

## **EAPN Policy Briefing # 26**

**July/August 2009**

### **Foreword**

Dear members,

This is our last policy briefing before the summer. The new European Parliament held its inaugural session in Strasbourg on the 14-16 July and welcomed President Barroso to speak. However, he was not able to make his vision speech as planned, as the Parliament has postponed his confirmation as President until after the 2<sup>nd</sup> Irish Referendum on the 2<sup>nd</sup> of October and the German Elections – A sign of resistance from a new Parliament keen to flex its muscles, even if the result is likely to be the same. The low voting rates reflects a waning of credibility for the European Parliament and a shift to the right, with the worrying development of extreme right groupings including the racist BNP from the UK. However, the Greens have also come back in force. We have high hopes, nevertheless of a more dynamic Parliament which can do its best to challenge the current paradigm of “Growth and Jobs” as we move into 2010.

On the 12<sup>th</sup> of July, the Swedish Presidency set out its priorities for the Presidency: the economic crisis, climate change and institutional issues (the Stockholm Programme – which sets out proposals on citizenship, justice, security, asylum and immigration for the next 5 years (2010 – 2014). It will give a stronger focus to unemployment and access to employment, particularly for young people and work on the post 2010 strategy. We hope that Sweden will also use the Presidency to champion their still strong universal services and minimum income model to insist on integrated Active Inclusion and anti-poverty approaches, giving support to a proper stakeholder debate on post 2010.

From the EAPN perspective it's been a busy period. The very successful General Assembly in Vienna marked the last of the 3 EAPN conferences organized since the middle of May. The Final Declaration strongly supported the amended EAPN Position on post 2010: An EU we can Trust. EAPN has been continuing to lobby on this, with letters to President Barroso and the new EP Party Group leaders. The Spring Alliance (bringing together EEB, ETUC and the Social Platform) held a further conference and finalised on the 12 July its manifesto for people and planet first. The launch will be held on the 28<sup>th</sup> September.

Finally, the EAPN Policy Team and the Secretariat wish to thank you all for all your hard work this year, and wish you a very good and restful summer.

See you in the Autumn.

Sian Jones, Policy Coordinator

Note:

Policy Briefings aim at giving EAPN members on each area of EAPN Policy Work:

- Background information
- Latest policy developments and ideas for EAPN action

All EAPN documents, reports, position papers can be accessed on the EAPN website [www.eapn.eu](http://www.eapn.eu) Publications section. Information on each area of EAPN Working Groups is also available in EAPN Members' Room.

**This tool is meant to make it easy for members to engage in EAPN policy work.** For any comment or suggestion of improvement, please contact Sian Jones at [sian.jones@eapn.eu](mailto:sian.jones@eapn.eu) or by telephone on 00 32 226 5859

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## 1. 2010 YEAR OF COMBATING POVERTY AND SOCIAL EXCLUSION

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EAPN group in charge: EXCO

### It is up to you! What you can do

At this stage, National Networks are encouraged to continue national preparations, such as:

- **Familiarise yourselves with the national programme for EY 2010.**
- **Dialogue with the National Implementing Body to make sure that NGOs can contribute to and benefit from the opportunities presented by the Year, including access to funding within available within the national programmes.**
- **Plan activities for the national focus week in your country, in collaboration with other stakeholders.**
- **Identify journalists and other media contacts who would be willing to work with you during 2010**
- **Contact other NGOs to see what are their plans, generate knowledge about the Year and discuss possible common actions.**
- **Start planning political outcomes - it is crucial to start defining in advance what your expectations are for the year (such as new law, programme, political commitment, new body?).**
- **Start planning participation of people experiencing poverty, which should be a key feature of the Year.**
- **Try to think of possible projects and contact project promoters: even if projects will be selected through open calls, chances are always higher if planned in advance.**
- **It is also possible to start contacting larger institutions (such as media, museums, theatres, schools) to plan other thematic activities, which might be financed from other sources than the more “official” framework for the Year.**
- **And finally, do send information on the activities you are preparing for the Year to the EAPN Secretariat, so that other networks can get inspiration from what you are doing.**

### For information – latest developments

#### National Implementing Bodies

Most countries have appointed their NIBs (National Implementing Bodies) and many of these have prepared the national programmes and submitted them to the European Commission. A small number remain to be submitted, and some have been approved by the European Commission.

Once approved by the European Commission, NIBs may issue calls for proposals/projects. We know that in some countries (informal) agreement has already been made between NGOs and NIBs on the type of projects likely to be funded under the programme. In all cases the calls for tender are subject to the usual Commission criteria, of eligibility, co finance etc, though some member states may chose to increase their co financing contribution thus reducing the amounts to be contributed by NGOs.

*If you have any specific concerns in relation to the NIB in your country or the way the Year is taking shape, you can also contact the civil servant responsible for your country in the European Commission Task force for the Year 2010, headed by Anne Degrand-Guillaud in DG Employment Unit E2. Please find the names of the members of the Task Force, and the countries for which they are responsible, as below:*

Group 1	Group	Group	Group	Group	Group
Nicole Hubert	Antoine Saint-Denis	Christine Kotarachs	Jevgenija Muhina	Anne Degrand-Guillaud	Elodie Fazi
AT	FR	EL	BG	ES	DK
BE	SE	CY	EE	HU	SK
DE	PL	CZ	FI	IE	IT
LU		NL	LV	MT	NO
SL			LT	UK	IS
RO			PT		LI

### Communication strategy

The European Commission has completed the process of contracting the agency, [Mostra](#), that will be in charge of the official communication around the Year. The agency will be responsible for creating visibility at national and European level, including creation of posters, setting up of a web site in all languages, creating a network of national journalist to work with for the Year. The agency will also be providing technical support to each of the Member States: providing media crew to cover events, support to create websites, organising press conferences, etc. A link to the Year can be found [here](#).

It is important that the communication strategy also gives visibility to the work and perspectives of organisations working on the ground, and with this in mind EAPN has now met with the communications agency, along with representatives from three members of the EY Steering Group, and is now awaiting clarification on criteria for selection of an NGO advisory board for the Year and for the selection of EY 'Ambassadors', the Media conference (programme and participation), journalists' contacts, and what kind of practical support could be available for EY activities.

### Consultation

The European Commission is responsible for coordinating and implementing the activities for the Year. A **Consultative Committee** has been set up including representatives of all the National Implementing Bodies. This committee met on 17 April for an information exchange. Two NGO representatives were invited to participate in part of this meeting. The next meeting of this Committee will take place on 8 October 2009. An **EU Stakeholders Group**, entailing representation from EU level NGOs, regional and local authorities, social partners, EU agencies, international organisations, foundations and think tanks, met on 3 March. The next meeting of this group will take place on 17 September 2009.

**The main activities planned by the European Commission are:**

▪ **Media event 29 October 2009**

Around 400 participants, mainly journalists and media stakeholders, will be invited for a one day conference to reflect and discuss on how poverty is perceived and described, and what role media have in counteracting stereotypes and combating poverty, and what the opportunities are in 2010 in terms of media and visibility.

- **Opening event 21 January 2010 in Madrid** (co-organised with the Spanish Presidency). We have not seen any draft programme yet.

▪ **Journalist competition**

The idea is that there will be a national selection and then a European prize for the 'best' ones. There is no clarity yet on the criteria and process.

▪ **Art exhibition**

The European Commission is hoping to gather artistic collaborative projects (people experiencing poverty working together with professional artists) from Member State level. The desired result is an exhibition at the closing event of the Year.

▪ **European Spring focus week 2010** (Idea picked up from EAPN.)

EAPN has asked the Commission **and the NIBs** to join and support in the idea of a week or 24 hrs of broadcasting on Poverty during this first week. Moreover, the 9th meeting of People Experiencing Poverty is planned to take place during the spring EU focus week.

▪ **European Autumn focus week 2010** (Idea picked up from EAPN.)

The week will take place around the International Day against Poverty, 17 October. **The aim is to organise activities in Brussels, to create pressure and have an impact on the political outcomes of the Year. In particular we are planning to organize a *human ring* around the EU institutions during this week, possibly on October 12<sup>th</sup>, still to be confirmed.**

▪ **Closing event** (co-organised with the Belgian EU presidency)

The idea is that there will be a political declaration and commitment from the 27 Member States to renew EU level efforts to combat poverty and social exclusion. **EAPN and its colleagues within the EY NGO coalition are working to see how to influence this declaration.**

### **The other EU Institutions**

**At this moment there is little information on what the *European Parliament*, the *Economic and Social Committee*, or the *Committee of Regions* will do for the Year. However, EAPN together with the coalition of NGOs at European level will be seeking support and partnership with all these institutions in order to create visibility and momentum for the Year.**

<b>EAPN Activities</b>
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- **The EAPN June seminar bringing together key EAPN working groups, focusing on the political legacy for 2010 was an important occasion to shape the EAPN messages and demands for precise political outcomes of the Year – both for the national levels and for the European levels.**

The June 2009 General Assembly also gave a strong focus on preparation

- EAPN Europe is continuing to coordinate a broader NGO coalition at European level. The ‘NGO Steering group’ that includes 8 European level organisations, meets every month. A broader NGO Contact Group, involving over 40 EU networks, meets every three months. The next meeting of this Group will take place on September 14 2009. The key elements and planned activities of the cooperation are:

- **Formulating common political messages and demands for the Year**  
In addition to individual and more precise demands that each network might be having, we are aiming to have a shared set of political messages that could be supported by a broad coalition of NGOs. We expect that these should be agreed in early autumn (September 2009).

- **Supporting our national networks**  
Giving support and motivation to national level actors to get involved, and ensuring visibility to national level work and actions, in particular around the National Focus Weeks.

- **Developing a shared web site**  
The initial work has started to create a web platform for the Year that can give visibility to all the NGO activities going on, but also to the situation in each country and the demands for action put forward. The aim is to launch the web site in October 2009.

- **European Spring focus week (May)**  
The aim is that the spring week would focus on raising awareness and giving visibility to the situation of poverty in Europe, through mainly giving visibility to national levels. In order to create a link, the idea is to promote 24hrs (or 12hrs) of *broadcasting*. We will try to mobilize community media as well as public broadcasting and private press to talk about poverty and social exclusion at the ‘same time’.

- **European Autumn focus week (October)**  
The aim is to organise activities in Brussels, to create pressure and *have an impact on the political outcomes* of the Year. In particular we are planning to organize a *human ring* around the EU institutions during this week, possibly on October 12<sup>th</sup>, still to be confirmed.

### National networks

National Networks are already getting active around the Year, **and many** have already been consulted as part of the National Advisory Groups, started defining activities and projects.

**National Focus weeks:** Almost all national networks have indicated the dates for their national focus week. Some countries are still missing. We are trying to promote the idea that the NIBs should support activities during this week.

Update of the planned National Focus Weeks (as at 24/06/2009).

Date	Country	Date	Country
1) Jan 4-10		27) Jul 5-11	
2) Jan 11-17		28) Jul 12-18	

3) Jan 18-24		29) Jul 19-25	
4) Jan 25- 31		30) Jul 26-Aug 1	
5) Feb 1-7	Ireland	31) Aug 2-8	
6) Feb 8-14		32) Aug 9-15	
7) Feb 15-21	Romania	33) Aug 16-21	
8) Feb 22-28	Austria	34) Aug 22-28	
9) Mar 1-7	<i>Hungary /France</i>	35) Aug 29- Sep 5	
10) Mar 8-14	Slovenia	36) Sep 6-12	
11) Mar 15-21	Luxembourg	37) Sep 13-19	Lithuania
12) Mar 22-28		38) Sep 20-26	Belgium
13) Mar 29- Apr 4		39) Sep 27-Oct 3	United Kingdom
14) Apr 5-11	Malta	40) Oct 4-10	Portugal
15) Apr 12-18	Czech Republic	41) Oct 11-17	EU Focus Week (tbc)
16) Apr 19-25	Slovakia	42) Oct 18-24	Cyprus
17) Apr 26- May 2		43) Oct 25-31	Sweden
18) May 3-9		44) Nov 1-7	Denmark
19) May 10-16		45) Nov 8-14	Greece
20) May 17-23		46) Nov 15-21	Italy
21) May 24-30	EU week	47) Nov 22-28	Finland
22) May 31-Jun 6	Spain	48) Nov 29-Dec 5	
23) Jun 7-13		49) Dec 6-12	
24) Jun 14-20	Poland	50) Dec 13-19	
25) Jun 21-27	Germany	51) Dec 20-26	
26) Jun 28- Jul 4		52) Dec 27-Jan 2	

**Still to confirm: Bulgaria, Netherlands and Norway**

**The EAPN Executive Committee has agreed that each national network would work towards:**

- The organisation of *one national event* during their respective focus week (seminar, roundtable, meeting of PEP, direct action, ...etc)
- To produce some *basic national information* in relation to poverty and social exclusion. In a few weeks we will be fixing a timeline and also providing a template for this providing the more general outline.

### **Background information**

Following a campaign supported by EAPN, 2010 has been proposed as the EU Year for Combating Poverty and Social Exclusion. Yet this is far from being the first European Year dedicated to a specific cause: many NGOs have already been involved with previous ones, such as the 1997 Year against racism, 2003 Year of people with disabilities, or 2007 Year of Equal Opportunities for all.

Aiming primarily at raising awareness and launching public debates, these Years also led to major political developments, such as the Directive on the fight against racism at the workplace. Building on the experience of previous EU Year, it can therefore be expected that 2010 will lead to:

- Better dialogue with government and public authorities – especially in those countries where civil dialogue is still lacking or in development
- Strengthened political commitment – new measures or more visible political commitment to the fight against poverty

- Better awareness of the reality of poverty – questioning of stereotypes and stigmatization of people in poverty, but also questioning of the causes of poverty
- Funding for projects and activities – from the local to the national level
- Alliances and coalitions, with NGOs and others.

### **Main contacts**

#### European Commission

- Anne Degrand-Guillaud, Coordinator of the 2010 Task Force, Inclusion Unit (EMPL E2), [Anne.Degrad@ec.europa.eu](mailto:Anne.Degrad@ec.europa.eu), +(32) 2 296031
- Elodie Fazi, member of the 2010 Task Force, Policy Officer - European Year 2010 for combating Poverty and Social Exclusion, [elodie.fazi@ec.europa.eu](mailto:elodie.fazi@ec.europa.eu), +(32)2 2964406

#### In the Member States

The National Implementing Body (NIB) is central to the process and will coordinate activities at national level. Please contact the EAPN secretariat if you don't have the contact details of your NIB..

### **Background resources and documents**

The **Decision establishing the Year**, adopted in October 2008, can be found in English by clicking [here](#). To see it in all EU languages, please click on [your language on the official journal website](#), and select the relevant decision (Decision No 1098/2008/EC).

