

EAPN Policy Briefing # 27

September/October 2009

Foreword

Dear members,

The return from the summer has been a very busy one. President Barroso got the endorsement he was seeking as President of the Commission and published his new Guidelines for the new Commission, setting out his vision for the post 2010 strategy. However, the consultation paper, supposed to be published on the 20th October, has been delayed again until to November. Barroso came to the Spring Alliance conference on the 28th September to defend this vision and was pressed on the lack of a clear social dimension, by EAPN and others.

Meanwhile EAPN and social NGO's have been engaged with the Round Table, presenting our key messages – on post 2010, reinforcing the social OMC, the social impact of the crisis and political legacy for 2010. This followed closely on the publication of the 10 key demands from the 8th Meeting of People experiencing poverty. A positive development has been the publishing of the Independent Experts assessment of minimum income schemes, as part of the follow up of the Active Inclusion Recommendation, which clearly confirms the inadequacy of current schemes, and need for an EU framework. EAPN has also been pressing home its messages on Cohesion policy and the new Barca report, and making steps forward for building stronger alliances with trade unions in a joint event organized with the support of the ETUC in September..

Developments for the EU Year 2010 continue to progress, although rather slowly in many member states, but several countries have now got out their calls for proposals. The NGO stakeholder group is finalising its key messages paper for 2010.

In November, all our working groups will be meeting, with 1 day capacity building events and working group meetings.

We look forward to seeing you all and planning our next steps together!.

Sian Jones, Policy Coordinator with the Policy Team: Fintan Farrell, Amana Ferro, Vincent Caron, Claire Champeix and Pauline Geoghegan.

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 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 or by telephone on 00 32 226 5859

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1. 2010 EUROPEAN YEAR FOR 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 the national correspondents of the Commission's Communications campaign (contact the EAPN secretariat for details)**
- 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.
- **Inform yourselves on your national calls for proposals.** 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 (NIBs) and the national programmes

All member States have appointed their NIBs, which have prepared their national programmes for the European year 2010, have submitted them and been approved by the European Commission, with the exception of Latvia, which has funding problems, and for which a special programme will be organised by the Commission. Most programmes are now available on the Commission website on <http://ec.europa.eu/social/main.jsp?catId=808&langId=en>

The programmes reiterate the challenges presented by the latest National Strategic reports on Poverty and Social exclusion. The detail of activity outlined in the programmes varies to a great extent across the countries, from the very specific (Austria) to more of a framework approach based on the EY objectives, as in Belgium. Similarly, some have defined very clear calendars of activities, events etc (Ireland) and most others still have to detail their activity plans.

Member States' calls for proposals for EY2010 activities are now available for several countries (Austria, Belgium, France, Germany, Luxembourg and the UK), however there may be more that we are not aware of since they are not published on the Commission's website. There is a wide disparity in deadlines for projects to be submitted, currently ranging from the end of August (August 31st in Austria) to early November (November 6th in France). Start times for projects also vary between countries with some countries naming January 1st for the start of activities, and other postponing this until early March, the date by which funds are expected to be transferred by the Commission. Ostensibly some MS are willing to start in advance of this date.

The programmes for Belgium and Greece specifically mention the need to support Non Governmental/small Organisation activity, and the Belgian programme goes as far as stating that 50% co finance may not necessarily be compulsory in the case of some projects for small NGOs.

Since it seems that the financing contracts between the NIBs and the European Commission will be signed in January 2010, this may mean that the NIBs may only receive the first instalment of funding (80%) in February 2010, and therefore NGOs who manage to secure funding through their national programme may experience delays in payments. The Commission's timeline, as detailed in the Strategic Framework Document, envisages activities commencing in March / April 2010.

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

European Commission

- The European Commission is responsible for coordinating and implementing the activities for the Year.
- The *Taskforce for the European Year* is headed by Anne Degrand-Guillaud in DG Employment Unit E2, as above.
- A *Consultative Committee* including representatives of all the National Implementing Bodies (NIBs) met on 17 April for an

information exchange. Two NGO representatives, including EAPN, were invited to participate in part of this meeting, and again on 8 October, when the Committee discussed progress with the NIBs, and the Communications campaign for the European Year.

- The EAPN Secretariat has taken part in two meetings of the EU *Stakeholders Expert Group*, entailing representation from EU level NGOs, regional and local authorities, social partners, EU agencies, international organisations, foundations and think tanks, on 3 March and on 17 September 2009. The last meeting focused mainly on the Communications strategy for 2010, as described below.

The European Commission has presented their preliminary plans for the year. The main efforts so far are around the communication strategy. They have also informed us that they are starting discussions on developing the messages for 2010 with members of the Social Protection Committee.

Commission Communication strategy

The European Commission has contracted the media agency, Mostra <http://www.mostra.com>, to 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 National Implementation Bodies, providing media crew to cover events, support to create websites, organising press conferences, etc. NGOs are hoping that the national correspondents of the Communications agency will also cooperate with national NGOs to support their activities during the Year.

With the aim of ensuring that the communication strategy gives visibility to the work and perspectives of organisations working on the ground, EAPN has met with the communications agency in July, and took part in the EU year Stakeholders' meeting on September 27th which concentrated on aspects of the Communications campaign. Topics covered included the communications plan for the European Year, an update on the national programmes and the involvement of stakeholders.

In relation to the latter, an *Advisory Board* of ten people has been set up in relation to the Communications strategy for the Year, of which eight NGOs (European and national level) and two cities/regions networks. The EY 2010 Steering group agreed a process of nominations to this board, consisting of a mix of policy and communications specialists. Other issues concerned the selection of EY 'Ambassadors', the Media conference (programme and participation), journalists' contacts, and what kind of practical support is available for EY activities. The Advisory Board, which includes two members of the EAPN secretariat and representatives from three EAPN national networks, will meet on October 21st. A link to the Year can be found [here](#).

