



**EAPN Key Messages on Active Inclusion  
Round Table on Poverty and Social Exclusion  
Marseilles, 15-16 October 2008**

**Delivering Results on Active Inclusion  
“People experiencing poverty can’t wait!!”**

***8 October 2008***

## Introduction: What EAPN thinks

The Round Table on Poverty and Social Exclusion 2008, is an important opportunity to make real progress on delivering a dynamic integrated active inclusion approach which incorporates the right to adequate income, access to services and to quality, sustainable employment. However, this active inclusion approach needs to be underpinned by the **strongest possible EU instruments** and delivered as **part of the broader EU Social Inclusion** framework if it is to have a chance of impact. Active Inclusion as a concept is not meant to raise all the questions nor provide all the solutions. It is therefore vital that the Commission makes clear **how** the Active Inclusion approach effectively **interacts and reinforces** the OMC on social protection and social inclusion, as suggested in the Commission's proposals on Reinforcing the OMC produced as part of the Renewed Social Agenda<sup>1</sup>.

On the 30<sup>th</sup> September, the Commission has finally **adopted the Recommendation and Communication on Active Inclusion**, following a concerted campaign by EAPN and the Social Platform to prevent the proposed Recommendation being downgraded to another Communication. EAPN strongly welcomes this decision and generally applauds the proposals made in these documents although stresses our concern in relation to the tentativeness of tone, that appears to give more weight to subsidiarity rather than the need to make real progress on high level social standards in the EU.

EAPN is particularly concerned that the Commission's Proposals seem to imply that the **Active Inclusion approach should have no impact in relation to "the application of Community Law, including State Aid rules and Community Rules on the award of public contracts"**. If this approach is adopted, then the Commission has still not understood the debate in relation to the central importance of Services of General Interest, and in particular, social services, and the need for EU rules to respect the specificities of these services.

**Nevertheless, EAPN is now more concerned about action!** We want now to see signs of real political will to **implement** the Active Inclusion strategy **ensuring that it makes a real impact on the worsening problems of poverty and social exclusion.**

In the current context of **deepening financial and economic crisis**, our members and networks are angry about the mismanagement of financial institutions reflecting the dangers of the current de-regularised financial and economic model and deeply concerned about the likely impact on the most vulnerable victims: people experiencing poverty and social exclusion. The current crisis also reflects the extraordinary lack of political accountability, intervention or control by democratic institutions over the dominant economic interests. In this context, the commitment to an energetic implementation of a positive active inclusion strategy as part of a broader vision of social and democratic Europe, becomes even more urgent. A demand to guarantee fundamental rights through active good governance, ensuring the right to adequate income, access to affordable quality services and genuine support to access decent jobs must be the common understanding of the active inclusion approach.

*We urge the Commission and the Council of Ministers to take this responsibility seriously, and urgently drive forward the effective implementation of active inclusion based on fundamental rights through a revitalized social OMC and as part of a new social and sustainable vision for the EU.*

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<sup>1</sup> Commission's Proposals: Reinforcing the OMC>

## What is needed

In June, EAPN developed its shadow principals for a positive active inclusion approach, through the EAPN seminar held in Paris in June 2008<sup>2</sup>. In this document we set out how we think the principals need to be implemented.

### EAPN Key Messages on Implementing Active Inclusion

- 1) **A Strong Political Vision and Message communicated effectively** - defending the rights of people experiencing poverty to adequate income, to access services and quality employment.
- 2) **Three indivisible pillars – starting from adequate income** – adequate income, access to affordable quality services and genuine support to access decent jobs – building from the secure base of an adequate income.
- 3) **A concrete Road Map for implementation of Active Inclusion based on participation** – specifying how active inclusion will be implemented and monitored through the social OMC
- 4) **Funding for bottom-up approaches** – confirming how Structural Funds will be used to support innovative grass-roots initiatives to promote active inclusion, as well as through other funding streams.
- 5) **Coherent social and economic approaches to inclusion – ensuring that active inclusion is effectively mainstreamed** through the Lisbon Strategy, notably the European Employment Strategy and through the follow-up to renewed social agenda – putting social and sustainability at the heart of the post 2010 agenda.