The **Strategic Framework Document** adopted in November 2008 (guidelines for Member States) can be found in all EU languages by clicking on the links: [BG](#), [CS](#), [DA](#), [DE](#), [EL](#), [EN](#), [ES](#), [ET](#), [FI](#), [FR](#), [HU](#), [IT](#), [LT](#), [LV](#), [MT](#), [NL](#), [PL](#), [PT](#), [RO](#), [SK](#), [SL](#), [SV](#)

[EU webpage on 2010](#) (to be soon replaced by [www.2010againstpoverty.ec.europa.eu](http://www.2010againstpoverty.ec.europa.eu))

Special [Euro barometer 279 - Poverty and exclusion](#) - September 2007 (What the European citizens think about poverty and exclusion)

### **EAPN key positions and past action**

The 2010 Year will be all the more special for EAPN as the idea emerged from our network, and as 2010 will mark the deadline the EU set itself to make a decisive impact on the eradication of poverty. For more detailed information on the background of the Year and possible actions, please refer to the [TOOLKIT which has been developed in this purpose and has been updated in January 2009](#).

## **2. OMC ON SOCIAL PROTECTION AND SOCIAL INCLUSION**

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EAPN group in charge:	Social Inclusion Working Group

**It is up to you!!! What you can do.**

- Register and participate in EAPN Social Inclusion Working Group Meeting and EAPN Denmark's Seminar on 2010, to be held in Copenhagen on the 12/13 and 14<sup>th</sup> November.
- Respond to the Questionnaire on the social impact of the crisis by the 4<sup>th</sup> September.
- Respond to the Questionnaire evaluating the Lisbon Implementation Reports on the Crisis by the 31<sup>st</sup> October.
- Contact your SPC and government representations to give your input on the crisis and on the thematic year.
- Check the calendar of Peer Reviews to see if you can ask to participate as part of your country delegation.

**For information – latest policy developments**

**Social Impact of the Economic Crisis.**

At the SPC meeting on the 1 and 2 July, a roadmap and skeleton was agreed for the 2<sup>nd</sup> monitoring report on the social impact. The questionnaire will be completed by Member States between the 22<sup>nd</sup> September and 12<sup>th</sup> October. The draft joint SPC/COM Monitoring report will be presented in the SPC meeting on the 21 October and adopted on the 10<sup>th</sup> November. This will also form a chapter of the Joint Report 2010.

April 2009 - The SPC has published its [assessment of the social impact of the crisis and policy responses](#) as part of its contribution to the EU's deliberations on the crisis. The assessment analyses the impact in 4 areas: 1) labour market, 2) Income support, 3) measures to mitigate financial crisis on households and 4) investments in social and health infrastructure.

**End of May 2009: New PROGRESS Transnational Call on Social Experimentation (VP/2009/005)** Closing date: 1<sup>st</sup> September See: <http://ec.europa.eu/social/main.jsp?catId=630&langId=en&callId=217&furtherCalls=yes>. The call aims to support the testing out, evaluation and mainstreaming of new policy approaches related primarily to active inclusion, child poverty and access/quality health/long-term care. NGOs can apply but under specific conditions and would need to be part of a partnership with public authorities (local, regional/national level) and bodies with specific evaluation expertise. Questions should be sent by email only to: [empl-progress-vp-2009-005@ec.europa.eu](mailto:empl-progress-vp-2009-005@ec.europa.eu)

**15 – 16 May, 8th Meeting of People Experiencing Poverty.** The 8th Meeting was hosted by the Czech Presidency and the Commission, organized by EAPN, and was held in the Palais d'Egmont. It focussed on the theme: Where we live, what we need. Over 200 people participated in the event, the majority being people directly experiencing poverty from the 27 member states, together with their national coordinators. The participative workshops focussed on 3 key areas: financial exclusion, housing and access to other key services.

**2009 Round Table on Poverty: 16th October 2009, Stockholm.**

The final title will be: Social inclusion in times of recession - New challenges for the Active inclusion strategy. On the 14<sup>th</sup> May, a 2<sup>nd</sup> meeting was held between the Swedish Presidency, the Commission and social NGOs. EAPN Sweden is

part of the delegation with the Swedish Presidency. The focus of the event will be on Active inclusion in times of recession – new challenges, with a strong focus on reinforcing the social OMC and building for 2010. The revised programme makes governance and participation and the role of the OMC cross-cutting issues, as well as putting more emphasis on linking the Conclusions to the Legacy for 2010. However, there will be no linked informal Social Ministers meeting, like under the French Presidency, which weakens its potential for political impact.

### **Social OMC – Thematic Focus: Homelessness and Housing Exclusion**

This year the thematic focus for this “light year” (when there is no National Strategic Report) is Homelessness and Housing Exclusion.

**June/July 2009: the SPC members returned their responses to the Questionnaire by the 15<sup>th</sup> June. A first discussion took place in the meeting on the 2<sup>nd</sup> July. Although some individual NGOs were consulted, there was no formal stakeholder discussion at national level, despite EAPN warnings.**

The responses will also be analysed by the Networks of Independent Experts and a report published, which will provide the basis for a conference at the end of the year. The questionnaire covers the overall policy framework, access to housing for homeless people and quality of housing, use of integrated active inclusion approach, governance, evidence/monitoring and evaluation.

- Other activities financed through PROGRESS on Homelessness and Housing Exclusion will include:
  - o A study on housing exclusion carried out by University of York, started on the 15<sup>th</sup> of January 2009 will take 15 months to complete.
  - o A Peer Review on measurement of homelessness and housing exclusion in Austria.
  - o Several Mutual learning projects and the Network of Local Authorities Observatories
  - o Development of indicators on housing costs and housing deprivation
  - o Social Situation Report with a thematic focus on housing.

### **Minimum Income Report**

**The synthesis draft report is now being debated with the Commission and the national experts. It should be finalised at the end of August and published in September. The independent expert national reports will also be translated and published on the website.**

The report will assess access, adequacy, coverage, sustainability and the link to integrated Active Inclusion approaches. It will aim to propose recommendations for better implementation of adequacy amongst other themes. On May 18<sup>th</sup>, the National Independent experts, coordinated by Eric Marlier and Hugh Frazer submitted their national reports on minimum income.

### **Reinforcing the OMC**

Following the Communication published in July 2008 on [Reinforcing the OMC](#) (July 3<sup>rd</sup> 2008), the SPC's 2009 Work Programme highlights 4 areas for progress.

- Better dissemination, implementation and follow up.
- Targets.

- Mainstreaming social objectives.
- Regular meeting with SPC and social partners and with EU NGO's.

#### **New Developments:**

- The Social Inclusion Unit is preparing a study on Reinforcing the OMC. It should be starting in May for 15 months, and will be delivered through a Framework Contract. **It will have two parts:**
  - 1) **Assessing the effectiveness of the OMC,** developing a methodology or assessment framework similar to the log frame used in the Lisbon National Reform Programmes. It is proposed to have a seminar with stakeholders by the end of the year to debate this – including NGO's and academics.
  - 2) **Application of the Framework to assess the OMC,**
    - a. Evaluate the effectiveness of the tools – ie Strategic Reports, Indicators etc.
    - b. The impact on member states in terms of content and governance.

#### **Other steps being taken:**

- The Social Inclusion Unit is trying to ensure other areas of follow up to the Communication eg Targets – The SI Unit is preparing a study on developing targets to be discussed with the SPC. We understand that the European Parliament is also doing a study on the OMC, contracted to IRS – Italy.

#### **Study on Stakeholders' Involvement in the Implementation of the OMC in Social Protection and Social Inclusion**

- **The first part of the study has been completed in July: 27 country reports, giving an overview of the state of affairs on stakeholders' involvement in the different EU Member States, However, few EAPN networks have been consulted and should contact their national independent experts to provide input.**
- **The latest information can be found on [here](#).**
- **A first stakeholder conference on the findings will be held in the Autumn.**

The study is contracted out to a consortium which includes: **INBAS GmbH and Engender asbl** It aims to analyse the key challenges in relation to the governance dimension in the [Revised Common Objectives for the Fight Against Poverty and Social Exclusion](#), in particular on the involvement of stakeholders. It will aim to support the implementation of better policies and the improvement of governance in the fields of social inclusion and social protection policy, as part of the efforts to strengthen the OMC. A key outcome will be to provide recommendations, benchmarks and good practices, as well as examples of practical tools to improve the quality and permanence of stakeholder involvement in the implementation of the OMC. It will be completed in June 2010. Specific outputs will include:

- A final report presenting the main conclusions and recommendations
- Leaflets for wider dissemination

## Social Impact Assessment

June: New Study produced: Assessing the social impacts of European policies. The study uses a database to give an overview of social impact assessment techniques and examined different assessment methods in 4 different areas: trade, internal market, transport and energy. It then sets out a roadmap for selecting the most appropriate method. <http://ec.europa.eu/social/main.jsp?langId=en&catId=89&newsId=485&furtherNews=yes>

DG Employment has produced a draft Guidance document in April aiming at strengthening the quality of the assessment of potential social impacts of Commission initiatives through a common framework and reference document for all Commission services. A workshop was held with the Social Platform on the 19<sup>th</sup> May to give feedback.

Background documents:

- [European Commission Revised Impact Assessment Guidelines](#)
- [Social Platform contribution to the consultation on Impact Assessment](#)
- [EAPN contribution to Impact Assessment consultation and to the Peer Review.](#)

## Previous Developments

The [Joint Report on social protection and social inclusion](#) 2009 was adopted on the 19<sup>th</sup> February 2009 by SPC together with the Supporting Document and the country annexes. The Spring Council endorsed the key messages from the Joint Report and emphasized the role of automatic stabilisers in the Economic Crisis (see Lisbon Section).

**Peer Reviews:** The [Social OMC Peer Review](#) Programme for 2009 has now been finalised. Full details can be found on the Peer Review website. The following Peer Reviews have been completed and the reports are on the website.

1.4.2009	Denmark	<a href="#">Combining choice, quality and equity in social services</a>	Estonia - Hungary - Italy - Lithuania - Portugal - Romania - Spain - The Netherlands - United Kingdom
5. - 6.5.2009	France	<a href="#">Alzheimer's and other related diseases: coping with behavioural disorders in the patient's home</a>	Czech Republic - Finland - Germany - Luxembourg - Poland - Slovenia - The Netherlands - United Kingdom
27. - 28.5.2009	Greece	<a href="#">Integrated programme for the social inclusion of Roma</a>	Finland - France - Germany - Hungary - Spain
15. - 16.6.2009	Germany	<a href="#">Ensuring a functioning healthcare system in regions with declining and ageing populations</a>	Finland - France - Greece - Ireland - Portugal - Romania - Slovenia - United Kingdom
6. - 7.7.2009	United Kingdom	<a href="#">The City Strategy for tackling unemployment and child poverty</a>	

### **Material Deprivation:**

**New EU poverty Indicator: The indicators sub-group of the SPC has just added a new indicator to the existing range of EU poverty indicators. This one aims to measure poverty of living conditions, and the impact of low income on access to basic resources eg insufficient money to pay the rent, eat meat regularly, go on holiday etc. The data is collected in the EU-SILC.**

The SPC in February discussed the use of material deprivation indicators which are now collected through the [EU SILC The Paper: What can be learned from deprivation indicators in Europe](#) by Anne-Catherine Guio – IWEPS, Belgium aims to supplement the relative picture of poverty with an alternative view based on material deprivation – enforced lack of a “basket of goods”.

### **SPC Work Programme agreed on 15 January 2009**

The main areas relate to: monitoring the impact of the crisis and follow up on active inclusion, child poverty as well as new concerns. These include:

- 1) Preparation of the 2009 Spring Council the and Joint Report
- 2) Reflection on EU social policy linked to the Lisbon Agenda post 2010. The Joint SPC and Indicators Task Force will work with the EMCO and EPC to review Lisbon Strategy beyond 2010 in first semester followed by full SPC debate. (Starting on March 18 and finalising opinion in July)
- 3) **Key Thematic Areas**
  - **Active Inclusion:** with the focus on the implementation of the Commission Recommendation, through the SPC working Group ( see next section)
  - **Homelessness and Housing Exclusion** – will be the thematic focus in 2009
  - **Mainstreaming social aspects of migration and ethnic minorities – including issue of Roma.**
  - **Preparations on 2010** and ensuring visibility.
- 4) **Work on Indicators through Indicators Sub-group (ISG)**

Main focus will be on:

  - Link between Lisbon, OMC and Social Agenda – developing indicators on flexicurity and methodological recommendations to help in identifying and defining national targets.
  - Developing indicators to monitor Active Inclusion, housing exclusion and material deprivation, child well-being, improving theoretical replacement rates.
  - How to monitor changes in prices on food/energy for low-income households and for monitoring the economic crisis.

### **Independent Expert Reports**

The draft proposals are for 3 Reports:

- 1) Minimum Income – this will be developed in the first 6 months.
  - 2) Homelessness and Housing Exclusion – based on an SPC questionnaire.
  - 3) Impact of the Crisis at the end of the year.
-

2008

**15/16<sup>th</sup> October 2008 7<sup>th</sup> Round Table on Poverty and Social Inclusion** –  
Marseilles, French Presidency.

The focus of the Round Table was on Active Inclusion and coincided for the first time with an Informal Council meeting. The Conclusions highlighted:

- Endorsement of the Active Inclusion Recommendation
- 3 Innovations – involvement of People experiencing poverty, the involvement of the media and the political momentum with the Informal Ministers meeting.
- In the Ministerial Meeting: no agreement was reached on Targets, although agreed importance of national targets and the need to define new tools to implement and monitor the OMC in this respect. A watchdog group was set up to analyse changes in the situation of poverty and “if necessary, call on the European Institutions to take a concerted response” See: [French Presidency Site](#)

**6th October 2008. EC Staff Working Document: “Monitoring progress towards the objectives of the European Strategy for Social Protection and Social Inclusion**, which reviews the full set of indicators developed and agreed by Member States in the context of the Social OMC. This document gives useful data on current trends on poverty, exclusion and inequality and assesses the impact of the growth and jobs strategy.

**September 2008: National Strategic Reports submitted to Commission on social protection and social inclusion by Member States**. Most reports were submitted on time. (See EAPN analysis below).