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. **In the context of the European Commission's 'For Diversity. Against Discrimination' Anti Discrimination Campaign's 2009 Annual award for Journalism**, a special award will be made for articles on how discrimination can lead to poverty. EAPN was asked to submit proposals for one person from each national network to take part in the Jury panel for each country. Following contact with the networks, nominees from most national networks were forwarded to the Commission. The European level winners of the 2009 special awards are due to be announced during the EY 2010 Opening event in January 2010. The award for journalists planned for 2010 will be along similar lines as the special award in 2009.

- **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.)

The European Commission has picked up the idea of NGOs to organize EU focus weeks in Spring and Autumn. 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 annual Round Table , under the Belgian Presidency, will also take place at this time.**

- **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.

EAPN Activities

EAPN Networks

In many countries our networks have been involved with the NIBs to plan for the Year and to design the national programme. Some networks have already formulated concrete plans of activities while others are awaiting the outcomes of calls for proposals to finalise their plans.

As the plans of EAPN members become more concrete we will gather the information and make sure to disseminate it within our network so that we can get inspiration from each other. As soon as the NGO 2010 web site is up and running, we will publicise national events and activities on this platform.

National Focus weeks

The EAPN national networks, with the exception of the Netherlands, Estonia and Latvia, have indicated the dates for their national focus week (see the calendar below). We are promoting the idea that the NIBs should support activities during this week.

Even though Member States might be asked by the European Commission to organize some kind of activity during the first EU focus week, or for the opening of the Year, there really should be no contradiction in also supporting activities during the national focus week.

EAPN Europe preparations

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 seminars

EAPN will organize three European events during 2010 linked to the European Year

- **Conference on the political legacy for 2010**, in Ireland on February 19th 2010
- **Seminar on Globalisation and Migration**, in Cyprus on June 12th 2010 (*tbc*) (linked to the EAPN General Assembly)
- **Conference on Minimum Income/Social Standards**, in Belgium on September 23-24 2010 (in liaison with the Belgian EU Presidency).

EAPN publications

EAPN will prepare publications to mark the European year: Poverty explainer (already published), Wealth explainer, Adequacy explainer, Stock-taking document, and a new EAPN leaflet. Other plans include a video on good practices combating poverty and social exclusion, a booklet on participation and governance in the OMC, and written portraits and videos for the website.

NGO cooperation at European level

EAPN Europe is continuing to coordinate a broader NGO coalition at European level. **The objectives of this coalition are to:**

- **build understanding and support for the individual objectives of different networks for the year**
- **build as much consensus as possible across the NGO sector on the outcomes of the year**
- **drive forward key projects for the year**
- **build alliances with other actors to ensure a successful 2010**

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 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. **These are currently being finalised (October 2009), and call for**

- **an awareness-raising campaign on the structural causes of poverty and the role of the state in the realisation of economic and social rights for all**
- **financial investment local, national and EU levels to achieve enhanced dialogue with people in poverty and anti poverty NGOs**
- **a strong political legacy from 2010, to include a new overarching and sustainable EU strategy based on fundamental rights, a revitalised EU Social Inclusion strategy which ensures progress on agreed National and EU poverty targets, progress in relation to the accessibility and affordability of services of general interest and a framework directive aimed at achieving real progress on the adequacy and accessibility of minimum income schemes**
- **an EU poverty programme and the use of structural funds to underpin EU commitments to fight poverty and social exclusion.**

- **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 www.endpoverty.eu in October 2009. **Contents will include information on the European Year, a section on What is poverty? (statistics, and voices of those experiencing poverty), the coalition and its members, what do we want (joint messages), country pages, a joint calendar of events (national, European, NGO, NIBs), and specific campaigns (such as the EAPN campaign on minimum income.**

- **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'.

Another idea, still to be developed, is to involve cultural institutions such as schools and libraries, in this awareness-raising activity

- **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, **now** possibly on October 13th, 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 (October 2009)).

Date	Country	Date	Country
1) Jan 4-10		27) Jul 5-11	Romania
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		31) Aug 2-8	
6) Feb 8-14		32) Aug 9-15	
7) Feb 15-21	Ireland	33) Aug 16-21	
8) Feb 22-28	Austria	34) Aug 22-28	
9) Mar 1-7	France	35) Aug 29- Sep 5	Norway
10) Mar 8-14	Slovenia	36) Sep 6-12	
11) Mar 15-21	Luxembourg	37) Sep 13-19	Lithuania
12) Mar 22-28	Hungary	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 Autumn Focus Week
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	Poland	46) Nov 15-21	Italy
21) May 24-30	EU Spring focus 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		50) Dec 13-19	
25) Jun 21-27	Germany	51) Dec 20-26	
26) Jun 28- Jul 4	Bulgaria	52) Dec 27-Jan 2	

Still to confirm: Netherlands, Estonia and Latvia

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.Degrand@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, +(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](#)

Most of the national programmes for the European Year for Combating Poverty can be found on the Commission's website at: <http://ec.europa.eu/social/main.jsp?catId=808&langId=en>

[EU webpage on 2010](#) (to be soon replaced by www.2010againstopoverty.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 for this purpose.

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 14th November.**
- **Respond to the draft EAPN report on the social impact of the crisis by the 4th November 09.**
- **Give EAPN your feedback on the minimum income report – particularly national reports by the 7th November**
- **Respond to the Questionnaire evaluating the Lisbon Implementation Reports on the Crisis by the 31st October.**
- **Contact your SPC and government representations to give your input on the social impact crisis, on the thematic year**
- **.Check the calendar of Peer Reviews to see if you can ask to participate as part of your country delegation and provide input to EAPN representatives to the Peer Review in Paris in December.**

Social Impact of the Economic Crisis.