#### 1. A strong political vision and message, effectively communicated

- The strength of the active inclusion approach comes from its **integrated approach** to supporting social inclusion and its recognition that it must link to the broader social inclusion framework, based on a rights approach. This approach needs to be promoted and explained at all levels so that it is clearly understood. As was highlighted at the EAPN seminar on Active Inclusion in June: “*Governments have to be persuaded that investment in Active Inclusion is not a cost but a benefit for society*”<sup>4</sup> as well as recognizing the greater cost of *not* taking action. The Commission needs to invest time and resources into promoting such a vision of Active Inclusion, and to support Member States to do the same at national level.
- This message needs to highlight the **added value of Active Inclusion** and challenge the current assumptions of the legitimacy of narrower, work-fare focussed active labour market measures. Above all, it needs to defend urgent action to deal with the increasing threat of growing levels of poverty and social exclusion. Active inclusion must be converted into a key pro-active tool capable of giving people the security they need, meeting the challenges of economic insecurity and recession, and preventing more people from falling into poverty.

#### 2. Three indivisible pillars – starting from adequate income.

- **Three integrated pillars of active inclusion** are crucial. To deal only with income and access to work, is to treat poverty and social exclusion as a purely monetary problem. The commitment

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<sup>2</sup> See EAPN Report: Yes to Active Inclusion. Report of EAPN Seminar, Paris June 2008

<sup>4</sup>

to strategies that challenge the multidimensionality of poverty based on fundamental rights, including access to services, is a basic tenet of the EU social inclusion strategy and must be reflected in the implementation of the Active Inclusion strategy.

- **Adequate income as the cornerstone.** Only by providing sufficient income for a dignified life can people be provided with a secure base to look for work or further social integration. The current economic crisis linked to astronomical rises in energy/housing and food prices, the impact of the credit-squeeze on low-income house owners and on people in debt, as well as the likely impact of loss of jobs and lower wages, demands an energetic affirmation by the EU to guarantee adequate income as a social right, and a crucial pre-requisite to accessing work. Any assessment of adequacy must be linked to current purchasing power based on real household scenarios, not on theoretical models. To be effective these must be rooted in a participative governance process.<sup>5</sup>
- An integrated approach needs to be delivered through **integrated structures and mechanisms**. Priority should be given to developing effective people-focussed one-stop shops which provide support for inclusion. These centres should provide **independent, integrated support ensuring that people's basic needs** are met – ie ensuring that adequate income and access to services is assured while providing personalized *pathway* support either into training, education, useful activity or work. Such one-stop shops however, will need to respect the dignity and choice of the people concerned and cannot be driven by the objective of making it easier to pressure people receiving benefits to accept any job, at whatever price. Clear advice must be given on how to support people who cannot access employment or for whom work is not a realistic possibility, by providing pathways to meaning activity, without the threat of reduced or cut benefits hanging over their heads.
- Integrated services must be based on **respecting people's fundamental rights to income, services and work** and "*ensuring that people experiencing poverty and social inclusion are treated with respect for their dignity and are not blamed*."<sup>6</sup> For most NGO non-for profit services, this type of approach is the starting point for the provision of supportive social services. NGO providers should be recognized as pioneers in rights-based social service provision, their value-added recognized, valued and explicitly supported. This should include better promotion and implementation of the EU provisions on public procurement to ensure that public funders adequately prioritise quality delivery over low costs.
- **A clearer link must be made between active inclusion strategies and discrimination**, recognizing that not all discrimination grounds are legally protected in the same way at EU and national level. Although reference is made in the Recommendation to equal opportunities for service users and employees with "*due account taken of the diversity of users*", this is not an adequate recognition of the specific discriminatory barriers faced by specific groups. More emphasis must be given to clarifying terminology and methodology ie unclear references to migrants/ ethnic minorities and other groups, recognition of the specific realities and obstacles faced by different groups and the impact of multiple disadvantage (ie older migrants, Roma women etc.).
- **Access to quality and sustainable employment** cannot also be left as an add on but will require deliberate job-creation, actions to ensure living wages and quality working conditions. In