<b>EAPN activities</b>
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In 2009:

**Social Inclusion Working Group**

**June/July**

- **The Social Inclusion Working Group actively participated in the EAPN Joint Seminar on Post 2010, and the subsequent working group meeting on the 29<sup>th</sup> and 30<sup>th</sup> May 2009.**
- **The main focus of the WG was the follow up to the seminar related to EAPN’s position on post 2010, input to the thematic year: homelessness and housing exclusion, debating the draft adequacy explainer on minimum income, exchange on promoting participation in EAPN and EAPN good practice publication and checklist.**
- **Main outcomes: Adequate Minimum Income Explainer, is now in its final draft and will be published in September – the reference group providing input includes (FR, RO, AU)**
- **A reference group has been set up to help develop the Participation and Governance booklet on the OMC. ( PT, IE, ES, HU)**
- **The Group agreed to complete a new questionnaire on the crisis by the 4<sup>th</sup> September, to feed into a report on the social impact to be ready for the Round Table on the 17<sup>th</sup> October. This will be linked to another short questionnaire evaluating the effectiveness of the Lisbon Strategy response – evaluating the National Reform Programmes 2009 Implementation Reports.**
- **The next meeting will be on the 12/13/14 November in Copenhagen**

## Lobbying and Advocacy on the Social OMC

### **In June/July:**

- EAPN actively worked with members of the SIWG to organize the EAPN Seminar: Beyond 2010 on the 29<sup>th</sup> May 2009 and developing the draft EAPN position paper on post 2010: An EU we can trust. The amended draft was then further discussed in the EAPN General Assembly in Vienna on the 11/12 and 13 June and endorsed by the GA final declaration.
- A lobbying letter was sent to President Barroso and to the new group leaders in the European Parliament, prior to Barroso's first intervention in the new Parliament on the 15 July.
- July 2009: EAPN has been finalising the adequacy explainer on minimum income, and has liaised and met with the authors of the synthesis report on minimum income. EAPN has been pressing for a strong focus on adequacy, coverage and take up and for Recommendations which insist on further EU instruments including a Framework Directive.
- EAPN has liaised with the Commission (Antoine St-Denis) and the consultants contracted to deliver the Study on Stakeholder involvement in the Social OMC.(ENGENDER), highlighting EAPN experience and documents. EAPN will be invited to participate in the Autumn Seminar.
- EAPN has liaised with the Commission (Antoine St-Denis), on the new call on social experimentation and provided information/support to EAPN members who are interested in making an application
- EAPN has continued to liaise with the Swedish Presidency and the Commission, and EAPN Sweden on the programme and process of the Swedish Round Table. EAPN hopes to get the invitations to the networks confirmed shortly, and the participation of people in poverty. The President of EAPN will speak in the main plenary and Fintan Farrell, Director will be the rapporteur for the workshop on Active Inclusion.
- EAPN has worked with other NGO's to finalise a joint position on Reinforcing the Social OMC at the beginning of June; see [www.socialplatform.org](http://www.socialplatform.org). The Social Platform will present this contribution to the SPC meeting on the 14<sup>th</sup> September in Stockholm

### **In 2008:**

- December 2008: Lobbied for improvements on the Draft Joint Report.
- November 2008: Developed proposals on a social response to the Economic Crisis based on discussions with all key working groups, as an input to the Commission's Economic Recovery Package.
- October 2008: Developed Principles and Key Messages on Active Inclusion for the Round Table, and actively lobbied for the full Commission Recommendation with EPSCO endorsement and follow up.
- October 2008: Engaged in the National Action Plans and delivered an [EAPN Assessment Report](#) on the 2008-10 reports: Building Security, Giving Hope
- April 2008: Made proposals on [Strengthening the OMC](#).
- February 2008, [held a capacity building seminar](#) and developed together a new [Tool Kit](#), to support members engagement in the 2008-10 National Action Plans on Inclusion
- February 2008 EAPN inputted to the proposals on the [Guidelines for the National Strategic Reports](#)

## Key Concerns

- Backing a stronger OMC – with improved governance, hard EU and national targets and more effective mutual learning and tools and stronger political commitment to delivery on overarching strategy
- Implementing Active Inclusion approaches in member states.
- Effective follow to Child Poverty
- Ensuring a social response to the Economic Crisis – through the OMC.

## Background information

At the **Lisbon** European Council of March 2000, Member States and the European Commission agreed to take steps to “*make a decisive impact on the eradication of poverty by 2010*” and fixed the Union's ten year strategic goal of sustained economic growth, more and better jobs and greater social cohesion. Fighting poverty and social exclusion is a key element in ensuring that the EU meets this commitment.

Member States since co-ordinate their policies for combating poverty and social exclusion on the basis of a process of policy exchanges and mutual learning known as the 'Open Method of Coordination' (OMC), which had already been used in the employment field. From 2001 to 2005 this method only focused on social inclusion and was developed around a set of four objectives on the fight against poverty (access to resources, rights, goods, services and employment, prevention of poverty, addressing situations of poverty and mobilising all actors including NGOs). Since 2006, three policy areas are jointly addressed through this process, now known as the streamlined “Open Method of Coordination on social protection and social inclusion”:

1. The fight against poverty and social exclusion
2. Adequate and sustainable pensions
3. Accessible, high quality and sustainable health and long-term care.

The Open Method of Coordination involves:

- Agreeing EU-level [common objectives](#) (these were revised in 2006 to reflect streamlining)
- Developing [common indicators](#) to measure progress towards these objectives and ensure comparability
- Developing [National Reports on Strategies for Social Protection and Social Inclusion](#), which translate these objectives into policies at national level. The National Action Plans on social inclusion (NAP/incl) remain self-standing Plans and make up one of the sections within these reports
- Establishing a [Community Action Programme](#), promoting policy cooperation, exchange of good practice and European level mobilisation. This programme will be replaced in 2007 by the PROGRESS Programme (see separate section)
- European [reports](#) (Joint Reports by the Council and the Commission) documenting the outcomes of the process and highlighting the key challenges ahead.

Each year which falls in-between the main National Strategic Report (known as a 'light year'), the Commission will identify a key priority theme on which it will focus activities in the Social inclusion field. The theme for social inclusion for 2007 was Child Poverty.

In **2008** the Member States prepared the National Reports on Strategies for social protection and social inclusion 2008-11 which are timed to coincide with

the revised Lisbon process of the National Reform Programmes (see [Lisbon strategy section](#)). The reports were supposed to be based on the new Guidance Note (see background resources).

#### Strengthening the OMC

3<sup>rd</sup> July 2008, the Commission published a [new Communication on “Reinforcing the OMC on social protection and social inclusion”, as part of the renewed Social Agenda package](#)

#### **Timeline**

The 2008-11 National Strategic Reports on social protection and social inclusion were to be submitted to the Commission by the 15<sup>th</sup> of September, and at the latest by the 30<sup>th</sup> September 2008.

#### **Responsible for the OMC Social protection and social inclusion**

**National level:** National Ministries, [EU Social Protection Committee member](#), [National independent experts](#) on social inclusion.

**European level:** Commission: [DG EMPL](#), Unit E2. The officer responsible for writing the Joint Report is Katarina Lindahl ([Katarina.Lindahl@ec.europa.eu](mailto:Katarina.Lindahl@ec.europa.eu)). The EAPN contact person in the unit is Peter Lelie ([Peter.Lelie@ec.europa.eu](mailto:Peter.Lelie@ec.europa.eu)), he is also responsible for follow up on governance and strengthening the OMC, Peer Reviews and Independent Expert Reports..

The Commission contact person for Homelessness/Active Inclusion: Michele Calandrino ([Michele.Calandrino@ec.europa.eu](mailto:Michele.Calandrino@ec.europa.eu)).

**Desk Officers:** These officers write the country evaluations for the Strategic Reports on SPSI and often also on the National Reform Programme and Structural Funds. **See contact list**

#### **Background resources and documents**

See [Europa Website page on the Open Method of Coordination](#) - Commission documents (including objectives, indicators, reports, guidelines, contact lists):

Peer Review: See [website](#) to access reports and calendar

#### **.Key Documents in 2008/9**

- February 2008 [Guidance Note for preparing National Strategic reports](#), supporting document, manual for Gender Mainstreaming and Discussion paper on Disability.
- 2<sup>nd</sup> July 2008: Commission Communication on proposals for [Reinforcing the OMC](#)
- 30<sup>th</sup> September: [National Strategic Reports](#) on social protection and social inclusion.

#### **EAPN key positions and past action**

EAPN was instrumental in bringing about the agreement in Lisbon in 2000 to set up the OMC on social protection and social inclusion. In arguing for a true European strategy to fight poverty and social exclusion, its main concerns were to achieve a true impact on poverty throughout the EU by promoting better participation, partnership and mainstreaming of social inclusion in all policies.

EAPN's involvement in the OMC since the outset has been at both national and European level. At European level, this has meant contributing to the various stages in the setting up of the initial social inclusion strategy and later on in the shift to a 'streamlined' approach to the OMC on social protection and social inclusion. Influencing the content of the overall objectives in the fight against poverty, the framework of the National Action Plans on social inclusion, the interaction between the OMC and the Lisbon strategy of growth and jobs,

contributing to the content of the European reports on the National action Plans and the evaluation of the OMC... these are some of the key actions which the network has taken forward in an effort to improve this process in a way which will more effectively contribute to achieving the goal of poverty eradication.

EAPN has also coordinated the work done at national level by its national networks in engaging in the strategy, particularly in seeking to influence the National Action Plans on social inclusion. EAPN provides information, opportunities for exchange and brings together the insights at national level to better forge the European dimension of the work.

The experience to date shows that the OMC has mainly provided a positive opportunity for Member States to exchange experience and align their policies along commonly agreed, EU-wide objectives, giving prominence to the issue of poverty and exclusion in the European agenda.

EAPN's key demands with regard to the process include the need to:

- **Build inclusive societies** implementing universal social rights, sharing wealth, combating poverty myths **and keeping on the agenda the ambition to eradicate poverty.**
- **Develop Plans, not projects**, linked to economic process but not subject to it, Devising stable national planning tools and providing poverty and exclusion impact assessment
- **Guarantee Participation** by developing tools and programmes including indicators, ensuring the involvement of 'experiential experts' – people experiencing poverty themselves – and NGOs engaged in the fight against poverty, raising awareness with the general public, stepping up regional and local involvement and providing realistic financial resources.

#### **EAPN key references**

**November 08: EAPN [Report on the National Strategic Reports on social protection and social inclusion: Building Security, Giving Hope](#)**

April 08: EAPN proposals for [Strengthening the OMC](#) April 2008

EAPN response to the [draft Guidance Note on the National Strategies](#) for social protection and social inclusion

April 2008: EAPN has prepared a new Tool [Kit on engagement in the NAP Inclusion](#) and the OMC 2008-11, together with its Social Inclusion Working Group:

October 07: [EAPN Report on the Progress Reports on the National Strategic Reports on Social Protection and Social Inclusion- 2006](#): "Light year – Hard Work"

### **3. ACTIVE INCLUSION**

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EAPN Working Group concerned: Employment Working Group, Social Inclusion Working Group

**It is up to you! What you can do.**

- National networks are invited to join EAPN's campaign for Adequate Minimum Income schemes (see below for more information, or visit <http://www.eapn.eu/content/view/45/42/lang,en/> - 1515)

- **Follow up with your own Governments the implementation at the national level of the Active Inclusion Recommendation.**

<b>For information – latest policy developments</b>
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**European Parliament Report on Active Inclusion**

05/2008 - The Jean Lambert report on Active Inclusion was adopted in the European Parliament plenary. The European Popular Party (EPP) had tabled an alternative resolution. The main differences from the Jean Lambert report were quite important:

- massive elimination of almost ALL references to anti-discrimination and equal opportunities;
- elimination of Article 137 of the Treaty as legal basis;
- elimination of all references to a framework directive on services of general interest
- elimination of all references to targets and most of references to indicators;
- elimination of most references to carers and social economy;
- elimination of quite a few references to lifelong learning, training and education;
- tendency to cut references to regional development and the role of local authorities;
- replacing “minimum income” with “adequate income support”
- elimination (not always though!) of adjectives such as “coherent”, “integrated”, “effective”, “affordable”, “accessible”, “realistic” and once even “high-quality”.

The Lambert Report is an important step forward for EAPN, as it backs implementation of adequate minimum income – establishing targets for adequacy at least at the poverty threshold, supports progress towards a framework directive on Services of General Interest and underlines the need to counter negative conditionality.

Please find [here](#) the EAPN press release related to this occasion.

<b>EAPN past activities</b>
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**Social standards project**

2007- The first phase of the Social Standards Project involving EAPN members as well as EAPN(EU) has been finalised. Final report and summary accessible in several languages on [www.eapn.ie/standards](http://www.eapn.ie/standards)

**Round Table on Poverty and Social Exclusion (Stockholm, 2009)**

This year, Active Inclusion is the overarching focus of the Round Table on Poverty and Social Exclusion, to take place in Stockholm, under the Swedish Presidency, on October 15-16 2009. EAPN formulated input to the conference programme, calling for effective political recommendations that can constitute a strong legacy for 2010. This input can be accessed [here](#).

**Policy follow up and lobbying of the Active Inclusion process**

Implementation of the Active Inclusion Recommendation

The Social Protection Committee announced a series of measures for the implementation of the Active Inclusion Recommendation, after its meeting on February 19.

The SPC working group on Active Inclusion will be monitoring the implementation of the Recommendation within the OMC cycle, More on the framework will be discussed at the plenary session of the SPC on 24 April.

The Indicator Sub-group of the SPC has already included in its work programme for 2009 the work on Active Inclusion indicators, covering the three pillars (minimum income, link to the labour market, access to quality services). These indicators will be discussed at the following meetings: 10 Feb: 3<sup>rd</sup> pillar (access to adequate housing); 31 March: 2<sup>nd</sup> pillar (Make Work Pay, Labour Market transitions); 28 April: 3<sup>rd</sup> pillar (access to healthcare); 1 July: 1<sup>st</sup> pillar (minimum income adequacy)

The first 2009 report of the EU Network of national independent experts on social inclusion will present a review and analysis of minimum income schemes. The report is due in mid-April.

The issue of homelessness and housing exclusion, which is part of the Active Inclusion agenda, has been chosen by the Social Protection Committee as the social inclusion focus theme for 2009 and will be a central theme in the Joint Report 2010.

The partnership agreements with EU-networks have in their work programmes a specific focus on active inclusion.

A study on "Housing exclusion: welfare policies, housing provision and labour markets" was awarded to the University of York. It started on 15 January for the duration of 15 months.

The European Commission will examine, together with the social partners, how they might further develop autonomous initiatives to enhance the synergies with the other policy strands and actors in the active inclusion approach, such as public authorities - including those most active in the field, i.e. often regional and local authorities - service providers and NGOs.

The provisions of the new ESF regulation are useful for the support of active inclusion measures, namely through: a) developing and testing integrated pathways to active social and economic inclusion; b) mainstreaming innovative integration approaches that have a clear advantage over current practices; and c) disseminating and transferring good practice in promoting social inclusion across all Member States.

The European Commission, under PROGRESS, supports the following initiatives:

- Network of local authorities' observatories on active inclusion (NLAO). This project has been awarded to EUROCITIES and started on 1 March 2009, with the aim of monitoring and promoting best practices on active inclusion policies, especially in relation to quality services, and of analysing the development and implementation of active inclusion strategies at the local level. The pilot phase will last 18 months and will consist of five observatories (Southampton, Rotterdam, Turku, Prague and Bologna) and will focus on housing support services and social housing and on employment services.

- Mutual learning projects (two year duration, to be completed by end 2009). The most relevant ones in relation to active inclusion are: [CONNECTIONS](#) Organisational approaches to multiple deprivation; [MPHISIS](#) Mutual Progress on Homelessness Information Systems; [Standard Budgets](#) – an Instrument to Fight and Prevent Over-indebtedness and to Promote Financial Inclusion and Well-being; [Wise](#) Work Integration: Social Enterprises as a Tool for Promoting Inclusion; [SYNTHESIS](#) – Health and Social Services Integration for the Most Vulnerable Groups
- Peer reviews in area of active inclusion in 2009: Measurement of the impact of anti poverty and active inclusion policies: scoreboard as an example of an evaluation, monitoring and partnership tool – FR; A new qualification programme for people with reduced income capacity and without income support from the national insurance schemes – NO; the city strategy – UK; homelessness measurement – AT; Combining choice, quality and equity in social services – DK; Ensuring a functioning health care system in regions with declining and ageing populations – DE.

The Commission services will also undertake a stocktaking exercise in close cooperation with the OECD, to review the situation in Member States.