The Greens, Socialists and Liberals are working together to highlight the social impact of the crisis and the need to defend social rights. A European Parliamentary declaration has been developed to defend social rights when fighting against the economic crisis (0056/2009), which needs half MEP's to sign in order to force a response from the Commission. This includes pressing for a proper social impact assessment of the crisis, and social conditionality in the loan conditions of the IMF and the Commission to new member states like Latvia, Romania and Hungary.. See: <http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//NONSGML+WDECL+P7-DCL-2009-0056+0+DOC+PDF+V0//EN&language=EN>

At the SPC meeting on the 1 and 2 July, a roadmap and skeleton was agreed for the 2nd monitoring report on the social impact. The questionnaire will be completed by Member States between the 22nd September and 12th October. The draft joint SPC/COM Monitoring report will be presented in the SPC meeting on the 21 October and adopted on the 10th 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: 1st 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

15 – 16 May, 8th Meeting of People Experiencing Poverty.

The Report of the 8th European Meeting of people experiencing poverty was launched on Tuesday 13 October, clearly calling for a more social Europe. The EU institutions were asked to respond to a checklist of 10 key demands which were drawn from the report of the 8th Meeting.

- See the full list of [10 key demands](#)
- See the full report of the 8th EU meeting: In [English](#), In Czech: [Czech](#)
In French: [French](#)
- The DVD from the 8th EU Meeting will be available on EAPN's website [at the following link](#)

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 Round Table took place on the 16th and 17th of October, in Stockholm : “ Social inclusion in times of recession” - New challenges for the Active inclusion strategy.. **Key note speeches were given by Maria Larsson, Swedish Minister for Elderly Care and Public Health, the Swedish minister for Health and Social Affairs. Elizabeth Schroeder, MEP and Professor Joakin Palime, Uppsala University, with Nicole Tonneau making a powerful input, representing the 8th People experiencing Poverty meeting. The plenaries focussed on the OMC as a driving force for action, included Ludo Horemans, President of EAPN and the Antonia Carparelli, Head of the Social Inclusion Unit with parallel workshops focussed on different aspects to promote integrated delivery of active inclusion strategies including policy design, implementation and governance, and tools for social inclusion for vulnerable groups. 7 interesting site visits were organized highlighting different aspects of social inclusion, including social enterprises, coordinating health and social services, homeless services,**

The final plenary, promoted a lively debate involving Fintan Farrell, Director of EAPN, as well as the Director of FEANTSA and Eurochild and Social Platform and AGE-Platform representatives, on the conclusions from the workshops, with a panel discussion involving Commissioner Spidla, Philippe Coutard, Belgian Secretary of State for Social Integration, Martin Hirsch, High Commissioner and Jean Lambert MEP.

The main conclusions of the conference underlined the need for real progress on poverty and social exclusion in 2010 and in 2020, emphasizing the key role of the Social OMC. Strong backing was given to the need for implementation with agreed targets at EU and national level, for specific progress on implementation of Active Inclusion, including on minimum income, and to reinforce governance and participation. The importance of direct involvement of people experiencing poverty was underlined, and for them to be “not seen as the problem but part of the solution”. The National Action Plans were seen as key for engaging local and regional stakeholders, linked to national Parliaments. However, the weakness of the RT persists in having no clear link with the meetings of people experiencing poverty, nor mechanisms for pressing its conclusions/ demands in the EU policy making process.

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 15th June. A first discussion took place in the meeting on the 2nd 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:

- A study on housing exclusion carried out by University of York, started on the 15th of January 2009 will take 15 months to complete.
- A Peer Review on measurement of homelessness and housing exclusion in Austria.
- Several Mutual learning projects and the Network of Local Authorities Observatories
- Development of indicators on housing costs and housing deprivation
- Social Situation Report with a thematic focus on housing.

Minimum Income Report

The Core Team of the EU Network of Independent Experts on Social Inclusion has published its report on Minimum Income schemes in the European Union. The conclusions of the report are that most countries still don't have adequate systems in place to allow for a life in dignity, but underlines the crucial role of these schemes to reduce the impact of poverty. The Report presents 16 suggestions for action at national and EU level in order to improve Minimum Income schemes and to more effectively implement the principles outlined in the Active Inclusion Recommendation. Key proposals are made in the area of guaranteeing adequacy – including developing common criteria and supporting the development of an EU framework Directive, as well as on improving coverage and take up, and reducing the negative impacts of conditionality in integrated active inclusion strategies. Find the full report [here](#). The [independent expert national reports](#) have also been translated and published on the same 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 18th, 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 3rd 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 Employment and Social Affairs Committee of the European Parliament is finalising an assessment of the Social Open Method of Coordination by the end of October. EAPN and Social Platform have contributed actively to this assessment.**

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

- **The stakeholder conference has now been delayed until February 2010.**
- **The Draft Interim report is now available, see [here](#), including 27 country reports.**
- **Some EAPN networks have now been consulted.**
- **The latest information can be found on [here](#).**

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 19th 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 19th 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	Combining choice, quality and equity in social services	Estonia - Hungary - Italy - Lithuania - Portugal - Romania - Spain - The Netherlands - United Kingdom
5. - 6.5.2009	France	Alzheimer's and other related diseases: coping with behavioural disorders in the patient's home	Czech Republic - Finland - Germany - Luxembourg - Poland - Slovenia - The Netherlands - United Kingdom
27. - 28.5.2009	Greece	Integrated programme for the social inclusion of Roma	Finland - France - Germany - Hungary - Spain
15. - 16.6.2009	Germany	Ensuring a functioning healthcare system in regions with declining and ageing populations	Finland - France - Greece - Ireland - Portugal - Romania - Slovenia - United Kingdom
6. - 7.7.2009	United Kingdom	The City Strategy for tackling unemployment and child poverty	

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

15/16th October 2008 7th 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).

EAPN activities

In 2009:

Social Inclusion Working Group

The next meeting will be held on the 12/13 and 14th November in Copenhagen. See the latest agenda in the member's room.