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<sup>5</sup> See EAPN Report – Social Standards: [www.eapn.ie](http://www.eapn.ie)

<sup>6</sup> EAPN Report on Active Inclusion seminar June 2008.

the new economic context it will be even more crucial that work provides a real route out of poverty. This means developing mechanisms, together with social partners, to guarantee minimum wages which provide a living wage, work and skill progression routes. It also means a determination to outlaw precarious work whilst supporting people in the informal economy to regularize their situation. Social economy and other forms of supported work clearly provide a strong potential model for helping those furthest from the labour market into decent work and must be specifically supported.

- **Be honest about full employment** – the EU must also recognize that there are not currently sufficient quality jobs in the labour market for everyone. The current focus on supply side solutions cannot deliver this goal. The labour market is not absorbing everybody who would like and is able to work. The economic downturn is also likely to impact negatively on the number and quality of jobs. Other solutions must therefore be found to reinforce the right to decent work through effective job creation, and inclusive entrepreneurship, reduction in working time and by supporting people along the road to work and into other forms of social integration.
- **Delivering the right to access affordable, quality services**  
The Recommendation's proposals on services, are less ambitious than is necessary to fully respect the importance of Services of General Interest and social services in the Active Inclusion approach. At times, they appear to prioritise concerns about budgetary constraints and subsidiarity, rather than underlining the Commission's stated commitment to strengthen the rights approach to services and to support the development of necessary social standards. The focus on "appropriate" social support, is open to many interpretations and reinforces a functional view that the only important services are those which are seen as essential for supporting social and economic inclusion, rather than defending a universal right to all services of general interest. **Affordability and accessibility, as well as the need to address emergency situations** need to be emphasized as a central pre-requisite at the heart of the approach to services if the active inclusion approach is to have any chance of a real effect on exclusion and poverty. Getting the people who use the services involved in evaluating these services is also vital, as well as those who are currently excluded and face discrimination . This means a commitment to move beyond standard consumer satisfaction approaches in order to develop on-going structured dialogue and a more active multi-stakeholder partnership approach including users and people in poverty, that is embedded in the delivery of local community services.

### **3. Concrete Road Map for implementing Active Inclusion through the OMC.**

A clear, detailed road map is needed which sets out **how and when** the Active Inclusion strategy will deliver on its objectives, be implemented and monitored through the OMC and driven by active participation of stakeholders including people experiencing poverty.

#### **a) Agreeing on a common vision, principles and objectives**

A strong commitment should be made by each Member State on the content of the three areas and the agreed common principles, overarching vision and objectives. EAPN expects Ministers to make an explicit declaration to this effect and to ensure that the Active Inclusion approach and goals are central to the Spring Council Conclusions 2009 as well as a core element to a new commitment delivered by Heads of State and Governments in their pronouncements on their post 2010 vision.

#### **b) Establishing core EU standards for each strand**

The EU needs to move forward on agreeing common social standards for each strand.<sup>7</sup> This will need an active stakeholder debate on both the content and method for establishing standards. To deliver on this goal, more mutual learning needs to be carried out on the best methodologies and tools. EAPN would like to see support given to some of the proposals developed in the transnational project funded under the Community Programme “Towards an EU initiative on social standards”. This project involved several EAPN networks<sup>8</sup> and proposed methodologies for establishing and monitoring social standards of adequate income as a participative standard-setting process, involving focus groups reflecting the general population of the member state and including people in poverty. These groups would identify the key elements that can provide for an adequate income for a dignified life, and regularly monitor the changing conditions and impact, as a complement to other standard-setting mechanisms.

#### **c) Developing specific indicators to monitor progress**

Indicators will need to be developed which will monitor not only the delivery on the different pillars (ie adequacy, coverage, efficiency of adequate minimum income support.) but on the degree to which an integrated service is delivered and is effective in reducing poverty and social exclusion. The data collection must be disaggregated by ethnicity, gender and other key groups in order to analyse the impact of the strategy on specific target groups and those facing multiple discrimination.