- 15-16/12/2008 - Council Conclusions were prepared by the Working Group on Social Question of the Council and adopted on at the EPSCO Council. In its proposals to the Round Table and a letter to the EPSCO [EAPN pressed Social Ministers](#) for a clear road map to implement the Recommendation, a proposal that was also backed by the Social Platform.
- October 08 EAPN presented its [Key Messages to the Round Table](#) on the implementation of Active Inclusion – including demands for a Road Map for implementation and lobbied the EPSCO through a letter to the Social Ministers
- October 2008 On the eve of the publication of the Commission Active inclusion Resolution EAPN insisted with success that it should still be a Resolution and not down graded to the level of a Recommendation
- 07/08 EAPN has participated in the drafting of the [Social Platform position on Active Inclusion](#)
- EAPN held a seminar in Paris on Active Inclusion on the 13 June, in Presence of French Haut Commissaire Martin Hirsch where EAPN principles for Active Inclusion were agreed. The [report of this seminar](#) with the principles is available on EAPN website.

### Minimum Income Campaign

- **An email update for signatories of the website petition, who have registered to be kept informed, will be devised and sent before the Fall. Regular email updates for this group will follow at regular intervals.**
- **Reminders have been sent to all national networks to keep the Secretariat informed of new signatories they have managed to collect and on the results of the media action.**
- **On 6-7-8 October, in the framework of the civil society contact group event, EAPN will be present at a stand in the European Parliament dedicated to poverty. This is a good opportunity to collect more signatures and to present our campaign and concerns to the new MEPs.**
- **On July 2<sup>nd</sup>, EAPN was present at a reunion of the AURORA Plus project (more information [here](#), in German only) in Linz, where we presented the work of EAPN on Active Inclusion, and especially the Minimum Income Campaign.**

- Signatures: the process of putting together lists of targets and starting collecting signatures from key personalities has already begun, with good results, both in Brussels as well as at the national level.
- Internet: the Adequate Minimum Income Website & Facebook cause have been launched: [www.adequateincome.eu](http://www.adequateincome.eu)  
[http://apps.facebook.com/causes/263061?m=63f2250d&owner\\_id=2546740](http://apps.facebook.com/causes/263061?m=63f2250d&owner_id=2546740)  
The website will be launched more widely in the last week of May, in conjunction with the media action.
- Background documents: The revised version of the “Myths and Realities” paper has been updated by Professor John Veit-Wilson and will be available online next week. The Adequacy Explainer and the MISSOC overview of minimum income schemes across Europe will be ready for the Fall.
- The media action week has been set in motion at Brussels level. Contracts have been concluded with the European Voice and EurActive for featuring the campaign, the appeal and main signatories.
- A campaign meeting took place in Brussels on March 6<sup>th</sup>, when partners discussed obstacles, opportunities and ways forward for implementing the campaign at the national level.
- All campaign materials as well as more information, can be accessed in the Members’ Room on the EAPN website (<http://www.eapn.eu/content/view/45/42/lang,en/> - 1515).
- January 2009: The text of the appeal has been finalized. A Contact Group has been set up at the EXCO recommendation. Terms of Reference for the project have been circulated to members of this group. The Campaign is to be discussed, as a fix item, in all EAPN WGs.
- November 2008: a media company has been selected for providing the support of a copy writer for drafting the manifesto.
- 30/05/08 EAPN Executive Committee discussed the next step of the campaign, and agreed on a project of a page of “advertisement” in favor of adequate minimum income schemes in the national news paper. First the Secretariat will support the development of a ‘manifesto’ (briefing note to be circulated for comments early September). Each National Network will seek to have this ‘manifesto’ signed by well known people/organisations/Trade Unions. People who sign this text will be also asked to pay a fee that will pay for the publication of the advertisement).The text will be published with the list of all the signatories. The Adequate minimum income campaign will be articulated with EAPN more general campaign on the eve of the European elections.
- On 12 March 2008 a reflection day was organised in Brussels to exchange experience on this first phase and begin to shape a second phase. See report of this meeting as well as evaluation on EAPN website extranet access
- March 2008 / A [special issue of EAPN Network News](#) devoted to the Campaign has been issued

The aims of this campaign **are to:**

- Promote EAPN, and develop a more campaigning image of our organization.
- Build clear common EAPN messages likely to be promoted in the next years
- Raise awareness within EAPN national members and wider circles, of the importance of the issue, of its European dimension and the current windows of opportunity for progress at EU level.
- Invite and support EAPN national members to campaign on the issue:
  - towards the general public by organizing event and/or disseminating campaign material, aiming at impacting on representations
  - towards policy makers by sending EAPN common manifesto letter to their national policy makers, pressing Member States notably to respond favorably to the second consultation on activation/minimum income.
  - Strengthen NN capacities to campaign.

- At EU level to give visibility to the issue among civil society organization and policy makers and to press EU institutions to adopt an ambitious approach to the issue.

See [information on the campaign](#) and directly download **campaign material** on [www.eapn.org](http://www.eapn.org).

See also Social Inclusion section for updated information on EU policy developments on Minimum Income.

### **Background information**

Minimum income is one of the cornerstones of social protection systems. On the 24<sup>th</sup> June 1992, the European Council agreed unanimously to lay down common criteria on “sufficient resources and social assistance in social protection systems” ([Recommendation 92/441/EEC](#)). Since then most Member States have introduced minimum income systems, but there are significant differences in how these schemes work and their impact on vulnerable people. In the Social Agenda published in February 2005, the Commission reiterated its commitment to publish a communication on the issue. This was finally published on the 8<sup>th</sup> February 2006, in the form of a [Consultation “On action at EU level to promote the active inclusion of the people furthest from the labour market”](#).

A two stage consultation was organised by the Commission in 2006 and 2007- They have set out a new comprehensive policy **concept called Active Inclusion** for supporting those furthest from the labour market based on 3 pillars: “a link to the labour market through job opportunities or vocational training; income support at a level that is sufficient for people to have a dignified life; better access to services that may help some individuals and their families in entering mainstream society”.

The second stage consultation in 2007 proposed to deepen the Open Method of Coordination through the adoption of Common principles

- income support sufficient to avoid social inclusion (restating the principles of the 92 recommendation)
- link to the labour market
- link to a better access to quality services

12 Member States responded to the consultation, together with 6 Social Partners, 35 EU level NGOs and 22 national social partners, organizations or NGOs (including EAPN Ireland and EAPN France, as well as the UK Social Policy Task Force) (see [responses to the consultation](#))

3 October 2008: The Commission finally adopted a welcome [Recommendation and accompanying Communication on the active inclusion of people excluded from the labour market](#)

### **Responsible for**

**National level:** [EU Social Protection Committee Member](#)

**European level:** [DG Employment and Social Affairs](#), Unit E2: Officer responsible: Michele Calandrino.

### **Background resources and documents**

Commission documents – Action on social protection and minimum income on the [DG Employment social protection site](#): [http://europa.eu.int/comm/employment\\_social/social\\_protection/index\\_en.htm](http://europa.eu.int/comm/employment_social/social_protection/index_en.htm)  
[Active inclusion web page on Europa website](#)

[MISSOC/EUROSTAT](#) data on social protection schemes at member state and EU level.

### **EAPN key positions and past action**

EAPN has been concerned to defend and improve minimum income across the EU as part of an overall commitment to minimum social standards. The underlying position has been the need to defend adequate minimum income levels that enable a dignified life, and together with the access to services, provide people with a secure basis in which to build their routes into work or into other activities. In the response to the new Communication, other key concerns are the need to develop supportive activation measures which lead to more and better jobs, as well as developing strategies that empower and meet the needs of all people at risk of poverty and social exclusion, without insisting on work as the only route

Adequate Income has been an underlying theme in the work of both the Employment and Social Inclusion Review Group, and on issue on which EAPN has been cooperating with other NGOs within the Social Platform. **In 2006 and 2007**, EAPN responded to the **two successive stages of the Communication** (see below)

In 2007 EAPN insisted that the wording 'Minimum resources' should not replace 'Minimum Income' and questioned the political will to deliver on this issue. See EAPN press release *Cause for serious concern for the poorest in Europe: EAPN responds to the conclusions of the EPSCO Council (23/O2/2007)*.

EAPN also participated in the EU funded project on Social standard.

Parallel to its policy lobbying EAPN has started a specific campaign on the issue.

### **EAPN key references**

All key references are available on the website [www.eapn.eu](http://www.eapn.eu), including the relevant edition of Network News, a briefing on Minimum Income, and EAPN Response to the first stage of the Consultation, "[Ensuring a Decent Income and a Better Life for All](#)".

Key documents are also available on the Social Platform site: [www.socialplatform.org](http://www.socialplatform.org) including [Social Platform response to the consultation](#).

EAPN Ireland has coordinated an EU funded project on Social Standards, several papers have been developed on the issue of minimum income. See website:

[www.eapn.ie/standards](http://www.eapn.ie/standards)

## **4. THE LISBON STRATEGY**

Contact person in the Secretariat:	Sian Jones + 32 2 226 58 59 <a href="mailto:Sian.Jones@eapn.eu">Sian.Jones@eapn.eu</a>
EAPN groups in charge:	EXCO, Employment Working Group, Structural Funds Working Group, Social Inclusion Working Group

### **IT'S UP TO YOU! WHAT YOU CAN DO:**

- **EAPN members should contact their Lisbon National Coordinators, to engage in the bilateral meetings with the Commission and provide their**

input to the Implementation Reports, particularly in relation to actions to respond to the social impact of the crisis

- Following the publishing of the reports on the 15 October, EAPN members should complete and return the EAPN questionnaire (2), built on their response to the Crisis questionnaire (1) by the 31<sup>st</sup> October.
- Participate in the lobbying campaign with EAPN on the EAPN position paper post 2010: An EU we can trust, pushing for a positive legacy at EU and national level.
- Sign the [Spring Alliance Manifesto](#) and encourage your members to do the same. Develop joint meetings with Environmental Groups and Trade Unions. Your organisation can sign the Manifesto by [using the online form](#).

### **For information – latest policy developments**

This section will also include information on the Economic Crisis – as this is now the refocused objectives of the Growth and Jobs strategy in 2009.

### **Lisbon Strategy: Growth and Jobs (2008-10) – Economic Recovery Plans**

#### **July 2009**

- **The Commission has started its cycle of bilateral meetings with the Lisbon National Coordinators in preparation for the 2009 Implementation Reports of the National Reform Programmes 2008-10. (See list). Guidance to the LNC has encouraged broader stakeholder involvement – this will be monitored by the Commission.**
- **The Implementation Reports will focus partly on the effectiveness of the MS Economic Recovery packages and partly on the normal review of their implementation of the Commission's Recommendations and Points to Watch of the NRP.**
- **The Annual Progress Report will focus on these two issues, and will be finalised to be endorsed at the December European Council.**
- **The [June European Council](#): was held on the 18<sup>th</sup> and 19<sup>th</sup> of June. The main focus was on the new Communication “A Shared Commitment to Employment, published on June 3<sup>rd</sup>. (See Employment Section). A solemn declaration on worker’s rights, social policy and other issues was attached to the Conclusions – as a pre-requisite for holding a new referendum by the Irish Government.**
- The [Spring Council Conclusions](#) (19-20<sup>th</sup> March 2009) focussed strongly on the crisis and in preparation for the G20 conference in London on the 2<sup>nd</sup> April. The main proposals prioritised regulating the financial sector, deepening the Growth and Jobs Strategy by stimulus measures and investment in defending jobs/ and smart green growth. The main reference to the social impact was to reinforce social protection as an “automatic stabiliser”. A proposal for an Employment Summit, was downgraded to a Troika to be held on May 9<sup>th</sup>. 3 preparatory workshop s will be held in Spain on the 15<sup>th</sup> April on Upgrading skills/Integration of youth: in Sweden on the 20<sup>th</sup> April on Increasing access to employment and on the 23<sup>rd</sup> April in Czech Republic on Maintaining employment and promoting mobility.
- On the 9 and 10<sup>th</sup> March, the EPSCO held their preparatory Council agreeing their key messages to the Spring Council. This year they included strong social references in the context of the crisis, reflecting the strong inputs of

the EMCO and the SPC. The Conclusions recognized that Lisbon has not delivered on all its objectives and that “*inequalities and exclusion persist, affecting social cohesion*”.

- On the 4<sup>th</sup> March, the Commission published the new Communication which replaces the Report on Lisbon to the Spring Council: Driving the economic recovery  
[http://ec.europa.eu/commission\\_barroso/president/pdf/press\\_20090304\\_en.pdf](http://ec.europa.eu/commission_barroso/president/pdf/press_20090304_en.pdf). This report builds on the previous package but makes new proposals on a new International framework for regulating the financial sector (including tax-havens and hedge funds), specific stimulus measures which include targeting support to low-income and vulnerable people, and investment in social as well as green jobs.
- On the 28<sup>th</sup> January 2009, the Commission adopted the “[country chapters](#)” and [Recommendations](#) under the Growth and Jobs strategy. The chapters analyse progress towards Growth and Jobs, taking account of the crisis. (the delay in publishing these documents was to allow this update to take place). The recommendations will be endorsed by the Spring European Council on the 19<sup>th</sup> and 20<sup>th</sup> March 2009 and subsequent formal adoption by the Council.

At the same time the Commission adopted a [companion document](#) which evaluates progress on the specific areas of the guidelines (macro, micro and employment). The final section contains the Draft Joint Employment Report, which will be approved separately. The full set of documents related to the 2008 Annual Progress Report package – Economic Recovery Plan can be found [here](#).

- On the 16<sup>th</sup> December 2008, The Commission adopted a package of documents to support the implementation of the Economic Recovery plan these included:
  - A report on the implementation and future priorities of the [Community Lisbon programme](#)
  - A review of the [European Globalisation Fund](#)
  - A new Communication “[New Skills for New Jobs](#)” and fuller [Staff Working document](#) – promoting higher skills to meet “requirements of EU in 2020”
  - A one year on report on the [Single Market Review](#) carried out in 2007.
- On the 26<sup>th</sup> November 2008, the Commission’s Communication on a “European Economic Recovery Plan” as part 1 of the 2008 Annual Progress Report, and was endorsed by the December European Council. The plan is based on 2 key pillars: 1) Financial stimulus package based on boosting demand and purchasing power, 2) Short-term investment in “smart green jobs”. Solidarity and social justice is supposed to be an “underlying principle”. Key initiatives include launching a major EU employment support initiative – reinforcing activation particularly for the low-skilled, support for the most vulnerable, and creating demand for labour by reducing social charges and reduced VAT rates. Active Inclusion and flexicurity policies should be focussed on re-integration and avoiding long term unemployment. Adequate social protection is seen as providing incentives to work “while preserving purchasing power”.
- **October 2008- New National Reform Programmes cycle 2008-10: Most of the [National Reform Programmes](#) were presented by the 15<sup>th</sup> October as agreed. They are displayed on the Growth and Jobs Website:**

- July 2008: The Council adopted the Employment Guidelines. (See Employment Section and EAPN briefing note/updated tool kit – [www.eapn.eu](http://www.eapn.eu))

The Spring Council was held on the 13<sup>th</sup> and 14<sup>th</sup> March 2008. However, the Conclusions were the most negative for Social Europe for some years. The tone was self-congratulatory that the “fundamentals of the EU remain sound. The Conclusions confirm that the **Integrated Guidelines remain unchanged** as do the four priority areas from 2006:

- 1) Investing in knowledge and innovation.
- 2) Unlocking the business potential, especially of SME’s
- 3) Investing in people and modernizing labour markets
- 4) Climate change and energy policy for Europe

The Spring Council Conclusions 2008 emphasize that economic, social and territorial cohesion contributes to fulfilling “the objectives of the renewed Lisbon Strategy’ but not the other way around. The focus on the 3<sup>rd</sup> priority is now on education and the “knowledge triangle – research – innovation and education” and the only concession made to social inclusion is a focus on the renewed Social Agenda. On a positive note the Commission and Member States were invited to “strengthen the involvement of relevant stakeholders in the Lisbon process.