The meeting will include a half day event on 2010 organized by EAPN Denmark, including inputs on good practice on poverty policy, with the participation of representatives of the Danish Government and the Commission, as well as EAPN. The 13th will involve a capacity building seminar focussing on poverty tools and instruments – particularly focussing on Poverty Reports/Laws and Targets. The 14th is a Working Group meeting which will include follow up on the Crisis Report, , next steps on minimum income, preparing the legacy for 2010, action on post 2010, as well as further work on the key working group outputs – wealth and adequate income explainer, and publication on the OMC and participation.

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 29th and 30th 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 4th September, to feed into a report on the social impact to be ready for the Round Table on the 17th 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 September/October:

Round Table

- **EAPN Sweden was actively involved as part of the organizing team for the Presidency, with particular responsibility for a workshop on supporting social inclusion and participation beyond the labour**

market and a site visit to Fryshuset - foundation for young people. 25 EAPN members participated from national networks, including 4 people experiencing poverty. Apart from active participation in all the conference sessions, EAPN provided speakers in the opening session, (Ludo Horemans/ President) in the plenary on the OMC, and two workshops on Policy coordination in practice (Slavka Macakova/EAPN Slovakia) and Supporting social inclusion and participation beyond the labour market (Izabella Marton, EAPN Hungary), as well as Fintan Farrell (Director) being rapporteur of the active inclusion workshop and in the final debate. EAPN prepared [key messages for the Round Table](#) which focussed on EAPN's 4 key concerns – which were presented by Ludo Hormans, EAPN President in the opening session.:

- 1) Growth and Jobs has not delivered on pledge to make a decisive impact on poverty – demand for a new EU2020 social and sustainable strategy which puts people and planet first
- 2) The Social Impact of the crisis has not been adequately addressed – demand for a social summit to defend public services and active inclusion.
- 3) The Social OMC must be supported and ensure delivery on the eradication of poverty – with focus on implementation, effectiveness and participation highlighting targets, link to the national level, effective involvement of stakeholders and link to Structural Funds
- 4) EU Year on poverty must be more than a series of events – the demand for a strong political statement for a decisive legacy for the EU year 2010.

The initial assessment of the Round Table, was support for strong partnership approach which engaged EAPN and other stakeholders in developing the programme, as well as for the quality of some of the exchanges and inputs. There was also satisfaction with the strong support given to key EAPN messages on the need for a political legacy, the focus on targets and minimum income, and the key role of people experiencing poverty. However, the lack of political backing for the RT, means that follow up on the conclusions/outcomes are not sufficiently visible at EU level.

Reinforcing the Social OMC

- EAPN represented the Social Platform, together with Eurochild in a meeting with the Social Protection Committee in Stockholm on the 14th September, pressing demands for the reinforcement of the Social OMC and support to a social and sustainable strategy for the EU 2020 agenda.
- EAPN represented the Social Platform, presenting proposals on reinforcing the Social OMC, in a meeting with the Employment Ctee of the European Parliament. EAPN made specific inputs to the consultants report.

Meetings with the Commission

- EAPN's President, Director and Policy Coordinator met with the new Director General of DG Employment: Robert Verrue on the 20th October, following a general meeting with the Social Platform. The main focus of the discussion was demands over reinforcing of the social OMC, the need to put poverty at the heart of the EU2020 agenda, and an adequate response to the social impact of the crisis and legacy for 2010.

- **EAPN met with members of the Commission and the Independent Experts in the preparatory phase of the independent experts report on minimum income. EAPN made significant inputs on the recommendations, many of which appear to have been taken up.**

In June/July:

- EAPN actively worked with members of the SIWG to organize the EAPN Seminar: Beyond 2010 on the 29th 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. The Social Platform will present this contribution to the SPC meeting on the 14th 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

3rd 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 15th of September, and at the latest by the 30th 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). The EAPN contact person in the unit is Peter Lelie (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).

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.
- 2nd July 2008: Commission Communication on proposals for [Reinforcing the OMC](#)
- 30th 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.

- **Give EAPN your response to the Minimum Income reports and support lobbying action.**

- 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.

For information – latest EU policy developments

- **October 16th**, Publication of the Independent Experts synthesis and national reports on minimum income schemes, as follow up on the Active Inclusion Recommendation. (See Social Inclusion section)
- **October 14th**, Mid-way workshop on Network of Local Authorities' observatories on active inclusion (NLAO). – held in Stockholm on the 14th September, with the participation of EAPN.
- Final conference of PROGRESS project: **Standard Budgets – an Instrument to Fight and Prevent Over-indebtedness and to Promote Financial Inclusion and Well-being** – organized by the ECTS, members of EAPN in Vienna on the 21 and 22nd of November.
- **29/30 October Peer Review** on a new qualification programme for people with reduced income capacity and without income support from the national insurance schemes, (NO) to be held on the 29/30 October. EAPN Norway and representative from EAPN Brussels will participate.

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.

Social OMC follow up on 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: 3rd pillar (access to adequate housing); 31 March: 2nd pillar (Make Work Pay, Labour Market transitions); 28 April: 3rd pillar (access to healthcare); 1 July: 1st 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.

EAPN latest action on Active Inclusion

- **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, which took 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](#) and developed [Key Messages](#) which were highlighted during the conference. Many of these messages were underlined in the concluding debates. EAPN is pressing for adequate follow up to the conclusions.
- **Input to Minimum Income Report.** EAPN met with Commission and Independent Expert coordinators to make detailed input to the report, linked to the Adequate Income explainer which is being finalized by the SIWG. The 16 recommendations of the report reflect many of EAPN specific proposals including the need for common criteria and common definition of adequacy at EU level, and a framework Directive.
- **EAPN provided input to the Mid-Term workshop of the Network of Local Authorities on Active Inclusion in Stockholm on the 14th October.** Several networks have been engaged in national debates.
- **EAPN Norway and Brussels are participating as expert stakeholder in the Peer Review in Norway on the 29/30 October on a new qualification programme for people with reduced income capacity and without income support from the national insurance schemes,**

- 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.