#### **d) Priority Targets**

It is vital to agree priority targets which can be evaluated to judge the effectiveness of the strategy. These should link directly to the targets proposed for the EU social inclusion strategy,<sup>9</sup> making clear how the active inclusion strategy is a tool to deliver on these goals. These should include:

- Implementation of new adequate minimum income levels and impact on poverty
- Impact on working poverty and employment
- Increase in delivery/access to key services (eg childcare/housing/health/education)

#### **e) High profile launch and follow up of strategy and road map**

The Active Inclusion strategy, based on the Commission Recommendation and delivered through the social OMC, needs a high profile launch. This should involve the Council, the Commission and Parliament – setting out the overarching vision, the broad aims of the strategy, what it will achieve and by when. This needs to be echoed by similar events at national level, including debates in the European and National Parliaments. An equally high profile event should be organized in 2010 to assess the progress made.

#### **f) Embed the Active Inclusion strategy in the National Action Plans Inclusion and the National Strategic Reports on social protection and social inclusion cycle**

The strategy must be delivered through the National Action Plans for Inclusion and the Strategic Reports, if it is to get ownership, visibility and real policy impact. As the strategy has missed the boat on the current round of National Strategic Reports and Member States have made no commitment to yearly reporting, there will be a need for a specific reporting cycle linked to the

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<sup>7</sup> Resolution agreed in the EAPN General Assembly, Bulgaria 2008 on the need to advocate

<sup>8</sup> See [www.eapn.ie](http://www.eapn.ie)

<sup>9</sup> See “ A Stronger OMC, but not enough to make the difference”. EAPN Response and proposals for reinforcing the OMC. 18 September 2008. [www.eapn.eu](http://www.eapn.eu).

implementation of the Active Inclusion Recommendation commencing in 2009, backed by a specific detailed Commission Guidance Note.

**g) Actively promote Regional and National Action Plans**

The success of the strategy will depend on effective regional and local input and implementation. This is an important chance for Member States to encourage regions and local authorities to promote detailed discussions with all stakeholders on the implementation of active inclusion, as part of a regional or local action planning process on social inclusion which can feed into the Strategic Reports evaluation.

**h) Use Active Inclusion to dynamise participation in the OMC**

This is also an opportunity to use the focus on Active Inclusion to implement properly the 2008 Guidance Note's proposals on participation and governance in the OMC. This means going beyond consultation and promoting quality active participation and partnership approaches. **The long-term aim should be to develop a "joint approach to active inclusion"**, through on-going structured dialogue with the people who are most affected - people experiencing poverty together with the NGO's and Trade Unions that support them, as well as other key stakeholders in the public and private sectors in the design of policies as well as their implementation and evaluation.

**i) Embed participative mutual learning/peer review exchange at all levels**

A dynamic exchange will be needed between Member States to capitalize on successful approaches and to analyse together common problems and solutions. Building on the success of the EU Peer Review process, new forum's need to be established at national and EU level involving a broader range of stakeholders and ensuring more effective mutual learning at national and EU level. In these forums, NGO's and people experiencing poverty will need to be actively involved—both in terms of their input/assessment of the approaches/programmes, but also to provide direct learning from grass-roots initiatives which they are involved in, as positive examples of bottom-up social innovation.

**j) Ensure specific section in EU Joint Report and Social Situation Report**

The Commission must ensure that all the tools available are engaged effectively in the monitoring process. The social situation report should provide an independent assessment of the delivery on the key indicators. The Independent Experts should be equally involved. The Joint Report on Social Protection and Social Inclusion will need to establish a specific scoreboard – to evaluate progress and delivery on both the content and the process, linked to the Guidance Note Proposals.

**k) Recommendations – and Follow up**

The Active Inclusion Strategy needs to have teeth. This means utilizing the scoreboard mechanism, evaluating and publicizing progress and for the Commission to be able to propose specific recommendations and points to watch to highlight member states performance.