See:

[http://www.consilium.europa.eu/uedocs/cms\\_Data/docs/pressdata/en/ec/99410.pdf](http://www.consilium.europa.eu/uedocs/cms_Data/docs/pressdata/en/ec/99410.pdf)

### **Post 2010 Lisbon Strategy Discussions**

#### **New Timetable and Developments (July 2009)**

- **The SPC and the EMCO held a further debate on its post 2010 initial position.**
- **President Barroso gave his first speech to the European Parliament Plenary on the 15<sup>th</sup> July. However, he stopped short of presenting his full vision on post 2010, as Parliament decided not to confirm his appointment until after the Irish Referendum on the 2<sup>nd</sup> October.**
- **The Joint SPC-ISG Task Force on Lisbon will present and discuss its final report on the 14<sup>th</sup> September.**
- **Mid September, the Commission will launch its public consultation on the Post 2010 Agenda. It’s not clear yet if this will be just an internet consultation or include a stakeholder debate. This appears to have been in response to heavy lobbying by NGO’s and other stakeholders.**
- **On the 21<sup>st</sup> October the SPC will discuss its contribution on the post 2010 agenda. This will be endorsed on the 10<sup>th</sup> November following the adoption of the EMCO contribution on the 27-28<sup>th</sup> November.**
- **The EPC will endorse their contribution on the 13 November, followed by the EPSCO on the 30 November. This will be followed by the ECOFIN on the 30 November, and the European Council on the 10-11 December.**
- **By the end of 2009, the Commission will present its full proposals on post 2010, with a view to reaching agreement before the Spring European Council. However, its still not clear whether this will be an introductory debate or the full agreement, due to the fact that the new Commission doesn’t formally get elected until the end of the year.**

- The latest information/feedback appears to highlight that the Ministers nor the Commission are not in the mood for very radical changes. The main focus is likely to be some light revisions to the Integrated Guidelines. The Employment Troika and preparatory meetings in April will be used to build consensus also on this area.
- The EMCO and SPC started first discussions on post 2010 in February through a joint Task Force. The Informal Council on the 26/27 March in Prague focussed on draft proposals. The theme of post 2010 will be the key thematic focus for both EMCO and SPC in April and June meetings. The SPC will finalise its opinion for the July 2 SPC meeting.
- The Commission has began its discussions on the post 2010 strategy. The Secretariat General will take the lead on these proposals. A meeting was held with the [Lisbon National Coordinators in Paris](#) on the 5 December. The proposals of Cohen-Tanugi were discussed and a stakeholder seminar was held afterwards, but NGOs were invited belatedly and few were able to attend. The main focus was on how to drive forward the growth and job agenda in response to the crisis, and to make the EU the most innovative, knowledge-based and low-carbon economy. The main priorities were:” re investing in human capital, knowledge and innovation, modernising the labour markets, and drawing up active social cohesion policies, promoting “green” growth and an environment favourable to enterprises and economic activity”. Further meetings will be held of the National coordinators in February and April 2009, and until Spring 2010.

## **EAPN ACTIVITIES**

### **National Reform Programmes and Economic Recovery**

#### **June/July**

- **On the 20<sup>th</sup> July, EAPN sent out a questionnaire on the social impact of the crisis to its members on the 20<sup>th</sup> July, with response date by the 4<sup>th</sup> September. This will be followed by a further questionnaire linked the Implementation Reports of the NRP, with response date by the 31<sup>st</sup> of October. The first report will be finalised prior to the Round Table on Poverty and the second one by the end of December 2009**
- **On the 8<sup>th</sup> July, EAPN sent letters to President Barroso and Group leaders of the EP prior to Barroso’s maiden speech on the 15<sup>th</sup> July. See: <http://www.eapn.eu/content/view/1067/77/lang,en/>**
- **On the 8<sup>th</sup> of June, EAPN sent a letter to Prime Ministers prior to the June European Council, highlighting our short-term concerns on the crisis and long-term demands on post 2010**

#### **Previous**

- In March, following discussions with the SIWG and other working groups, EAPN lobbied the EPSCO and the Spring Council with 2 letters and press releases. The main focus was on the need to develop coherent short-term measures to limit the social impact of the crisis whilst developing a more comprehensive long-term strategy which built on the lessons of the failures of the current growth and jobs strategy and the economic model that underpins it. The specific demands were to support public investment in social protection, adequate minimum income and social services as vital tools to mitigate the social impact and invest in people. A key concern was the impact on NGO’s – their services and advocacy actions. In the press release whilst welcoming the confirmation of the need to support social protection systems EAPN highlighted our dissatisfaction with the lack of an integrated, cross-cutting approach to social impact or the unwillingness to

use the crisis to stimulate a broader debate on the causes and weaknesses of the current strategy.

[See Press Release/Letter](#) to Spring Council

See [Press Release and Letter to the EPSCO Council](#)

- EAPN is preparing a response to the new Communication together with a Reality Check highlighting current developments at member state level based on the member's fiches.

### **Post 2010**

- **EAPN held its seminar on the 29<sup>th</sup> May involving SIWG, EWG and SWG and outside stakeholders to agree proposals on the legacy for 2010 and proposals for a post 2010 Lisbon Strategy. The EAPN position paper was further discussed and endorsed at the EAPN GA in Vienna in the middle of June. It was forwarded to Prime Ministers, Barroso and the New Parliament in June and July. See more [here](#).**
- **EAPN is elected to the Steering Group of the Spring Alliance, as representative from the Management Ctee of the Social Platform.**
- **The Spring Alliance manifesto is finalised on the 11 July. EAPN signed up and encouraged its member to do so. See [www.springalliance.org](http://www.springalliance.org)**
- **EAPN participated in the Spring Alliance interim seminar on the 17<sup>th</sup> June, in Brussels which tested out the draft manifesto on other stakeholders.**
- **The manifesto will be launched in Brussels on the 28<sup>th</sup> September, with an intervention by President Barroso. Further events/lobbying planned in the run up to the Spring Council.**
- EAPN is also a key player in 2 broad alliances to build broader approaches to the crisis and a new post 2010 vision based on a social and sustainable development and global equity. The first is with the **Spring Alliance** (a joint alliance between the Social Platform the EEB and the ETUC). EAPN spoke at the launch conference on the 28/29<sup>th</sup> January 2009 and is chairing the working group on a new economic model.
- The second alliance is with the **cross-network alliance**, involving a broad range of NGO's linked to the European Social Forum and ATTAC. EAPN participated in the first meeting on January and will participate in the follow up meeting on the 18 and 19<sup>th</sup> April in Frankfurt.
- EAPN also participated in the Alternative ECOFIN held in Prague on the 30 March – 1<sup>st</sup> April.
- 16 EAPN members (national networks and EOs) responded to the EAPN Questionnaire on the NRP 2008-10. The initial findings were published as [Key Messages: Will the Economic Crisis force a stronger social pillar in Lisbon?](#) EAPN social inclusion scoreboard on NRP 2008-10 on the 18<sup>th</sup> December 2008, coinciding with the EPSCO.
- The full report will be published on the 6<sup>th</sup> February (see [www.eapn.eu](http://www.eapn.eu)).
- EAPN published a report on the Economic crisis to influence the debates leading to the European Economic Recovery Plan (2008 Annual Progress Report). "[From financial crisis to recovery – where is the strategy to combat poverty](#)". This was based on discussions in the SIWG, EXCO, EWG and SFWG in October and November. EAPN also contributed to the Social Platform position, following a joint meeting with representatives of the Secretariat General. It appears that some gains were made in the introduction of the horizontal principle on solidarity and social justice. But the social dimension remains still diluted. EAPN demanded a specific pillar focussing on social protection and social inclusion, including reinforcing minimum incomes and integrated active inclusion, investment in social as

- well as green jobs, and detailed monitoring by the EU of social impact. This has now been taken up by the SPC who will be delivering regular bulletins.
- October 2008: the Lisbon Tool Kit has been updated.
  - EAPN has met with ETUC and MEP Anne Van Lancker to discuss the input into the Parliamentary Report on the Employment Guidelines and to Lisbon. The changes to the Guidelines text were agreed by the June Council and appear to include positive developments on governance and promoting integrated principles of active inclusion (see September 2008 EAPN briefing).
  - July 2008: EAPN has published an [updated Lisbon Tool Kit in July](#), which will help its member engage with the National Reform Programme Process. This included lists of the new Lisbon Coordinators and bilateral meetings organized by the Commission.
  - May 2008: A revised coordination process has been agreed with the EXCO in May, and all working groups will participate in a preparing a national response to an agreed questionnaire.
  - March 2008: EAPN sent a [letter the Prime Ministers](#) prior to the Spring Council and published a Press Release on the eve of the Spring Council on the 13<sup>th</sup> and 14<sup>th</sup> March.

### Background information

The 'Lisbon Strategy' (also referred to as the Lisbon Agenda) is a way of describing the more immediate priority objectives of the EU for the period 2000-2010. It is called the 'Lisbon Strategy' because it was agreed at the Lisbon Council in 2000 when the Heads of State and Government of the EU agreed the following vision: "*To make the EU the most competitive and dynamic knowledge based **economy** in the world capable of sustaining more and better **jobs** and with greater **social cohesion**". Progress in reaching this objective is reported to the EU Spring Council (March every year) which decides the key priorities for following up on the Lisbon Agenda. The Gothenburg Council in 2001 made **environmental** protection part of the 'Lisbon Strategy'.*

Following changes in most of the Governments who agreed the Lisbon Strategy, the election of a new European Parliament and the appointment of a new Commission in 2004, an evaluation of the Lisbon Strategy was launched. This evaluation was strongly influenced by the report of the 'Kok Group' which was appointed by the Council to prepare an input into the evaluation. This evaluation led to a revised Lisbon Strategy which was agreed at the Spring Council 2005. The revised Lisbon Strategy did not change the original intentions of the Lisbon strategy but it did decide that the future orientation of the strategy should focus on **Growth and Jobs**. In addition it decided on a new method of governance for the Lisbon Strategy, involving the adoption in June 2005 by the Council of [Integrated Guidelines for Growth and Jobs](#) (integrating the Broad Economic Policy Guidelines –divided between Macro and Micro Economic Guidelines- and the Employment Guidelines). The European Employment Strategy started in 1997 is incorporated in the Lisbon Strategy and constitute the Employment part of it.

The new Integrated Guidelines become the basis for Member States to produce [National Reform Programmes](#), which were submitted to the Commission in October 2005 for the period 2005–2008. National Reform Programmes (NRP) are structured into macro, micro economic and employment chapters, each providing a presentation of the situation, an outline of initiatives and measures taken in response, and a description of budgetary resources involved, including

structural and cohesion funds. The Employment section of these National Plans is the National Action Plan for Employment.

These National Reform Programmes should contribute to the goal of social inclusion, through a process of **feeding in and feeding out** between the Lisbon strategy and the OMC (how Lisbon contributes to social inclusion and how the OMC on SPSI contributes to growth and jobs). The Commission encouraged the involvement of all relevant bodies in the preparation of these National Reform Programmes, they particularly mention public authorities at national, regional and local levels, social partners and 'where appropriate' civil society. Responding to the Commission, Member States have appointed national Lisbon Coordinators ('Mr/Ms Lisbon').

On the **25<sup>th</sup> January 2006**, the Commission published its [first Annual Progress Report](#) (APR). Part I evaluates the process followed in drawing up the reform programmes, and highlights a number of key initiatives, attaching a short list of good practice examples. It also includes a more detailed analysis of the macro/micro and employment aspects linked to the Integrated Guidelines. This section serves as the basis for the Joint Employment Report. Part II provides a detailed assessment of the National Reform Programmes, assessing strengths and weaknesses, but without going so far as to make formal country specific recommendations.

The Lisbon "annual cycle" encompass:

- **Implementation Reports of the National Reform Programmes** submitted by Member States in the autumn (submitted in **October 2006**), **In the autumn 2008 Member States presented new National Action Plans for 2008 -2010**.  
See: [http://ec.europa.eu/growthandjobs/index\\_en.htm](http://ec.europa.eu/growthandjobs/index_en.htm)
- Multilateral surveillance **was carried out**, involving the **Cambridge Review within the EMCO framework for employment aspects within the NRPs**. The Commission advocated a light touch around **themes** rather than being country specific ie flexicurity, life cycle approach and sustainable social protection.
- [Commission Annual Progress Report](#) based on National Reports in the end of the year (in December 2006: adoption of APR and **Country Recommendations made for the first time under the revised Lisbon strategy, December 2007 adoption of APR incorporating the analysis of the National Action Plans**.),
- **The February EPSCO adopt the Joint Employment Report**
- **The European Spring Council adopt both Joint Employment Report and Annual Progress Report at the Spring Council.**

#### **Responsible for the Lisbon strategy**

**National level:** National Ministries in charge of employment and economic affairs, Mr/Ms Lisbon, social partners, Members of the [Employment Committee](#) and the [Economic Policy Committee](#)

**European level:** EU Commission: [President Barroso](#) and the Commission's [Secretariat General](#), with input from various DGs including DG EMPL. EU level representatives of social partners are actively involved.

#### **Background resources and documents**

The main documents on the Lisbon process are found on the Europa Growth and Jobs site:

[http://europa.eu.int/growthandjobs/index\\_en.htm](http://europa.eu.int/growthandjobs/index_en.htm)

### **EAPN key positions and past action**

With the revision of the Lisbon Strategy in July 2005, EAPN has been primarily concerned about the loss of priority of the “social pillar” of Lisbon, with the primary emphasis given to “growth and jobs” as a pre-condition for reducing poverty and social exclusion. EAPN networks have engaged actively in the new process by carrying out an evaluation of the first national reform programmes through a questionnaire. The report [“A future worth having” \(March 2006\)](#) highlights the findings, evaluates the annual progress report and assesses how far the revised strategy is delivering on governance, social inclusion and poverty.

