically. The battle for national political hegemony displays this struggle, broadly speaking, opposing the peripheries to a national centre, often deemed unacquainted with ordinary people's lives and living conditions. Throughout the nineteenth century, the periphery gradually gained parliamentary control, meaning that all

aspects of politics and policy development ever since need to pay attention to the geographical dimension, not least as regards industrial and social policies (Wicken, 2017). The rebuilding of the country following the end of World War II implied an even firmer institutional safeguarding of the periphery (Knudsen, 2018).

Following this, the feature of demographic sparsity applies to all the Nordic countries except Denmark, and this topic was highlighted when Finland, Norway, and Sweden applied for EU membership in the early 1990s. Subsequently, a specifically targeted area for the northern periphery was developed under the structural fund umbrella (Méndez et al., 2006). Other issues were highlighted in the discussion between Norway and the EU, especially related to fisheries, but, in the end, Norway voted “no” to EU membership in 1994. There are several ways to interpret this turn, and one of them is to see the outcome as a trade-off between material and identity-related factors (Gstöhl, 2002). Norway and Switzerland were both in a position where economic arguments did not outpace strong identity-related sentiments against joining the EU, as both countries were not reliant on EU funding for securing national budgets or well-being. On the contrary, the electorate, especially in the Norwegian geographical periphery, held the view that they would be better off without joining. The equation was calculated differently in Finland and Sweden, with their different business structures and economic outlook.

In line with this way of reasoning, it is fair to say that the present discussion in Norway on social convergence and transition is very different from that in other European countries. There is a concern about the interface between the Norwegian labour market and that of the EU, and this debate is mainly related to skill needs and a perceived need for qualified labour within different sectors of the economy (KBU, 2023). Concomitantly, there has been a debate about a possible weakening of the Norwegian work–life model characterised by a comparatively well-paid and highly unionised workforce caused by the influx of migrant workers coming from countries with other traditions. Lately, this debate has become less articulated following the upswing of wage levels in Eastern Europe and a tendency for many of these migrant workers to return to fill vacancies in their countries of origin. The debate about harmonising criteria for skill needs and the regulatory amendments needed to align with the rest of the EU in this respect continues to evolve on a bureaucratic level without stirring much emotion. The debate about harmonising social policies, in general, is almost absent, as the levels of contribution normally lie well above minimum standards in the EU. What is an issue, though, is the transferability of national social payments to people moving to EU countries, permanently or temporarily, be they EU or Norwegian citizens.

The most pressing question raised by the challenges dealt with in this book is the possible consequences of an upcoming trade war between the EU, US,

and China. Norway is not a member of the EU Customs Union and will be severely hit by an abrupt slowdown in economic globalisation as a small, open economy, heavily relying on trade for its earnings and well-being. This was also the message brought forward by the governor of the Norwegian National Bank, Ida Wolden, in her yearly address to the Supervisory Council of the bank on 13 February 2025 (Norges Bank, 2025). Moreover, in doing so, she referenced the late Norwegian economist Victor D Norman (1946–2024), who is considered the inventor of the concept of Norway as a small, open economy gaining from global free trade. The possibility that Norway could profit from playing as a free state in a world of unrest or trade barriers is almost absent from the debate, the only empirical case of such a situation being the boom in shipping during World War I, when Norwegian shipping companies made huge profits as neutral players at the expense of thousands of sailors losing their lives when ships were sunk.

More specifically, a trade war between the EU and the US could put Norway in a difficult position, facing tariffs from both sides. This would be especially problematic if the EU imposes protective tariffs against third countries under World Trade Organization rules. Since the EU is Norway's largest trading partner, the government has argued that the EEA Agreement allows Norway to be included in the EU's Customs Union. More generally, the recent debate in Norway's social system centres on whether the country can sustain its current generous welfare policies in the long run. While Norway boasts a high employment rate among individuals aged 25–55, its workforce participation among those over 55 lags behind the rest of Scandinavia. Adjusting pension rules has garnered broad consensus, but reforms to sick leave policies and permanent social benefits remain contentious (Rolfsen, 2024). These issues are likely to become significant political topics in the years ahead.