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

Minimum Income Campaign

- **The Secretariat is in the process of producing a scoping note for the next stage of the Minimum Income Campaign, to run in 2010. This note will be available for comments to the members of the MI contact group towards the end of the month.**

- **On 6-7-8 October, in the framework of a Civil Society Contact group event, EAPN was present at a stand in the European Parliament dedicated to poverty. It was a good opportunity to collect more signatures and to present our campaign and concerns to the new MEPs.**

- 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 signatures they have managed to collect and on the results of the media action.

- On July 2nd, 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://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 6th, 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.

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 24th 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 8th 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
[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, 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 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

4. THE LISBON STRATEGY

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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:

- Give your comments to EAPN on the draft EAPN report on the social impact of the crisis – by the 5th November.
- Following the publishing of the National Reform Programmes implementation reports on the Europa websites EAPN members should complete and return the EAPN questionnaire (2), built on their response to the Crisis questionnaire (1).
- Participate in the lobbying campaign with EAPN on the [EAPN position paper post 2010: An EU we can trust](#), pushing for a social and sustainable post 2010 EU strategy and a positive legacy for 2010 at EU and national level to input to the EU's debate and consultation.
- Send the EAPN model letter to your MEP's on the European Parliament Declaration on defending social rights in responding to the economic crisis.
- 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, as well as information on the post 2010 strategy (EU 2020)

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

July 2009

- **There has been a delay with the delivery of the 2009 Implementation reports of the National Reform Programmes, which now should be on the website by the 6th November 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 18th and 19th of June. The main focus was on the new Communication “A Shared Commitment to Employment, published on June 3rd. (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](#) (19-20th March 2009) focussed strongly on the crisis and in preparation for the G20 conference in London on the 2nd 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 9th. 3 preparatory workshop s will be held in Spain on the 15th April on Upgrading skills/Integration of youth: in Sweden on the 20th April on Increasing access to employment and on the 23rd April in Czech Republic on Maintaining employment and promoting mobility.
- On the 9 and 10th 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 4th 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. 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 28th 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 19th and 20th 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 16th 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 26th 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 15th 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)

The Spring Council was held on the 13th and 14th 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 3rd 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

Post 2010 Lisbon Strategy Discussions

New Policy Developments (October 2009)

- **The difficulties over endorsing the Reform Treaty, have led to delays in the publicized consultation over the post 2010 agenda. Originally the consultation paper should have been produced by the 20 October. Now it is envisaged to be published “some time” in November. The advice from the Secretariat General is to make any inputs based on President Barroso’s Guidelines document. They still hope to have a decision finalized by the Spring Council. This means that realistically there will not be a real consultation process, based on the EU guidelines (ie 8 weeks.)**
- **On the 3rd September, President Barroso presented his vision for post 2010 in the [Political Guidelines for the next Commission](#). Although there is some strong rhetoric about the importance of strengthening the social dimension, based on values and fundamental rights, and commitment to a social and sustainable vision, the detail on the social dimension is very weak, particularly in relation to defence of social protection, active inclusion and minimum income and access to services.**
- **29 September 2009 - the Commission presented the SPC report - their input to the post 2010 debate: “[Growth, Jobs and Social Progress](#)”. The report highlights the need to put social cohesion at the heart of the new 2010 strategy and is the strongest input by the SPC to date.**
- 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 15th 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 2nd October.
- The Joint SPC-ISG Task Force on Lisbon will present and discuss its final report on the 14th 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 21st October the SPC will discuss its contribution on the post 2010 agenda. This will be endorsed on the 10th November following the adoption of the EMCO contribution on the 27-28th 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, it's 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 begun 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

- **EAPN has supported the Greens, Liberals and Socialist Groups proposals on demanding a greater focus on social rights and social impact in the crisis. A model letter has been sent to members to lobby MEP's on a declaration (056/2009) on defending social rights in response to the crisis. The main demands are social impact assessment on the crisis, defence of social rights and demand for social conditionality in loan conditions by the IMF and the Commission in their dealings with Latvia, Hungary and Romania.**
- **October - EAPN published a [special edition of the Anti Poverty MAG on the crisis, with contributions from EAPN networks.](#)**
- **EAPN members have returned questionnaires on the crisis and a draft report on the social impact of the crisis has been circulated for feedback by the 5th November. The report will be published by the end of the year.**

- **EAPN members are asked to respond to the NRP implementation report questionnaire, assessing the responses to the crisis, once the reports are published on the website in November.**
- On the 20th July, EAPN sent out a questionnaire on the social impact of the crisis to its members on the 20th July, with response date by the 4th September. This will be followed by a further questionnaire linked the Implementation Reports of the NRP, with response date by the 31st 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 8th July, EAPN sent letters to President Barroso and Group leaders of the EP prior to Barroso's maiden speech on the 15th July. See: <http://www.eapn.eu/content/view/1067/77/lang,en/>
- On the 8th 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

- **September 2009: EAPN finalised a full colour print version of the EAPN position paper on post 2010: [An EU we can trust](#), which has been distributed to decision-makers. Lobbying actions by national network and at EU level continue throughout the Autumn and until Spring 2010.**
- **28 September, EAPN participated in the [Spring Alliance](#) conference launching the manifesto, involving President Barroso. EAPN presented social NGO's demands to Mr Barroso.**
- EAPN held its seminar on the 29th 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
- EAPN participated in the Spring Alliance interim seminar on the 17th June, in Brussels which tested out the draft manifesto on other stakeholders.
- The manifesto will be launched in Brussels on the 28th 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 28/29th 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 19th April in Frankfurt.
- EAPN also participated in the Alternative ECOFIN held in Prague on the 30 March – 1st 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 18th December 2008, coinciding with the EPSCO.
- The full report will be published on the 6th February (see 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 13th and 14th 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 **25th 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