## **4. Funding for bottom-up approaches**

- Active Inclusion should be seen as a **crucial tactical tool** to open up the discussion on how Structural Funds are used and as a specific focus<sup>10</sup> to deliver better on social inclusion, focusing in particular on the funds which have been targetted for social inclusion as part of the Lisbon ear-marking. This would help to challenge the current very narrow view of the labour market and activation approaches currently pursued through structural funds which fail to take

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<sup>10</sup> See EAPN Report – Yes to an Active Inclusion based on rights!

on board the needs of people furthest from the labour market. It would also enable a necessary reflection on the current tendency to marginalize NGO's in the use of structural funds, despite their crucial role in delivering active inclusion policies. The 12.4% earmarking for social inclusion in the overall Lisbon earmarking of 349 billion Euros should be the main focus. This will require an integrated strategy of interdepartmental cooperation and active stakeholder involvement, to establish guidelines and monitor delivery on this objective, in cooperation with managing authorities and intermediary bodies

- The new focus on **social experimentation and social innovation** needs to be linked to a commitment to EU funding for bottom-up initiatives in this field. With the loss of EQUAL, it will be vital that a strong message is sent to Structural Funds managing authorities, stressing that the EU expects Active Inclusion to be delivered through ESF. There is a need to establish clear criteria for the support of grass-roots initiatives as well as government proposals to deliver on active inclusion. A Community of Practice on Active Inclusion could be set up to support this approach.
- The Commission will need to support NGO's **access to public financing at EU and national level**, if Active Inclusion is to mobilize the vital resources, innovatory approaches and commitment of NGO's projects and services.

## 5. Ensuring effective mainstreaming of Active Inclusion

Active Inclusion cannot remain in the domain only of the Social OMC. Clear strategies, tools and instruments must be developed which enable the strategy to impact across all major policy fields.

- **Supporting a much better articulation with the revised Lisbon strategy** through:
  - Specific guidance and monitoring in the National Reform Programmes (NRP) implementation reports.
  - Review of the degree of impact in the NRP and delivery on positive active inclusion in the National Strategic Reports and the Joint Report on Social Protection and Social Inclusion
  - A systematic assessment of other major policy drivers which impact on the delivery of the Active Inclusion strategy – eg the OMC on Education and Training, the impact of Internal Market etc.
- **Ensuring that Active Inclusion is taken on specifically in employment policies** through:
  - The updating of next years Employment Guidelines, to specify more clearly the full vision of active inclusion.
  - A specific focus to be devoted to the social impact of activation – monitored in the Cambridge Review.
  - The National Action Plans for Employment should make clear how national employment policies contribute to the implementation of the Employment Pillar of Active Inclusion.
  - The discussion on how employment policies contribute to Active Inclusion should involve people experiencing poverty and organizations representing their interests, at national level, when shaping the National Action Plans for Employment as part of the National Reform Programme, as well as at EU level.
  - The Employment Committee should actively consult with anti-poverty and social NGO's as to how to develop this process.
  - The Mutual Learning programmes should devote particular attention to Active Inclusion implementation in 2009 and 10.
  - Develop specific support to social economy.

- **A new coherent social and sustainable vision for post 2010**

The Active Inclusion strategy must also be seen as part of a more ambitious social agenda. The European Year for Combating Poverty and Social Exclusion in 2010 will mark the start of a new “post-Lisbon” strategy. We expect to see a stronger commitment from member states and EU institutions to a new overall strategy, with social inclusion as a main objective and fixing concrete targets to eradicate poverty by 2020. Such a social and sustainable vision could be a new Lisbon strategy which includes 4 equal and integrated pillars dedicated to economic growth, employment, social cohesion and environmental sustainability. The Active Inclusion strategy will only be effective if it forms part of this revitalized, more coherent vision for a Social Europe.

### **For more information on EAPN Publications**

- For all publications on active inclusion see our website: [www.eapn.eu](http://www.eapn.eu)
- [See EAPN Network News on Adequate Income.](#)
- [“Yes to an Active Inclusion based on rights!” Promoting EAPN Principles on Active Inclusion – Report of EAPN seminar on Active Inclusion, held in Paris on 13 June 2008.\(includes EAPN principals on Active Inclusion\)](#)
- [A Stronger OMC, but not enough to make the difference!, EAPN Response and Proposals for Reinforcing the OMC, 16 September 2008](#)

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