There is a debate about whether Norway will see a period of reindustrialisation or not, using its energy resources to meet global demands. However, such reindustrialisation is dependent on exports for it to work. The emerging battery industry illustrates both the case and its dependency on foreign markets. Without inclusion in a coherent EU battery policy, Norwegian initiatives in this sector will struggle to compete (Wardeberg et al., 2024). The worst case would be a trade conflict involving the EU, the US, and China. As a small, open economy outside the EU Customs Union, Norway would then be in the loser's corner.

STEP 3: FORESEEING THE FUTURE OF WORK

The country reports reveal a significant divergence between the objectives of EU policy and national intentions in social policy, given the major transformations. This divergence hinders efforts to address major risks of deglobalisation,

insufficient technological investment, restricted migration for EU citizens, overall welfare, and inequality. A foresight study was conducted to understand these risks and the necessary policy measures to achieve social convergence. Four scenarios were developed using a mixed-method foresight approach. This approach combined quantitative findings from the GI-NI studies on the impact of digital transformation, globalisation, and migration on skills demand and inequality, with desk research, qualitative consultations, and workshops with experts (Boza & Reizer, 2023; Dabed et al., 2024; Kampert et al., 2024; Los et al., 2023b, 2023a; Los & Ye, 2023; Nikolova, 2022; Preenen et al., 2023). The scenarios explore the interaction between varying degrees of digital transformation and globalisation and their impact on welfare, skills demand and inequality. The focus is now on the scenario where both digital transformation and globalisation in the EU and world stall, resulting in an insular and technologically conservative world. This scenario likely indicates the risks for the EU and member states if they do not develop an alternative approach to the major transformations.

BOX 7.1 EXPLAINING THE SCENARIO OF DEGLOBALISATION AND STAGNATING DIGITAL TRANSFORMATION (SEE HULSEGGE ET AL., 2024 FOR A FULL OVERVIEW)

In this scenario, we will likely see reduced cooperation and knowledge exchange between the power blocs: the US, BRICS and the EU, further impeding digital transformation. The slowdown in technological progress diminishes labour productivity and global trade, leading to economic growth deceleration and broader global economic struggles. Escalating national tensions emphasises more focus on sovereignty, decreasing labour migration between blocs and exacerbating polarisation within and across the EU.

Deglobalisation, coupled with less mobility and labour migration, poses further risks to the EU's economy. It could lead to significant labour shortages in key sectors such as healthcare, agriculture, and construction, impacting productivity and economic growth. Additionally, with an ageing population, fewer migrants could exacerbate challenges like increased pressure on pension systems and healthcare services. Migrants also bring diverse skills and perspectives that drive innovation, so reduced migration could limit new skills and ideas, hindering technological and economic advancements.

This scenario suggests that socio-economic inequality may be reduced in the short term within and between countries, with countries within the EU converging temporarily. Technological stagnation and factors like reshoring (reinstating previously outsourced jobs) lead to slightly narrower socio-economic inequalities as they are met with decreasing demand for highly skilled workers. Additionally, Southern and Eastern EU countries may benefit most from reshoring and nearshoring, and stalling digital transformation may allow them to catch up technologically. However, this comes at the cost of generally lower numbers of job opportunities across all skill levels and, most importantly, sustained economic stagnation and potentially even economic contraction.

In the long term, this leads to significant risks of increasing inequalities. The initial reduction in inequality may reverse, leading to more significant disparities. Vulnerable groups, such as low-skilled workers, migrants, and women, will face heightened employment barriers and job insecurity. Reduced economic activity will exacerbate employment barriers, especially for these vulnerable groups. During economic hardship and periods of job scarcity, competition intensifies, potentially resulting in medium-skilled workers displacing lower-skilled workers. Vulnerable groups are exposed to the increased precarity of labour contracts. Multifaceted policy measures are needed to protect these groups and promote economic stability.