- 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

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 20th and 21st in Greece
- 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).
- 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 Committee (EMCO)

At their last meeting, the EMCO identifies income inequality as one of the key employment challenges for the next decade, but didn't suggest any concrete measures to tackle it and does not make it a priority. They mention quality of work as possible key domain. There are several proposals regarding on how to improve the architecture. One refers to suppressing the narrative part of the Guidelines, as being too complicated for the common citizen to understand. Another one recommends replacing the macro/micro/employment structure with mainstreaming the guidelines throughout the strategy, rather than having three different pillars. Finally, there is a proposal to add new guidelines, especially interesting a social guideline as an extra pillar to Lisbon, “identifying social policies that do not relate to the labour market”. Interesting! Also, it was suggested to add a guideline on new jobs (green and white), as well as a guideline for

migration. Regarding governance in the Lisbon strategy, it is stated that the current model does not seem to put enough pressure on Member States. One proposal invokes the suppressing of the Cambridge Review as being ineffective. Another one is to strengthen the employment OMC by improving peer pressure through score or league tables, with a more visible benchmarking with indicators. Regarding targets, country specific and individual targets are thought to better reflect MS diversity, but a common European target is also suggested – the two would work in conjunction. Employment targets for 2020 include targets on lifelong learning, for physical mobility, employability and knowledge of foreign languages. The EMCO mentions explicitly the creation of jobs in social services. However, stresses strongly “a job-intensive growth based on flexicurity and employability of the workforce, while avoiding welfare dependence”. Measures are proposed to reduce early retirement, improper use of disability and sick leave, and strong active labour market policies. Measures to tackle undeclared work are proposed (nothing concrete though), as well as improving training and activation for excluded groups (long-term unemployed, low-skilled, migrants, disabled etc).

President Barroso’s vision for the next 5 years

On July 15th, European Commission President José Manuel Durão Barroso presented his [Political Guidelines for the next Commission](#). The text makes it clear that Employment is the number one concern in present times, and that stemming unemployment is a priority for a successful exit from the crisis. The document repeatedly mentions upgrading skills as the basis for more employment. President Barroso identifies fighting unemployment and promoting social cohesion as one of the 5 key priorities for the next Commission. He stresses the need for a stronger social dimension to fight rising poverty, removal of structural barriers to employment, especially for the young and the low-skilled, as well as for the ageing population. The phrase “inclusive and sustainable market economy” is recurrent in the document. Measures suggested to fight unemployment include also supporting short time working arrangements combined with training, while flexicurity principles are still to be implemented. The huge potential of “green” and “white” (=social) jobs is underlined. The document also strongly outlines the need to create decent, quality jobs, strengthening workers’ rights by promoting work-life balance and improving working conditions, but also pursuing active labour market policies and flexicurity. A more inclusive Europe should be based on gender equality, eliminating the gender pay gap, diversity, anti-discrimination and equal opportunities. Finally, President Barroso underlines that, although most employment competencies lie with the Member States, there is still an important role for the Commission to play.

Trio Presidency Operational Programme

The three upcoming Presidencies of the European Union (Spain, Belgium and Hungary) released their joint operational programme. In terms of employment measures, the document identifies promoting employment (creating more and better jobs) as the first priority, followed by fighting unemployment, with particular attention to groups having a hard time entering or staying in the labour market. The third priority is promoting social inclusion, preventing and avoiding poverty and social exclusion. The Presidencies place a special emphasis on tackling disparities in employment and social inequalities, striving to achieve a positive interplay between the OMC, the EES and the fight against poverty. In terms of the

future of the EES, the document defines a set of priorities, such as developing targets for measuring the Employment Guidelines, promoting green jobs, addressing the situation of the working poor, fight labour market segregation, tackle undeclared work.

EAPN Activities

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

Round Table on Poverty and Social Exclusion

In the framework of this event, organized by the Swedish Presidency in Stockholm on October 15th-16th, the Employment Working Group was represented by Policy Officer Amana Ferro, on behalf of the EAPN Secretariat. She attended a workshop dedicated to Inclusive Labour Markets, where the role of social economy and particularly WISEs was underlined, not failing to stress the importance of job quality and security, which should be at the heart of any job-creation exercise. She also attended a study visit organized to the Basta social enterprise, a venture set up and run by and for recovering drug-addicts. More information about Basta can be found [here](#).

Joint Social Conference

EAPN, together with 16 other social NGOs and trade unions, at Brussels and EU level, organized a joint conference on September 14th and 15th, in Brussels. The meeting focused on two aspects, for which separate parallel workshops were set up: social dumping and decent employment. The event was 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 was in charge of preparing the Issues Paper for the decent employment workshop. EAPN was represented by Director Fintan Farrell and Policy Officer Amana Ferro from the Secretariat, as well as Philip O'Connor (EAPN Ireland, Chair of the Employment Working Group), Bernart Baltza (EAPN Spain, Employment Working Group), Elke Vandermeerschen (EAPN Belgium, Employment Working Group) and Vito Telesca (EAPN Italy, Social Inclusion Working Group).

24-25/06/2009 - 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

The project has reached its final stage. Partners are currently preparing policy recommendations for the European Union, concerning how WISEs can be supported and made more visible in European policy-making, with direct impact at national level. The results of the project will be presented in Genoa, Italy, on November 12th (the programme of the meeting can be found [here](#), in Italian only) and also disseminated in the framework organised in Brussels to this effect on November the 24th (details to follow). The cross-cutting reports, prepared by the participating countries, as well as more information on the project and related documents can be found on the [project website](#).

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 Communication

The European Commission put out, on July 3rd, 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. EAPN responded to the Communication, 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](#).

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](#)

Employment Summit

The outcome of the Employment Summit (previously called a Troika), which took place on May 7th, 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

2/ Country Recommendations
(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

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

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**

EAPN 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](#).