#### **Key points were:**

- The neglect of a social framework of the economy, with a sidelining of the social objectives, based on the assumption that growth automatically leads to jobs and greater social inclusion.
- The emphasis on modernizing pension and social protection systems, without ensuring an adequate income for a dignified life.
- The focus on work at any price, and lack of demand-side measures to create quality employment, or to investigate the role of the social economy
- The need for broader, integrated strategies with adequate support services to help people along the road to work.
- The priority given to flexicurity, without analysing the impact on working poor.
- The lack of engagement with civil society in the entire process

#### **Other EAPN key references**

A further EAPN response was published on the [Annual Progress Report and the Joint Employment Report](#) (See below)

On 16 January 2008, EAPN published its [Response to the 2007 National Implementation Reports \(Social Inclusion Scoreboard](#) and to the [Annual Progress Report: Growth, Jobs but not Inclusion](#) EAPN has contributed to the Social Platform Position on Lisbon. See Social Platform site: <http://www.socialplatform.org/code/en/camp.asp?Page=724>

[Making Lisbon deliver for People Experiencing Poverty – report on Implementation Reports 2007](#)

## **5. EMPLOYMENT**

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EAPN groups in charge: Employment Working Group

#### **It's up to you! What you can do:**

- Register and participate in the EWG meeting and capacity building seminar, to be held on November 20<sup>th</sup> and 21<sup>st</sup> in Greece
- Contribute to the questionnaire dedicated to the impact of the crisis in your country and liaise with your national representative in the Social Inclusion Working Group and EXCO member to do so (see the Lisbon Strategy section above).
- Contribute to the questionnaire dedicated to the NRP evaluation in your country and liaise with your national representative in the Social Inclusion Working Group and EXCO member to do so. (see the Lisbon Strategy section above).

- Contribute to the preparation of the EAPN position on flexicurity, to feed into the EMCO debate on the subject on October 9. Details about this process will be dispatched by email soon.
- If you are interested in finding out more about working on the Employment Guidelines, please contact [Philip O'Connor](#) (chair of the EWG and coordinator on this topic) for more information.
- If you are interested in finding out more about the “diary project” (collecting testimonies in the shape of diaries by jobseekers or MI recipients in times of crisis), please contact [Colin Hampton](#) for more information (coordinator in the EWG for this topic).

#### Latest policy developments

##### Employment Communication

The European Commission put out, on July 3<sup>rd</sup>, the communication entitled “A Shared Commitment for Employment”. More information on the content, as well as the text of the communication, can be found [here](#). The communication builds on the results of the Employment Summit (see below), in the preparation of which EAPN was involved through the Social Platform. Social NGOs expressed their disappointment at the communication, which does contain some positive steps forward, but does not overall pick up on our main concerns regarding quality of employment, the specific situation of vulnerable groups, and the social impact of the crisis.

##### Employment Committee (EMCO)

The EMCO held its last reunion before the summer on June 24<sup>th</sup>. Among other things, it discussed its approach to flexicurity (position to be finalised in October – EAPN to input); the non-changing of the NRP assessment indicators, given that the Guidelines stayed the same; next steps for the post-2010 Strategy (consultation to be launched in the fall, final document to be endorsed by the December European Council); climate change; the EC Communication on Employment.

##### Informal EPSCO in Jönköping, Sweden, July 8-9

The Social Platform was invited to prepare an input for the informal meeting of Employment and Social Affairs ministers, which was held in Jönköping, Sweden, on July 8-9. EAPN contributed to this input, which you can read [here](#). The topic of the summit was “Promoting access to employment through more inclusive labour markets and active social security policies”. The priorities put forward by this EPSCO meeting for the Swedish Presidency are: Full employment and more inclusive labour markets; Promoting good health for an ageing EU workforce, primarily through negotiating the patient mobility directive and eHealth cooperation, and progress on the pharmaceuticals package; Emphasising the importance of gender equality for economic growth and employment. You can read the press release of the Swedish Presidency related to this event [here](#).

#### EAPN Activities

EAPN responded to the Commission Communication “A Shared Commitment to Employment”, highlighting our main concerns regarding a

number of issues which the document fails to adequately address. We welcome the mentioning of the Active Inclusion Recommendation, while the main point of concern continues to be the absence of a concrete plan for its implementation, both at national and at the EU level. Please read the full response [here](#).

EAPN also contributed with a paper on Skills and Mobility to the recent debate in the Employment Committee on these issues. This agenda, which has been pushed forward by the Commission with the support of the Czech Presidency in the past months, has not been adequately poverty proofed, and a number of concerns still remain to be discussed so that the proposed measures help improve the lives of people experiencing poverty and social exclusion on the ground. The response, prepared by the Secretariat together with the Employment Working Group, can be read [here](#).

#### Video project

Four EAPN networks (Belgium, United Kingdom, Romania and Lithuania) are involved, through their representatives in the Employment Working Group, in the making of a video focusing on positive and negative activation practices. The video will constitute a lobbying tool for the EU and national level, and will include interviews with people identified by the four networks, to illustrate the EAPN principles on good activation. Good practices will be contrasted with bad practices in the same country. The video is supposed to be shot during the month of November 2009 and finalized in the early 2010.

#### Conferences

##### Joint Social Conference

EAN, together with 16 other social NGOs and trade unions, at Brussels and EU level, are organizing joint conference on September 14th and 15th, in Brussels. The meeting will focus on two aspects, for which separate parallel workshops have been set up: social dumping and decent employment. The event is meant, first and foremost, to strengthen cooperation between social NGOs and trade unions, and to identify common positions and joint lobbying targets. This first attempt is supposed to evolve into a yearly conference, to be held in February, aimed at preparing a common position for the Spring Council. The EAPN secretariat is in charge of preparing the Issues Paper for the decent employment workshop, and will cover participation costs for 3 representatives from its membership. An additional 3 participants can attend on behalf of EAPN, provided that they are Brussels-based or if they can cover their own expenses.

On June 24-25, EAPN participated in the European Commission event called the "Employment Week". Although meant to bring together all relevant stakeholders, participation fees were prohibitive, which resulted in feeble attendance. The event was mainly attended by training companies and EU institutions. However, EAPN managed to secure a free stand, together with our partners the AGE Platform and the European Youth Forum. Also, Johannes Jorgensen, from EAPN Sweden and member of the EAPN Employment Working Group, was guest panelist speaker in a session titled "The Social Cost of Change". His intervention, prepared with the support of the EWG, was the key point of the session and it spurred a lively debate. More information about the event can be found [here](#).

14/05/2009 – EAPN was represented at a conference organized by the European Commission concerning the impact of the economic crisis on labour markets. Please find [here](#) the conference programme. Materials to follow soon.

19.05.2009 – EAPN attended the Thematic Peer Review organized by the European Commission and dedicated to "Labour market policies in response to the impact of the economic crisis". Materials to follow soon.

### **WISE project**

**A feed-back meeting with all project partners (8 participating countries) took place on June 23<sup>rd</sup> in Rome, with EAPN participation. The results of the four peer reviews were discussed, as well as ways forward and how to proceed with the drafting of the cross-cutting reports, which are supposed to look at specific country situations, country recommendations, as well as general proposals for the EU level regarding the promotion of Work Integration Social Enterprises. The main documents of the project, including the report of the feed-back meeting, can be found on the [project website](#). The cross-cutting reports will be finalised by September 15<sup>th</sup>.**

### **Background information**

In 1997 The Amsterdam Treaty, with a new chapter on Employment has been an important step: whilst employment policies remain national competence, it clearly gives to the European Institutions a stronger role. Structural Funds are one of the main financial tools to deliver the strategy.

The components of the EES are:

- Guidelines are proposed by the Commission and adopted by the Council,
- on the basis of which Member States develop annual National Action Plans for Employment
- Recommendations to each MS regarding its employment policy, proposed by the Commission and adopted by the Council.

Each year a Joint Employment Report is established by the Commission and the Council which assesses the national employment policies, it is forwarded to the Spring Council.

A peer review process had been set up to support the assessment of the national best practices. National practices selected by the EMCO are reviewed by other countries and independent experts.

Indicators are selected to assess progress made by Member States

The Employment Committee (EMCO) has been established, with advisory status to promote coordination between MS on employment and labour market policies (Article 130). It gathers two representatives for each MS.

An Employment Committee subgroup does a specific work on indicators. The EMCO ad hoc group gathers a restricted number of EMCO members and prepares the work of the full EMCO regarding some selected issue (for example the ad hoc group makes a review of the NAPs).

From the revamping of the Lisbon strategy in 2005, this EES has been integrated in the Lisbon strategy and is now the employment part of the Lisbon strategy.

### **European Employment Strategy**

### **Employment Summit**

The outcome of the Employment Summit (previously called a Troika), which took place on May 7<sup>th</sup>, and of its preparatory workshops, is not very encouraging. Find relevant document here

[Conclusions of the European Employment Summit](#)  
[Consolidated report of the three preparatory workshops](#)  
[Social NGOs to the EU Employment Summit: how to address the social crisis](#)  
[EAPN press release.](#)

Although the Social Platform was involved in the preparatory workshop (and EAPN, through the SP, as well), it was not invited to the final Summit, which benefited from no civil society participation – it was a meeting between the Troika Presidencies (the Czech, Swedish and Spanish governments), the European Commission, and social partners.

There are some positive aspects, such as mentioning putting people at the heart of the recovery plans, a more socially cohesive (including modern social protection systems) post-Lisbon strategy, an integrated approach (bringing together economic, employment and social aspects) and the explicit mentioning of vulnerable groups.

However, the social impact of the crisis is barely mentioned. Active Inclusion is not made a guiding principle. The usual agenda, keeping people into employment at all cost, flexicurity, skills upgrading and mobility is reaffirmed.

The EAPN Secretariat prepared a response letter for the EMCO prior to its discussion of the Joint Employment Report. This letter was included in the meeting documents of the EMCO and can be downloaded [here](#).

26/02/2009 - The Commission prepared the draft Joint Employment Report, which can be downloaded on [DG Employment webpage](#).

29/01/2009 – The European Commission presented to the Council a proposal to keep the Integrated Guidelines unchanged for 2009. This position was supported by the EMCO at its meeting on 19/02/2009.

March 08 In the framework of the Lisbon strategy (encompassing the Micro, macro and employment strategies: see section 3 above) the Spring Council endorsed Commission's proposals regarding employment, including

1/ the Draft Joint Employment Report (part III of the Annex to the Strategic Report: see [http://ec.europa.eu/growthandjobs/pdf/european-dimension-200712-annual-progress-report/200712-annual-report-annex3\\_en.pdf](http://ec.europa.eu/growthandjobs/pdf/european-dimension-200712-annual-progress-report/200712-annual-report-annex3_en.pdf)

2/ Country Recommendations  
([http://ec.europa.eu/growthandjobs/pdf/european-dimension-200712-annual-progress-report/200712-countries-specific-recommendations\\_en.pdf](http://ec.europa.eu/growthandjobs/pdf/european-dimension-200712-annual-progress-report/200712-countries-specific-recommendations_en.pdf))

3/ Proposals for the 2005-2008 Guidelines see  
[http://ec.europa.eu/growthandjobs/pdf/european-dimension-200712-annual-progress-report/200712-annual-report-integrated-guidelines\\_en.pdf](http://ec.europa.eu/growthandjobs/pdf/european-dimension-200712-annual-progress-report/200712-annual-report-integrated-guidelines_en.pdf)

The guidelines proposed remained unchanged, with only rationales reworded including more reference to active inclusion and flexicurity. The guidelines have

been officially adopted by the Council in July: see [adopted version](#). Some of the changes inserted in the narratives are useful to get in mind and to use in our lobbying work. See [EAPN briefing on the new guidelines](#), issued on 4 September.

**Resources and information:**

Information available on Europa website

[http://ec.europa.eu/employment\\_social/employment\\_strategy/index\\_en.htm](http://ec.europa.eu/employment_social/employment_strategy/index_en.htm)

**Responsible for the Employment strategy as part of the Lisbon Strategy:**

National level: National Ministries in charge of employment and economic affairs, social partners, Members of the [Employment Committee](#) European level: DG EMPL. (Robert Strauss, Unit D2 principally)

Two main key themes are currently dominating the Employment Strategy:

→ **Activation and Make Work Pay** (activation is also one pillar of the active inclusion notion, see below section 5.2. )

**Make Work Pay is the approach agreed on and regularly promoted by the Employment Committee.**

→ **Flexicurity**

The EMCO prepared a draft paper on Flexicurity in times of Crisis (to be found [here](#)) to serve as basis for its discussion on flexicurity, scheduled for the second part of 2009. The document defines flexicurity as a combination between contractual flexibility and strengthened ALMP. Security is understood mainly as increasing people's employability by upgrading their skills. The European Commission is preparing a workshop on flexicurity on 27 April, to provide policy input for the Employment Troika Summit at the beginning of May.

12/2008 - The Mission for Flexicurity of the European Commission prepared and released in December 2008 a Report, looking at the implementation of the flexicurity principles across Member States. The report reviewed the situation in France, Sweden, Finland, Poland and Spain, and it is available [here](#). The Czech Presidency of the European Union also announced, in the official programme, that they will prepare Conclusions on flexicurity

24/09/2008 - the Commission organised a Mutual learning seminar to discuss the first results of the Mission, EAPN as well as other NGOs participated actively (see <http://www.mutual-learning-employment.net/thematicreviews/>)

01/2008 - A Mission for Flexicurity (see [Europa webpage](#)) has been established, and visited 5 Member States for discussing in depth the state of play as regards the development and implementation of the national pathways based on the common [Flexicurity principles](#) agreed at the European Council in December 2007. As part of a mutual learning perspective, these visits will also give the opportunity to other Member States as well as to other relevant participants to take part in the discussion.. The final Mission Report will be presented in December 2008 to the Employment ministers. It will aim at proposing concrete suggestions to encourage the implementation of flexicurity policies, taking into account the common principles and "typical pathways" of flexicurity identified by the [Commission Communication](#) of June 2007: The Commission's public initiative should help Member States prepare their first report on the implementation of the national pathways based on the common principles, in the framework of the National Reform Programmes of Autumn 2008.

11/2007 - After a Commission proposal has been widely debated at EU level, the EPSCO Council adopted [common principles on flexicurity](#)

→ New Skills for New Jobs

16/12/2008 - The European Commission released its "New Skills for New Jobs" communication, providing a first assessment of labour market and skills needs up to 2020 and a mapping of existing anticipation instruments at national and European level. The document also proposes a more effective approach to ensure anticipation and matching between labour demand and supply through synergies between employment, training and education policies. The document, which features as a priority on the agenda of the Czech Presidency, will be discussed throughout the Year in the Employment Committee, and can be found [here](#).

09/03/2009 - The EPSCO adopted, on March 9<sup>th</sup>, Council Conclusions on the "New Skills for New Jobs" communication. The document endorses the Commission communication, stressing the need for upgrading skills and providing access to quality education and lifelong learning for all, as well as for mapping-out and anticipating the labor market needs in order to ensure better skills matching. The document can be accessed [here](#). The Spring Council Conclusions have also given additional impetus to this approach, viewed as the main medium- and long-term response to the crisis aftermath. The EMCO is carrying out an assessment (in its Ad-Hoc group) of this strategy. In line with the priorities of the Czech Presidency, the EMCO will also deepen its understanding of the link between skills and mobility. The opinion will be finalized on April 28<sup>th</sup>. The draft EMCO opinion can be found [here](#), and the Commission's background and discussion note – [here](#)

→ Social Economy

18/02/2009 - The European Parliament adopted (580 votes in favour, 27 against and 44 abstentions), last February 18<sup>th</sup>, the own-initiative report by MEP Patrizia Toia (ALDE, IT), dedicated to social economy. The report considers that "social economy enterprises [...] need a secure legal framework, based on recognition of their specific values". The report also calls for a European legal framework to be devised by the Commission, enabling "territorial partnerships to be established and maintained between the social economy sector and local authorities", and for the Commission to look into "reactivating the budget heading specifically for the social economy". The adopted text can be found [here](#)

The European Parliament Intergroup on Social Economy has launched its memorandum on social economy, in view of the upcoming European Parliament elections, which can be accessed [here](#)

The EAPN Secretariat, as well as members of EAPN Austria, EAPN Romania, EAPN Poland and EAPN Malta are partners in a transnational exchange project on Social economy led by DIESIS and CGM, whose aim is to assess the policy support given to Work Integration Social Enterprises (WISE) in EU countries through a comparative review of legislation as well as National Action Plans for Inclusion and Employment and Operational Programmes.