With technological growth stagnating, the demand for advanced technology decreases across all education levels. However, changes in global value chains still require workers in specific regions, occupations, and companies to reskill. Economic hardship and strained educational systems will make it difficult for workers to acquire new skills, hindering their ability to adapt to changing job market demands. Comprehensive support systems are essential to guide and equip those at risk, ensuring inclusivity and equity in reskilling initiatives. Economic struggles increase competition for well-paid jobs, benefitting higher-skilled workers with more development opportunities, while lower-skilled workers face limited growth prospects and competitive disadvantages. High-skilled workers experience fewer negative impacts from changing labour market dynamics. It remains crucial for companies to keep up with essential innovations, necessitating the continued need for high-skilled workers. In periods of economic struggle, high-skilled workers may also take over roles traditionally held by medium-skilled workers, exacerbating competition and reducing opportunities for lower-skilled workers, leading to a more polarised labour market. Reforming collective

labour agreements can help maintain productivity and prevent precarious employment.

Promoting innovation and R&D will be essential for economic recovery and growth, which is particularly challenging with reduced labour migration and increasing critical skills gaps. The EU must, in this scenario, find ways to foster innovation internally and effectively leverage existing resources despite reduced openness and limited international collaboration. Supporting companies in adapting to changing business models and market trends is crucial for resilience and competitiveness.

Prolonged economic stagnation could lead to a cycle of reduced investment, lower productivity, and limited job creation. Stabilising labour markets with declining demand requires a comprehensive policy strategy, including rethinking production systems to mitigate supply chain risks and prioritising the production of strategic goods and services. Technological sovereignty, self-reliance, and optimal use of existing technologies are vital for boosting productivity and economic resilience.

The major challenge for the EU in this scenario is to promote innovation and R&D despite reduced openness, limited access to international talent, and restricted knowledge exchange between EU countries and internationally. This challenge is compounded by economic stagnation, which limits available financial resources for investment.

This scenario and its policy implications underscore the enormous challenges posed by deglobalisation combined with stagnating digital transformation for the EU's prosperity and social convergence. The lack of collaboration, knowledge exchange, and limited financial resources exacerbate these challenges. This seems to be a scenario to avoid at all costs.

When we examine the other scenarios, the downsides of this scenario become even clearer. In scenarios where deglobalisation is paired with accelerating digital transformation (the 'Streeck scenario'), or where globalisation continues alongside stagnating digital transformation, we still foresee slow to moderate economic growth and increased welfare. Although the challenge of mitigating inequality and social divergence remains significant in those scenarios as well, the financial resources and opportunities available to address these challenges are more present.

The findings of the scenario study highlight the critical importance of EU collaboration and investing in both digital transformation and international collaboration. Possibly, the EU should develop an alternative to hyperglobalisation that puts too much of a reliance on the US economy (Rodrik, 2019). By fostering its programme for technological advancement (Draghi, 2024)

and maintaining open, cooperative international relationships, the scenarios implicate that the EU will be better able to navigate the complexities of global economic shifts and work towards greater social convergence and economic resilience (see also Schwaag-Serger et al., 2024).

DISCUSSION AND POLICY IMPLICATIONS

The EU has focused significantly on social convergence over the past decade. The EPSR was intended to mark a departure from years of fiscal austerity policies. This social policy aimed to transcend the national focus of social policy in Europe and offer a new perspective for citizens and workers. The various rules have garnered support from social partners and thus seem to embody the European social market model. Continuing Hacker's (2023) analysis, the EPSR appears to combine elements of the corporatist and the (Nordic) social democratic social models. In recent years, with the SURE and RRF instruments, the European Commission has attempted to let the EPSR guide national social investment. However, countries still prioritise their own agendas despite the EPSR's social indicators highlighting clear imbalances in national social policies (Hacker, 2023). The Commission aims for social convergence towards these standards, but the standards do not provide significant triggers for adjustment. The EPSR seems still far from being an instrument to shape European solidarity.