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 9th, 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 28th. 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 18th, 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)

- 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:

- **Disseminate the EAPN Social Inclusion & Structural Funds Survey to their national government and managing authorities to urge them**

to deliver more social inclusion and ensure a better involvement of the social inclusion NGOs in the Structural Funds.

- 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.
- 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.
- 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
- 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

- **19th October 2009**

The European Commission launched a [public consultation “Have your say on EU financial rules”](#). It will last till the 19th December 2009.

The European Commission invites all the stakeholders to give their views on the financial rules for the programmes funded by the budget of the EU and especially how they impact their day-to-day business and to suggest ways of improvement. It will help the Commission in its second review of the Financial Regulation and its Implementation Rules.

2 topics are addressed:

- The award of grants: the question of more flexibility in the co-financing rules depending on the type of actions is posed.
- The Commission’s handling of financial rules: the alternative of pre-financing payments and guarantees is explored.

The Commission will present its proposals in mid-2010

- **5-8th October 2009, Open Days 2009**

Since 2003, the Open Days are the annual landmark event for Europe’s regions and cities. They provide an open forum of debate and networking opportunities for stakeholders from local and regional authorities, international organisations, business, civil society organisations and the media. 3 workshops were particularly interesting :

- How to use ESF for workers in time of crisis : the objective of the workshop was to explore Member States’ responses to the economic crisis in using ESF financial support and the effectiveness of these responses in fighting rising unemployment levels. There was a presentation of the European Employment Observatory which shows that all the measures undertaken by EU Member States were concentrated on

- maintaining jobs without almost no position activation measures to integrate the furthest from the labour market.
- Social inclusion as an instrument for restoring growth and strengthening cohesion: The aim was to look at the role of social inclusion as an instrument of economic growth and territorial cohesion, placing social policy at the heart of economic policy. The needs of specific targeted groups were discussed such as the migrants, elderly young people.
- Roma inclusion: Experiences from Cohesion Policy Programmes: the aim was to exchange experiences on working with and for Roma in the field of ESF. There were 4 examples coming from Slovakia, Hungary, Italy and Spain.

▪ 28th September 2009

The European Union (EU) Platform for Roma Inclusion, an open and flexible mechanism of governance organised jointly by the European Commission and the EU Presidency at the request of the Council, held its second meeting on the 28th of September 2009 in Brussels.

The Platform is a recent initiative, designed as a process driven by participants rather than a formal body. It has been established as a mechanism through which EU institutions, national governments, multilateral organisations, NGOs and experts share experiences and good practice in order to increase the coherence of existing policy initiatives and improve coordination between institutions.

The meeting focused on the issue of how to improve access by the Roma to quality education, considered as the fundamental precondition for the social inclusion of the Roma. An important theme of the meeting was the need for an integrated approach to education.

What's next?

- The European Commission will publish a report representing a follow-up of its analysis of Community instruments and policies for Roma inclusion in early 2010 (see [IP/08/1072](#)). [This report will focus on the progress achieved since mid-2008.](#)
- The future Spanish EU Presidency and the European Commission will organise the second European Roma Summit on 8 April 2010 in Córdoba to assume the different strands of action. The first Roma Summit took place in Brussels on 16 September 2008 – see [IP/08/1326](#) and [MEMO/08/559](#).

▪ 23th September 2009

With the approach of a new cycle of governance in the European Union, the Committee of the Regions proposed on the 23th September a political project to "build Europe in partnership" through its White Paper on Multilevel governance. The committee is launching a public consultation to sound out authorities, associations and stakeholders on how best to promote multilevel governance in Europe. The public consultation will last till the 30th of November. More information can be found [here](#).

- 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 6th interim Report on economic and social cohesion was published on June 25th 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 22th 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 24th 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

Upcoming activities:

On February 19th and 20th 2010, the EAPN Structural Funds Working Group will meet in Ireland. This meeting will be focus on the follow up of 2010 activities and preparing input on the legacy.

Past activities

- **15th of October 2009**
In the context of the upcoming debate on the future of the Cohesion Policy and at almost mid-term of the current programming period of Structural Funds, EAPN stresses the crucial need to strengthen the link between Social Inclusion and Structural Funds, which is currently clearly insufficient. EAPN develops its views on how to make sure that the Cohesion Policy can be used as a driven force for an inclusive society in the two key following documents:
 - [EAPN Survey on Structural Funds & Social Inclusion](#) : EAPN conducted with its members a detailed study to assess the contribution of the current programming period of Structural funds to social inclusion and the role left by national managing authorities to social NGOs. The study also delivers key political messages for the post 2013.
 - [EAPN Public Response to the Barca Report](#) : EAPN warmly welcomes the Barca Report as a major step forward for making the Cohesion Policy a powerful means to fight poverty and social exclusion, thanks to the newly promoted social inclusion objective and the place-based approach mobilising all local actors
More information can be found [here](#)

- **24th of September 2009**
EAPN participated in the Stakeholder Learning Dialogue Event. This meeting organized in the framework of the European Commission Study on the Ex Post Evaluation of the 2000-2006 ESF Support to the OMC in Social Protection and Social Inclusion. Two focus groups were in charge of working on the following items:
 - The futures challenges to be faced by the ESF in the context of the Social OMC, and the key objectives and goals
 - An “Implementation Strategy” Task which explored the issue of the target groups and the kinds of actions and initiatives
 - A set of agreed answers to the questions previously discussed.

The most striking points raised during the meeting were the following:

- The low level of social inclusion earmarking in the ESF
- The necessity to enlarge the scope of target groups to be addressed by the ESF
- A better integration of the interventions around the needs of the individuals with a focus on quantitative and qualitative targets
- The need to involve from the beginning NGOs so as to better implement the NAPs
- The improvement of the partnership principle towards the NGO sector as regards the transnational dimension.

The key outcome will be the production of a strategic paper aiming at linking the evaluation findings to explore future scenarios for ESF and the social OMC.