**Social package:**

Part of the social package unveiled in July 08 is devoted to 'Investing in People, More and Better Jobs, New Skills'. It includes

- a [Directive to improve the functioning of European Works Councils](#) to ensure effective social dialogue on restructuring operations.
- staff working documents, one encouraging and supporting Social Partners to step up their efforts to anticipate and manage structural change and another highlighting the importance of company-based trans-national agreements;
- a Report on the European Globalisation Fund that reviews its first year of operation, indicates how procedures can be simplified and streamlined and suggests a number of ideas as to how the EGF could be improved.

**EAPN key positions and past actions**

EAPN has been actively involved in monitoring the European Employment Strategy, with a particular focus on its impact on poverty and social exclusion. Some of the key concerns have been to pressure for more quality of jobs, evaluation of making work pay strategies and the development of positive activation policies, which do not penalise and pressure vulnerable people into jobs at any price. A further concern has been to evaluate how far the EES incorporates the overall Nice objectives of "strengthening social cohesion and inclusion" and to highlight the weakness of the participation of NGO stakeholders in the development of the National Action Plans and the lack of independent evaluation.

EAPN actions on the EES have included responses to the revised European Employment guidelines, reviews of the National Action plans for Employment, position papers on Making Work Pay and Good Activation, as well as responses to relevant public consultations.

**EAPN key references**

(All key references can be found on the EAPN website [www.eapn.eu](http://www.eapn.eu))

- Report on the Lisbon strategy and the National Reform Programmes ([A Future worth having](#)) March 2006)

- EAPN publication on employment Voices from the Poverty line (September 2006)

- [EAPN position paper on flexicurity \(October 2006\)](#)

EAPN has contributed to the Social Platform Position paper on [Flexicurity](#)  
[EAPN response to the Commission Green Paper on modernisation of Labour Law \(March 2007\)](#)

[EAPN response to the Commission Communication on flexicurity \(July 2007\)](#)

[See also issue of EAPN Network News \(June 2007\) devoted to Employment, including flexicurity.](#)

**Note: Concerns regarding employment are also integrated in EAPN inputs on Lisbon and Active Inclusion (see chapter 2 and 6 of this Policy Brief)**

## 6. STRUCTURAL FUNDS

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EAPN groups in charge:	Structural Funds Working Group	

### It is up to you! What you can do.

Working group members are encouraged to:

- **Be in touch with their National and Regional managing Authorities to see how they can contribute to the 2010 year by showing how Structural Funds are a tool for tackling poverty and social exclusion.**
- **Let the EAPN secretariat know how they are making use of the new EAPN Structural Funds manual. They should also seek support for the translation, printing and distribution of the manual (possible from National Technical assistance support). Working Group members were asked to let the EAPN Secretariat know how many additional copies of the manual in English or French would be useful for them and to inform the secretariat if they could get financial support at National level for reprinting the manual.**
- Get in touch with their managing authorities to see if any change is foreseen to the Operational Programmes as a result of the crisis. Send EAPN any relevant information on how the funds are changed as a result of the crisis. Ensure that there is a real effort put on simplification and that our key concerns are taken into account.
- Define their national network's priorities on structural funds for 2009, building on the capacity-building seminar outcomes ([see the notes](#)).
- Send the [social indicators' document](#) to their managing authority and monitoring committees if this was not done yet
- Get involved in activities around evaluation and closing of the programming period, to promote a social inclusion perspective
- join the Communities of Practice set up on the different aspects of EQUAL, and call on their managing authorities to do so as well: [www.esflive.eu](http://www.esflive.eu)
- EAPN Networks are encouraged to try to contact the desk officer following their specific country ([list](#)), and to inform the secretariat of their main concerns.

### For information – latest policy developments

#### Upcoming developments

- **The Barca Report was published on April 29th 2009. This report is a major step forward in the framework of the discussion on the future of cohesion policy. The main points are the following :**
  - **Social Inclusion as one of the two core objectives of the cohesion policy**
  - **Management of the structural funds is incompetent**
  - **Restore the structural funds as means to develop regions territories**
  - **Re-orientate the structural funds away from local elites**
  - **Structural Funds should be governed from the Commission. The document can be found [here](#).**

- The 6<sup>th</sup> interim Report on economic and social cohesion was published on June 25<sup>th</sup> 2009. It's mainly focused on the regional dimension of creativity and innovation. The second part of this document summarize key outcomes from the Consultation on the Green Paper on territorial cohesion. This document can be found [here](#).
- On July 22<sup>th</sup> 2009, the European Commission presented new measures aiming at simplifying management rules for the Cohesion Policy. As part of the measures to combat the crisis;
  - The Commission may reimburse 100% of the costs declared by the Member States for projects financed by the European Social Fund (ESF) in 2009 and 2010. This document can be found [here](#).
  - The European Regional Development Fund (ERDF) will be able to support the renovation or construction of housing for communities faced with social exclusion, particularly Roma, in both rural and urban areas. This document can be found [here](#).
- On July 24<sup>th</sup> 2009, the European Commission launched a call for proposals as part of the European Parliament's Pilot Project on "Pan-European Coordination of Integration Methods for the Roma". It deals with initiatives in the following areas: early childhood education and care, self-employment and microcredit, information and awareness raising. The maximum budget allocated by the European Union for the project is €4.5 million. The closing date for participation is 25 September 2009 for all areas of action. All the documents can be found [here](#).
- Since July 2009, Sweden has taken on the rotating presidency of the EU for 6 months (to be followed by Spain): among the priorities will be a progress in the debate on territorial cohesion, an evaluation of the action plan accompanying the European Union's territorial agenda, the launch of a debate on "macro-regional" strategies following the recent adoption of the Baltic Sea regional strategy.

**Key dates of meetings during the Swedish Presidency of the European Union:**

- 10-11 November in Göteborg – conference on local and regional implementation of the future Lisbon Strategy
- 10-11 December in Kiruna – "Cohesion Policy and Territorial Development" conference

Past developments

- Debate on how to adapt cohesion policy as a result of the crisis is currently going on: the European Parliament unanimously adopted the European Commission's proposal to change costs eligible to the [ESF regulation](#) (changing eligible costs) and supported as well a refocusing on energy efficiency in housing in the purpose of social cohesion. More information on the changes proposed can be found in [EAPN's presentation](#) on the issue as well as [here](#).
- In line with EAPN's recommendations, the 2009 Joint Report on Social Inclusion and Social Protection, published early March, calls for a strengthening of the interaction between the European Social Fund and the Open Method of Coordination on Social Protection and Social Inclusion. Its

supporting document also contains information on how the funds have been implemented in the purpose of inclusion in the Member States. More detail can be found on the Commission's [webpage](#).

- In January 2009, Commissioner Hubner presented the Commission's priorities for cohesion policy in 2009: moving forward on debate around the future of the funds (2014-2020), adapting the funds and boosting their use as a result of the economic crisis, setting up of an expert group on simplification which should publish its results in May.
- In January 2009, the Czech Republic has taken on the rotating presidency of the EU for 6 months (to be followed by Sweden): among the priorities will be simplification of the funds, debate on the future of cohesion policy (major conference organised on 26-27 March in Prague).
- The European Commission is currently undertaking a study on how to improve the links between structural funds and the Social OMC. EAPN has contacted the European Commission ESF unit to contribute. In addition, the topic was identified as a priority within the 2009 Joint Report on Social Protection and Social Inclusion.

### EAPN Activities

An indicative work programme for 2009 on structural funds can be found [here](#).

#### Upcoming activities:

- **On November 5<sup>th</sup> and 6<sup>th</sup> 2009 the EAPN structural funds working group will meet in Lithuania. A draft Agenda will soon be available.**
- **EAPN is preparing a public answer to the Barca Report which will be sent to the European Commission by the mid-September 2009.**
- **EAPN is finalizing a political messages paper based on the information compiled in the Social Inclusion Survey.**

#### Past activities

- **On May 30<sup>th</sup> 2009, The EAPN structural funds working group met in Vienna.**
- **The EAPN Social Inclusion Survey has been finalized. It can be found [here](#).**
- **The EAPN SFWG Internal Briefing on the Barca Report has been finalized. It can be found [here](#).**
- The structural funds working group met on 6<sup>th</sup> February 2009. Key issues on the agenda will be the EU recovery plan, transnationality and the 2009 work programme.
- In February 2009, EAPN contributed to the European Commission consultation on territorial cohesion ([link](#)). The contribution insists in particular on the need to put social cohesion at the centre of the debate.
- In January and February 2009, EAPN inputted in the European Parliament and Commission debates around simplification and modification of the funds as a result of the crisis.
- 11 February 09, Elodie Fazi (EAPN policy officer) took part in the meeting of the Community of Practice on Partnership in Vienna.
- On 8<sup>th</sup> December 08, EAPN organised a joint seminar with the European Disability Forum and CECODHAS (social housing), aiming to review the state of play of the current programming period, from a social inclusion perspective. The seminar put a strong focus on how to mobilise structural

funds as part of the EU recovery plan. A short report can be found on the [EAPN website](#). Presentations can be downloaded [here](#).

- EAPN published an analysis of the National Reform Programme (Lisbon Strategy) with a specific section on how structural funds contribute to meeting the NRP's objectives.
- On 30-31 October 08, EAPN held a capacity building seminar on structural funds. Click to [see the notes](#).

### **Background information**

The Structural Funds and the Cohesion Fund are intended to narrow the gaps in economic and social development among the regions and Member States of the European Union. Representing more than one third of EU's budget, the Funds constitute substantial financial assistance that shapes the long-term development of the recipient countries and regions.

**New challenges for 2007-2013** – For the period 2007-2013, cohesion policy will benefit from 35.7% of the total EU budget (347.41 billion euros), and its general framework has undergone major reforms to tackle challenges raised in particular by enlargement. Aiming at a more strategic approach, and a more decentralised management, the new Cohesion Policy has been concentrated on [three main objectives](#), each targeting specific types of [regions](#) and [Member States](#):

- convergence (81.54% of funds, mostly targeted at regions with a per capita GDP at less than 75 % of the Community average);
- regional competitiveness and employment (15.95%);
- European territorial cooperation (2.52%).

These objectives are to be met mostly through three funds: European Regional Development Fund ([ERDF](#)), the European Social Fund ([ESF](#)) and the [Cohesion Fund](#) (Member States whose GNI is lower than 90% of the EU average). New financial instruments have also been created to support innovative approaches and cooperation with the European Investment bank: [Jaspers, Jeremie and Jessica](#).

For the first time, strong coherence between cohesion policy, the Lisbon and Gothenburg strategy is also required: according to the “earmarking” process, at least 60% of the funds (in convergence regions, 75% for competitiveness regions) should be targeted towards [Lisbon related fields](#) supporting a “growth and jobs” approach.

**What can the funds do to tackle poverty and exclusion?** Although primarily known for their contribution to growth through support to physical infrastructures, structural funds have significantly contributed to tackle poverty and exclusion since the creation of the ESF in 1957 and ERDF later on. This was achieved by supporting a wide range of projects more or less directly employment-related, ranging from community support to formal, but also non formal education and training, support for access to services....

**The process: where are we now?** The [2007-2013 process](#) of adopting national and regional frameworks is marked by a strong degree of decentralisation. The Funds' budget and the rules for its use ([regulations](#)) are decided by the Council and the European Parliament on the basis of a proposal from the European Commission. These are completed by a more strategic document, the [Community Strategic Guidelines](#), in charge of ensuring coherence with the general objectives of the Union. On this basis, each Member State has to submit a National Strategic Reference Framework, outlining broad priorities, to

be negotiated and validated by the European Commission within three months upon reception.

**Timeline:**

**Member States' annual report on implementation of the funds (to be sent by June each Year)**

**Debate on future of structural funds: ongoing**

**Responsible for the Structural Funds process:**

National level: National Ministries (mainly, Finance Ministry; but also Social Affairs, Employment, Environment may be involved, to a lesser extent). In decentralised Member States, regional authorities may have a relevant role in the process.

EU level:

European Parliament: Regional Development Committee

Commission: DG REGIO, DG EMPL., Employment and Social Affairs Committee. Contacts to the relevant EC officials are provided in the following documents:

- [Contact to ESF desk officers](#) (available from the secretariat)
- [Commission directory](#)

**Background resources and documents**

[Website of the European Social Fund](#)

[EQUAL website](#)

[Interreg IVC](#)

[URBACT](#)

[Inforegio website](#)

[Compilation of quotations from structural funds key documents, relating to social inclusion- \(EAPN internal document\)](#)

[Structural funds regulations](#)

[Division of resources by Member State](#)

[Fact sheets by country](#)

**EAPN key positions and past action**

**Making a difference to tackle exclusion** - Since the 90', EAPN has been involved in advocating the European institutions to promote a legal framework for the Structural Fund policy which promotes the fight against poverty and social exclusion. It has also worked closely with National Networks and member organisations to enhance a stronger NGO involvement in the Structural Fund process both at national and European levels, and to provide timely information for a better access of NGOs to all stages of Structural Funds.

**Challenges for 2007-2013** - EAPN is rather satisfied with the 2007-2013 structural funds legislative framework, which has picked up some of our amendments to strengthen the social dimension of the Funds and the principle of partnership with civil society. However, the regulations represent only a first step and it is crucial to ensure their spirit is applied throughout all the process, from design to planning and monitoring. EAPN will thus continue claiming for the following concerns to be taken into account:

Building upon the strengthened partnership principle - For the first time, Article 11 of the Structural Funds regulation explicitly recognizes the principle of partnership with civil society organisations, which “shall cover the preparation, implementation, monitoring and evaluation of operational programmes”. Implementing partnership across the whole SF process is an obligation upon Member States, but the quality partnership takes various faces across the EU.

Lisbon “earmarking” and approaches to social inclusion - The new Cohesion Policy for 2007-2013 restates the importance of the social inclusion dimension in the Structural Funds. However, in line with the renewed Lisbon Agenda, the emphasis on jobs, competitiveness and growth hinders a rather holistic approach to socio-economic development which takes seriously into account the root causes of poverty in Europe.

Providing the right framework for NGOs to access the funds- To ensure that the funds deliver on tackling poverty, it is crucial to enable access of those organisations engaged with the most excluded, and to provide tailored mechanisms. Key tools for NGOs to further engage in the SF process, Global Grants and Technical Assistance are acknowledged in the regulations but provided by only a minority of Member States.