At the same time, this fragile European social policy has come under pressure from several shocks. Technology, globalisation, and migration have pressured policymakers to devise alternative solutions to continue enabling social convergence. Over the past decade, several initiatives have responded to these challenges: SURE, RRF, Year of Skills, and the Migration Pact. European policies seem responsive to these challenges. However, the question remains whether these policies have had a significant impact (Hacker, 2023). Achievements also seem fragile to a large extent. Despite discussions on a 'Just Transition', it remains to be seen whether the achievements of recent years (minimum wage, green transition, CSRD) will receive as much attention in the new European Commission and Parliament. Policymakers are facing unprecedented challenges, including the effects of the recent pandemic and war at the borders.

Does this make social convergence towards greater equality and better skills possible and desirable? Is such convergence feasible? Is European social policy truly taking shape? Can it transcend national borders? Countries seemed to be gradually aligning with the EU policy goals (Eurofound & Mascherini, 2020), but examples from the Netherlands and Norway show an à la carte approach to European social policy. Countries participate when it suits them, not out of European solidarity or an intention to contribute to social convergence (Hacker,

2023). The Norwegian case does indicate that the current international conditions may bring the external members of the EU, somewhat closer to the EU social agenda. Social convergence appears to be coincidental, temporary, and more a consequence of global developments than specific European policies. Thus, the impact of EU social policies on skills and inequality can be considered marginal, although they can provide valuable guidance for member states. Schout and van Riel (2022) indicate that the primary responsibility for convergence lies at the national level and that the quality of institutions plays the most prominent role, which implicitly extends to social policies. They argue that economic policy initiatives, rules, regulations, and oversight at the EU level have been ineffective, underscoring the need to strengthen national institutions. The SURE scheme seemed to initiate a European unemployment compensation scheme, where the EU could 'stabilise' the economy. In practice, the impact of SURE has been very limited. However, the countries that utilise it will eventually have to repay the debts incurred.

Trend analysis shows that European investment funds have not made a significant difference. The main beneficiaries of EU investment funds in Southern and Eastern Europe exhibit different growth patterns. Ireland and Eastern European countries have managed to catch up, while Southern countries continue to lag behind. Further research is needed to explain the differences in convergence and the relationship with public investment (Hacker, 2023; Hermans et al., 2023).

The question remains whether social convergence is desirable and whether we should pursue further social convergence at all. This is where the foresight study and the results noted in Chapter 6 are important. These studies indicate that less technology or globalisation means that social convergence is even less likely. However, even in a scenario of substantial investment, choices remain necessary: the question is whether these choices will work in practice. As Rodrik (2019) warns of convergence towards hyperglobalisation, what constitutes an EU direction is not yet clear. Whether all current actions are appropriate is questionable if we do not know how best to achieve social convergence. There are several elements missing that are needed to achieve social convergence.

A first observation is that, while we consider social convergence important, it is politically challenging to reach a consensus on it. Why is that? First, more discussion on the desired social model is needed. There is talk of the EU being a social market model, but the outline of that model is imprecise. Until such an outline is defined, the different national social models, as described by Esping-Andersen (1990), will continue to coexist. The Netherlands and Norway have different social models (corporatist versus social democratic), yet they score better on EU convergence objectives. Choosing a social model is essential because it clarifies how social conflicts should be resolved. The

European level lacks sufficient instruments to realise political compromises in the social domain. If we examine the development of social models in different member states, they do not significantly change in practice. Furthermore, they are developed in social and political processes throughout history, only partly relying on off-the-shelf models. Only the new member states (e.g., Slovenia) are building new models. However, countries appear reluctant to learn from each other or to be guiding countries. The Netherlands and Norway make little effort to 'export' their models.