- **8th of September 2009**
EAPN, the European Federation of National Organisations working with the Homeless (FEANTSA) and the European Committee for Social Housing (CECODHAS) sent a common letter to the attention of the Swedish Presidency and to the The Rapporteur at the European Parliament, Lambert Van Nistelrooij to support the European Commission proposal to amend ERDF regulation as regards eligibility of housing interventions for marginalised communities as a major step forward for improving their housing conditions. Nonetheless, they pointed out three demands :
 - Target really the most marginalised and deprived communities such as Roma, Homeless people;
 - Strengthen the social infrastructures especially those of the non-for-profit sector to ensure long-term solutions;
 - Enlarge the scope of the measure to EU 27 Members States and not only to the EU 12 new Member States.

More information can be found be [here](#)

- On May 30th 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 6th 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 8th 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.

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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EAPN group in charge:	Social Inclusion Working Group	

It is up to you! What you can do

- **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

- **7th September 2009, the 51 European Committee for Standardization Workshop had a meeting whose aim was to achieve an agreement on a Common Quality Framework Draft for SSGI. During the implementation of the PROMETEUS project, the Common Quality Framework will be tested to check the accuracy and feasibility of this CQF Draft. Depending on the results of the implementation phase, a final agreement on the CQF could be reached on October 2010.**
- **On the 8th 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 3rd 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

- 20th of October

The Commission has published a [Communication "Solidarity in Health: Reducing health inequalities in the EU"](#). The European Commission doesn't propose any legislation but identifies action for supporting Member States to tackle health inequalities by improving knowledge on health inequalities, better monitoring and data collection, more assessment of how EU policies can tackle health inequalities and work with countries, regions and stakeholders.

This communication is a welcome step for social inclusion NGOs because:
1) The socio-economic factors such as living conditions, education, occupation and income are identified as worsening health inequalities. So, the Commission proposes a serie of action targeted for meeting the needs of vulnerable groups (people in poverty, disadvantagesd migrant and ethnic groups, people with disabilities, elderly people or children living in poverty.

- Awareness raising initiatives and actions to improve access and appropriateness of health services, health promotion and preventive care for migrants and ethnic minorities and other vulnerable groups through the identification and exchange of good practice supported by the health and other programmes
- Ensure that the reduction of health inequalities is fully addressed in future initiatives on health ageing

- A report on the use of Community instruments and policies for Roma inclusion including a section on health inequalities will be prepared for the 2010 Roma Summit
- Examine how the Fundamental Rights Agency could collect information on the extent to which vulnerable groups may suffer from health inequalities in the EU, particularly in terms of access to adequate health care, social and housing assistance
- Carry out activities on health inequalities as part of the European Year for combating Poverty and Social Exclusion 2010.

2) A better coordination between the Cohesion Policy and health issues

- Achieve a better alignment of the strategic documents under EU Cohesion Policy with the priorities identified in the social OMC;
- The role of the cohesion policy : better supporting Member States to make use of EU Cohesion Policy and Structural Funds to support activities to address factors contributing to health inequalities

Key concerns:

- If the link with the economic crisis is mentioned at the beginning the Commission doesn't make the link with the trend of liberalization of some types of health services and the impacts on vulnerable groups of people (accessibility, affordability...)
- The stakeholders are mentioned but they are not targeted as key actors to be supported even if they have a big role as interface with the health sector.
 - 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 3rd 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

The launching of the internal procedure leading to the establishment of an EP inter-group on SGIs and SSGIs. With the Lisbon Treaty (art. 16 TEC), 'The European Parliament and the Council, acting by means of regulations in accordance with the ordinary legislative procedure, shall establish these principles and set these conditions without prejudice to the competence of Member States, in compliance with the Treaties, to provide, to commission and to fund such services'

The protocol n°26 precises the notion of common values recognized to SGI by defining common principles and a community framework of governance of public services based on the subsidiarity principle.

The access to public services for citizens is set as a fundamental Right of the EU (art.36 of the Charter of Fundamental Rights), that implies that it has the same legal value as the treaty itself.

So, thanks to the Lisbon treaty, this democratic step forward is translated by a new legislative competence of the European Parliament in codecision with the Council.

Key milestones:

- **Voting of the political groups at mi-November 2009**
- **Final decision of the Conference of the Presidents on the 10th December 2009.**
-
- 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 15th 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 9th 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

- **8th October 2009**

Ludo Horemans participated in the EPEE EU Conference on fuel poverty organised by EPEE (European Fuel Poverty and Efficiency) Consortium funded by the Energy Intelligent Europe Programme (<http://www.epee2009.eu/index.php?action=programme>). Our President took part in the last roundtable on "Networks and Financing action across Europe". In the context of the implementation of the recent third Energy Package (including the setting up of national action plans on fuel poverty), Ludo Horemans highlighted the importance to tackle the growing problem of fuel poverty by an integrated approach embracing the issues of an adequate minimum income, the high level of energy prices and the promotion of energy efficiency. He also showed that EAPN is very committed at the EU and national levels to contribute to the eradication of this problem so as to improve the living conditions of people experiencing poverty. He finished by making key recommendations to strengthen the rights of vulnerable consumers.

Financial Inclusion

- **31th August 2009**

EAPN together with RFA (Réseau de Financement Alternatif) and ECDN (European Consumer Debt Network) responded to the European Consultation on Responsible borrowing and lending in the EU. This joint response stresses the crucial need to ensure more responsible credit and other adequate financial services for people experiencing poverty, particularly in the context of the current economic crisis.

It focuses on the regulation of credit products - so as to eliminate all unethical products -, access to credit, improvement of creditworthiness assessment obligations and incentives to develop community banks.

More information can be found [here](#).

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](#)¹ in 2006, which aims at “eliminating obstacles to trade in services, thus allowing the development of cross-border operations”.

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

¹ See EAPN explainer on the Service Directive

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:

Social Services – [DG Employment](#), Unit E/4.

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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 7th 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.