Mainstreaming of EQUAL - One of the success stories of the last round of the structural funds was the Community Initiative Programme (CIP) EQUAL, which operated on the basis of social inclusion, innovation, transnationality, empowerment and the bottom-up approach, with over 2,000 projects, mainly for NGOs. There will be no CIPs in the new round, but the Community Strategic Guidelines expressly required that these principles be mainstreamed in the new round (namely innovation, transnationality, partnership and gender), as well as of the types of action it supported..

Building on the potential of new programmes and financial schemes - Within or along with ERDF and ESF, a number of programmes and funding mechanisms can have an impact on the fight against poverty, and it is crucial to ensure this potential is not lost. This concerns in particular [URBACT II](#), which aims “to improve the effectiveness of sustainable integrated urban development policies in Europe with a view to implementing the Lisbon and Göteborg strategies”, and the new Joint European Resources for Micro to medium Enterprises, [Jeremie](#), which should promote increased access to finance for the development of micro, small and medium-sized enterprises, partly inspired from the local social capital initiative run by the Commission in 2001.

#### **EAPN key references**

All EAPN documents, including EAPN’s response to the SF Regulations, the Community Strategic Guidelines and the Communication on Cohesion Policy and Cities can be accessed on the EAPN website [www.eapn.eu](http://www.eapn.eu).

We invite you to look in particular at the new specific [public](#) and [members’ only](#) (password, 1515), pages on structural funds.

## **7. SERVICES OF GENERAL INTEREST /SOCIAL SERVICES**

**(Please note that this section will be reshuffled for the next issue of the Policy Brief).**

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### It is up to you! What you can do

- **Consultation on Responsible Lending and Borrowing in the EU: please give us your inputs on the consultation document.**
- **Third Energy Package: Member States will have to implement the legislative acts set out in this package and especially the directive concerning common Rules for the internal market in electricity which imposes some legal requirements to national governments about energy poverty (see details below). It's now time for you to start lobbying your government to get a national framework on energy poverty which will fully protect the rights of people experiencing poverty.**

### For information - Latest policy developments

#### Social Services

- **On the 8<sup>th</sup> of June 2009, the EPSCO Meeting was dedicated to Social services as a tool for active inclusion, strengthening social cohesion and an area for job opportunities. In the context of the economic and social crisis, the need of social services is all the more crucial to mitigate its social impacts. But, there is no legally binding proposal. The proposals are the following :**
- **A voluntary Quality Framework for social services which aims at providing guidance on methodology to set up, monitor and evaluate quality standards for social services, which is to be developed within the Social Protection Committee with the support of the Commission**
- **Exchange of good practices among the Member States as regards access to sustainable and high quality social services.**
- **Encouragement of the use of existing EU tools (European Commission's interactive information service for the application of Community rules in the field of SSGI.**
- The Czech Presidency organised a conference on Social Services of General Interest on 22-23 April. Please [click here](#) to see the intervention of Ludo Horemans, EAPN president.
- In December 2008, the Social Protection Committee adopted [Operational Conclusion](#) on the applicability of Community rules to SSGIs. They insist on the necessity to further disseminate information to increase legal certainty and identify three themes which should be subject to further analysis: the cooperation between public authorities, the role of non-profit providers, public procurement procedures and alternatives to these procedures.
- A Social Protection Committee working group has been set up to work on SSGI and in particular the development of Quality Principles.
- Access to Social Service is also one of the key pillars of the Commission's [Active Inclusion](#) approach (see specific section in the policy brief).
- The French Presidency held the 2nd Forum on Social Services in Paris on the 28th and 29th October 2008. EAPN participated as a speaker. More information can be found [here](#).

- On the 3<sup>rd</sup> of July 2008, as part of the renewed “Social Agenda” package, the Commission published the "First biennial report on the situation of social services of general interest in the EU" (see [MEMO/08/465](#)). The report contains an analysis of the role and situation of social services of general interest in Europe as well as the challenges faced.

### Health Services

- **The Commission launched in February 2009 consultation on health inequalities.** It will be followed by a Communication at the end of 2009 (after consultation of the SPC), which should propose a multi-fold approach but no specific legislation (to be defined: dialogue through an OMC, mainstreaming in key policies, health inequalities targets...). **EAPN contributed to the [Social Platform’s response](#).**
- In December 2008, the Commission launched a consultation on mobility of workforce in the health sector, under the form of a Green Paper. The aim is to review how to respond to common challenges such as mobility, recognition of qualifications and workforce shortage in some countries.
- A proposal for a [Directive on the Application of Patients’ rights in Cross-Border Healthcare](#) was published on the 3<sup>rd</sup> July 2008 as part of the social agenda package. Member states are already highlighting the unworkability of the current proposals, in clarifying patient's rights, member states responsibilities and dealing with subsidiarity, during a stakeholder debate held in the Parliament on July 15th. MEPs also highlighted that it would lead to a confirmation of 2-tier Europe with different services for the poor and the wealthy as to get the cross-border services you need to pay up front. For more information see [EURACTIV summary](#). See also EAPN briefing on the [Renewed Social Policy Agenda](#).

### Services of General Interest

- Hope from the new Protocol/Lisbon Treaty - The main hope for a way forward on SGI is currently focussed on the implications of the new Protocol 26 of the new Lisbon Treaty (See background information). Some actors have started campaigning on the issue: ETUC (European Trade Union Confederation) in particular is calling for: immediate implementation of the new treaty (once ratification is complete), the setting up of a Council working party to deal with transposition and for the EP to make a full report of the consequences. A further proposal by ETUC is the introduction of a social clause which would have as its objective the clarification of the relationship between the internal market and fundamental social rights, which should be introduced in all single market legislation
- The independent expert report on the Horizontal Evaluation of Network Industries highlighted some key failings in the current procedure – particularly the lack of independent assessment, and the limited social data and evaluation, which insufficiently dealt with consumers and users doubts about the success of liberalisation of the market in producing better conditions lower prices. The European Parliament has called for a report to be made in 2007 to assess the impact of liberalisation on SGI. For 2009, the current limited economic evaluation, led by DG ECFIN, will continue.

### Energy

- **On 25 June 2009, the Council unanimously adopted the package of legislative measures concerning the internal energy market, approving**

all the European Parliament's second reading amendments (see just below).

Consequently the procedure at the EU level is ended.

- A summary of the procedure can be found [here](#).
- The directive concerning common rules for the internal market in electricity can be found [here](#).

The Member States will have 18 months to transpose it into their national legislation.

- On 22 April 2009, the European Parliament adopted its [resolution on the Internal Market in Electricity](#), tabled in second reading by Rapporteur Eluned Morgan (PES). The text recognizes energy poverty as a "growing problem in the Community", calls on Member States to develop "national action plans or other appropriate frameworks to tackle energy poverty", "ensure the necessary supply for vulnerable customers", develop integrated approaches (in particular through social policy and energy efficiency measure). It also encourages Member States to define vulnerable customers and prohibit disconnection in critical times. However it represents a compromise with the Council, and as such appears weaker than the previous version adopted by the Parliament last year (tabled in *first* reading). References to a common definition of energy poverty and pricing measures were taken out. The amended proposal now has to be formally adopted by the Council, but few changes are expected at this stage. A summary of the procedure can be found [here](#).
- The [European Parliament Resolution on a European Charter on the Rights of Energy Consumers](#) was adopted in June 2008. It stresses the need for a more binding nature to enforce customer's rights and to turn the Charter into a legislative document linked to the Directives on Energy. It further calls for better use of public service obligations to support vulnerable customers including a social default tariff and for all Member States to set up a National Energy Action Plan addressing Energy Poverty.
- Declaration on Energy Poverty. Several MEPs have proposed a parliamentary declaration on energy poverty, calling on the Commission and member states to take urgent action on the proposals in the Energy Package. Despite strong lobbying by EAPN members and other NGO's, only 160 signatures were gained. So the Declaration fell end of 2008.

## Financial inclusion

On the 15<sup>th</sup> of June, the European Commission launched a consultation on Responsible Lending and Borrowing in the EU . You can find the consultation document [here](#). The consultation will last until 31 August 2009. This consultation follows the one recently closed about "Financial Inclusion: Ensuring access to a basic bank account"). It aims at restoring consumer confidence in the banking institutions, which has been very affected by the financial crisis. Points of interest in this Consultation might be as follows:

- The emphasis on on-line tools as a way of educating, guiding and advising consumers e.g in the paragraphs on "risk guidance" and "responsible borrowing" .
- The question of non-binding, voluntary approaches versus a more enforceable, regulatory EU-wide approach e.g on the topics "pre-contractual information", "advice standards" "framework for

intermediaries in the EU", "registration, licensing and supervision of credit intermediaries

- The questions of the credit products suitability and of reviewing creditworthiness assessment procedures are also addressed.

After that, the Commission will organize a hearing on Responsible Lending on 3 September 2009 to discuss with stakeholders on the most appropriate policy responses. The European Commission will decide afterwards the next steps.

## EAPN activities

### Services (general)

#### Social services

- On 23 April 2009, Ludo Horemans, EAPN President, contributed to the Czech Presidency conference on Social Services of General Interest. Please [click here](#) to see presentation.
- On 9<sup>th</sup> February 2009, EAPN took part in the kick of conference of the CEN workshop on Common Quality Framework for Social Services, part of the [EQUASS project](#)

### Energy

#### Financial inclusion

- EAPN will contribute via the Social Platform to responde to the consultation on responsible lending and borrowing in the EU.

## Background information

- For more information, please see EAPN Briefing on SGIs, and [EAPN explainer on services of general interest](#)

### Services of General Interest

Services as diverse as healthcare, telecommunication, social services or energy have a key role in ensuring social cohesion. They all have in common to have faced major changes over the last decades, as a result of both EU integration and the so-called "modernization" of welfare states: new relation between providers and users, privatization leading to increasing consumer choice but also in some cases higher prices for the most basic services.

Representing 75% of EU jobs and 65% of GDP in the EU, and having a strong growth potential, they have also been at the centre of the revised Lisbon Strategy. This led to the adoption of the much debated Services Directive<sup>1</sup> in 2006, which aims at "eliminating obstacles to trade in services, thus allowing the development of cross-border operations".

<sup>1</sup> See EAPN explainer on the Service Directive

However the EU has recognized that many services are of important public or “general interest”, and require specific safeguards to ensure that their public service obligations are met – in particular access, continuity, affordability, and quality. A key debate has therefore been to identify which services should be “protected” from EU internal market rules, how this should be done, and how to approach those sectors that are the most essential to social cohesion.

Following the publication of the [White paper on services of general interest](#) in May 2004, the Commission proposed a more systematic approach. The Lisbon Treaty went some way towards clarifying the situation, by entailing a [new protocol on SGIs](#), which emphasizes the EU shared values with regard to SGIs and gives what can be seen as a [definition of public service obligation](#). A reworded article 16 (now article 14) also stresses the joint responsibility of the EU its Member States and establishes a [new legal basis for the EU](#) to take further legal action.

Yet the European Commission made it clear in a 2007 Communication that it did not intend to push for horizontal legislative framework and would keep moving on the line of sector specific legislation (or quality framework in the case of on social services). It remains to be seen how other actors (e.g. Parliament) would make political use of the new legal basis in case the Treaty is ratified.

### **Social services**

Social Services of General Interest have been only partly taken out of the scope of the Service Directive, which left some questions opened on the applicability of internal market rules in the sector. The 2007 Commission Communication on SGIs and SSGIs went somewhat towards giving a definition of the specificity of social services and stressed the need to ensure the promotion of quality “in a more systematic manner”, raising the difficulties of applying Community rules – particularly public procurement and state aid. Rather than proposing new sector specific legislation, the Commission proposed:

- To [clarify legal uncertainties](#) on the applicability of internal market rules through a ["Frequently Asked Questions" \(FAQ\) documents](#) and [interactive information service \(IIS\)](#) operational since January 2008
- To [boost the quality of SSGIs](#) through the definition of a *voluntary* EU Quality Framework.

For more information on SGIs and specific areas (health, financial inclusion, energy), please see EAPN briefing on SGIs (April 2009).

### **Energy poverty**

Following EU pressure to rapidly complete the internal market in Energy, the sector faced major changes over the last years: opening up markets to private actors, *supposedly* leading to increasing consumer choice. Yet it was also accompanied by a major increase in prices, which led to a more and more Europeans being considered as [energy poor](#). The (still limited) steps taken to protect the “most vulnerable consumers” and take increasingly account of energy poverty thus remain subject to heated discussions.

- In particular, the Commission (DG TREN) published a communication – [Towards a Charter on Energy consumers rights](#) followed by a [consultation](#) which ended in September 2007.
- The revision of the third legislative package has been discussed since 2007, which led to a better – but still limited – acknowledgement of energy poverty.

**Responsible for:**

**National Level:** National Ministries with responsibilities for economic affairs and enterprise

**EU Level:** Directive on Services: DG [Internal Market and Services](#), Directorate E, [Secretariat General](#) in the EU Commission

**DG Employment:**

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**Background resources and documents**

[Internal Market site](#): Commission Documents on the Services Directive

[Parliament Documents: related to the Services Directive](#)

Documents related to the [Communication on Social Services of General Interest](#) site

[DG TREN site](#): Documents related to Energy Directive and the Energy Charter are available on the

**EAPN key positions and past action**

EAPN's work on services focuses on the following priorities:

The refusal of the EU to establish a **strong horizontal framework** on all **Services of General Interest** as a balance to the liberalization of the market through the Services Directive and other sectoral initiatives. The unwillingness to affirm the **overarching priority** of a social Europe = guaranteeing the implementation of **universal services obligations** (accessible, affordable, quality services) and ensuring their priority over and above the interests of the market.

The **limited exclusion of social services from the Services Directive**, the separation of health services from social services, with its own legal process and and the development in 2008 of a proposal for a health directive on cross-border services.

The **lack of progress** on developing a specific EU framework for social services.

The reticence of the Commission to **objectively assess the impact of liberalization and privatization** on users and particularly on the poor. A good example of this is to look at what has really happened to energy prices, access, continuity and quality of supply with liberalization based on the real experiences of the poor.

Above all, the **lack of active stakeholder** involvement in the debate and the design of policy proposals, the horizontal evaluation of Services of General Interest, or impact assessment procedures, particularly of the people most affected – people experiencing poverty.

### **Past action**

EAPN has contributed to the work of the Social Platform to develop a Social NGO contribution to key debates around SGIs and SSGIs. From 2007 to 2008, EAPN has set up an adhoc Group on Services, which aimed to help EAPN engage better with the complex field of SGI and SSGI and to actively develop briefings and position papers to highlight EAPN concerns. The work on services has now been mainstreamed and will be followed up within the Social Inclusion Working Group. Some key actions:

- Together with the Social Platform, EAPN campaigned against the Services Directive on three key areas: get Services of General Interest excluded from the Directive, get the specificity of social and health services recognized and excluded, get the “country of origin” principle abolished, which could have led to social dumping.
- EAPN has been actively involved with the Social Platform in other debates on the future of SGIs in the European Union, advocating for a strong framework and acknowledgement of the Universal Service Obligation.
- SGIs were a strong focus of the 7<sup>th</sup> People Experiencing Poverty Meeting (2008)
- EAPN Published a [glossary on services of general interest](#) and an [explainer on the Service Directive](#)
- EAPN has responded to [the Consultation on the Charter for Energy Consumer's Rights](#) and has been active in lobbying around the revision of the Energy Package.