A second observation is that we need a different order in the convergence debate. It is tempting to prioritise economic instruments to achieve progress in Europe. This strategy remains central to the European Commission. European leaders (notably Von der Leyen, Draghi, and Lagarde) expressed a preference for creating a unified European capital market. This would give businesses and small and medium-sized enterprises access to more funds and revitalise the European innovation model. The lesson from 2024 Nobel laureates Acemoglu, Robinson, and Johnson (see Chapter 9) is that politics and economics need each other, but political institutions need to counterbalance the economic forces. Creative destruction as an economic mechanism can only work if political institutions can make an economy function, and when social policy measures are in place to cushion the effects of its operations. Democracy is an important precondition, and it is questionable whether the EU meets the conditions of a strong democracy (Mounk, 2018).

The problem with social convergence is that political convergence in Europe has lagged for several decades. This needs to be addressed. A European social model can be developed only when the political model shows progress. Such a European social model should express how we want to shape solidarity at the European level. If the impact of technology, globalisation, and migration continues to be felt in the coming years, it must be clear how we want to address these issues at the European level. Acemoglu's (2024) speech to the Nobel Prize Committee highlighted how technology affects the balance between utility for the 'rich' and the 'poor' in a country. That balance reflects what our social model embodies. We should recognise the influence of technology and other factors (i.e., migration, globalisation) on that balance. As Acemoglu shows, technological transformation can go in several directions. If we want to emphasise the positive impact of technology, we must steer towards that.

A follow-up question is what constitutes an effective social model with a different organisation of solidarity. To achieve European prosperity and social convergence, our analysis indicates that increased, yet carefully guided, globalisation, digitalisation, and migration are crucial. A robust social convergence narrative depends upon effectively addressing the following four key elements:

- Addressing regional differences in models: We should not ignore these social models' obstacles to social convergence. The EU needs to define clearly what type and scale of support it is willing to provide to lagging regions. What support are we prepared to give to lagging regions? The Cohesion funds have had an impact but may not be sufficient to guarantee further convergence. Although convergence is expected in most scenarios, the risk of lagging regions remains high, especially given the challenges posed by deglobalisation and rapid digitalisation.
- Influencing the direction of technology: As Acemoglu (2024) points out, we have opportunities to influence the direction of technology. The question is whether the EU can hold its own in this international debate and sketch an alternative future for hyperglobalisation. The EU AI legislation seems to indicate that it can. This legislation provides the EU with leverage to tackle the practices of global companies, ensuring technology supports, rather than disrupts, social cohesion.
- Targeted mobility and migration for talent: Addressing the EU's talent shortage requires targeted mobility and migration strategies explicitly tailored to sectors experiencing critical skill gaps. Effective policies must prioritise streamlined skill recognition, proactive integration programmes, and close collaboration with employers. Such measures should be accompanied by robust domestic reskilling and upskilling initiatives to avoid exacerbating inequalities and skill mismatches, thereby fostering broader social acceptance, cohesion, and sustainable economic growth. In this way, targeted migration becomes a contributor to social convergence, rather than a cause of fragmentation.
- Quality of work: Rodrik and Sabel (2019) discuss the importance of quality work. The EPSR mentions a healthy, safe, and well-adapted work environment and data protection. However, none of the 20 principles focuses on improving the quality of work within organisations. The design of workplaces largely determines whether employees can manage the impacts of technology. The European Commission does pay attention to the quality of work, as seen in the proposal to make Industry 5.0 central to its industrial policy (Breque et al., 2021). Among other things, work should be 'human-centric'. This principle is not included in the EPSR. If employees and social partners want to manage transformations, more attention is needed for 'human-centric work'. Baldwin (2018) suggests that policies should shift towards creating good quality jobs, mainly in the service sectors, without relying solely on the manufacturing sector, supporting and encouraging firms' participation in global value chains, and focusing on protecting workers rather than jobs. Prioritising the quality of work contributes to social equity and convergence.

Social convergence in Europe can be achievable and desirable, but only if the priorities are right: convergence should first be political, then social, and only then economic, not the other way around. As Acemoglu, Robinson, and Johnson argue, economic integration is insufficient for achieving social and political convergence. European social convergence, therefore, needs a new narrative that enables the EU to find a role in the various transformations central to the GI-NI project. We have identified the elements that make an alternative narrative possible, which can serve as an antidote to populist spin in European and national politics.

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