

EAPN Policy Briefing # 26

June 2009

Foreword

Dear members,

EAPN continues to be concerned about the impact of the worsening economic crisis and lobbying around the EU recovery plans. EAPN members at national level are increasingly engaged with the development of alternative proposals. Whilst welcoming the SPC detailed assessment of the social impact, EAPN members are highlighting the increasingly disturbing impact on people on poverty through not only loss of jobs, but increasing indebtedness, cuts or reduced access to services, housing exclusion etc, despite the recovery plans. The 8th People Experiencing Poverty Meeting on the 15 and 16th May, emphasized these issues to EU decision-makers, but also that the crisis is not new for most people in poverty – suffering a lack of rights to a decent income, a house, job, education and health. The crisis brings in new poor to compete for diminishing resources. EAPN will be launching its new website on adequate minimum income to highlight this key concern in the run-up to the Parliament Elections.

Another big concern has been the Employment Summit held on May 7th. Despite the active involvement of EAPN and Social NGOs in the Social Platform in the 3 preparatory workshops in Stockholm, Madrid and Prague, the Summit focused on a narrow Employment agenda with its 10 point plan, primarily intent on maintaining employment. Whilst this is crucial, little notice is paid to the broader social dimension: the vital role of social protection systems or investing in social services, ensuring an adequate minimum income and an integrated Active Inclusion approach. EAPN's press release highlighted our disappointment.

EAPN will now be working to press the ministers prior to the June Summit, on the need to take more account of the social impact of the crisis, through Active Inclusion, strengthened adequate income and social protection, as well as preparing our input into the post 2010 debate following our joint seminar on the 29th/30th May.

On a positive note, the Parliament finally approved the Jean Lambert, Active Inclusion Report, defeating the EPP Alternative version. This report picks up many of EAPN's messages and gives solid backing to targets for adequate minimum income at above the poverty threshold, progress on a Directive on Services of General Interest, and implementation of a broad Anti-Discrimination Directive...

The Secretariat team

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 YEAR OF COMBATING POVERTY AND SOCIAL EXCLUSION

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It is up to you! What you can do

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

- Dialogue with the National Implementing Body to develop the national programmes for 2010 and make sure that consultation mechanisms are in place for dialogue with NGOs throughout the Year.
- Contact other NGOs to see what are their plans, generate knowledge about the Year and discuss possible common actions
- Start planning political outcomes - it is crucial to start defining in advance what your expectations are for the year (such as new law, programme, political commitment, new body?).
- Start planning participation of people experiencing poverty, which should be a key feature of the Year.
- Try to think of possible projects and contact project promoters: even if projects will be selected through open calls, chances are always higher if planned in advance.
- It is also possible to start contacting larger institutions (such as media, museums, theatres, schools) to plan other thematic activities, which might be financed from other sources than the more “official” framework for the Year.
- And finally, do send information on the activities you are preparing for the Year to the EAPN Secretariat, so that other networks can get inspiration from what you are doing

For information – latest developments

The European Commission has presented their preliminary plans for the year. The main efforts so far are around the communication strategy, while hardly anything is being said about the political outcomes foreseen or expected from the year.

Communication strategy

The European Commission is just in the process of contracting the agency that will be in charge of the official communication around the Year. The logo is already developed though, and can be found here:

<http://2010againstopoverty.europa.eu>

The main activities planned by the European Commission are:

▪ **Media event 29 October 2009**

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

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

- **Journalist competition**

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

- **Art exhibition**

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

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

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

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

The week will take place around the International Day against Poverty, 17 October, but there are no concrete plans yet.

- **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.

National Implementing Bodies (NIBs) and the National programmes

According to the European Commission they still expect to receive the national programmes on 15 May, but apparently some countries have already indicated that they will be late by a month at least. After receiving the programmes, the European Commission will have to approve them before any grant making or calls can be organised at national level.

The General Time table seems to be as follows:

May 2009: Submission of National Programmes

July 2009: Approval by the Commission of National Programmes

September 2009: Calls for proposals for activities in the National Programmes. The selected proposals could be agreed by the National Implementing bodies about 2/3 months after the call.

December 2009: Signing of contracts between the Commission and the National Implementing Bodies (please note that it is not expected that the Commission will be approving the individual projects selected for support under the National Programmes)

EAPN Activities

- On 29 May 2009, EAPN is organizing a seminar bringing together key EAPN working groups, focusing on political legacy for 2010. The June 2009 General Assembly will also have a strong focus on preparation.
- A **Consultative Committee** has been set up including representatives of all the National Implementing Bodies. This committee met on 17 April for an information exchange. Two NGO representatives (one of them being EAPN) were invited to participate in part of this meeting.
- EAPN and other European NGOs met with the **European Commission 2010 Taskforce** on 4 May to get an update and discuss key concerns.

- An **EAPN 2010 Update** was sent on 12.05.2009. This will be a regular feature, to make sure that all networks feel informed about the developments in view of 2010.
- The **steering group of European NGOs** working on 2010 (coordinated by EAPN) has met on 20 April and 18 May 2009.. The groups is developing shared political messages and demands for the Year, as well as mobilising support for the EU focus weeks.
- A **2010 Web site** is being planned, and is scheduled to be up and running in the beginning of October
- Plans for the **European Focus weeks** are going ahead: The spring focus week will aim to create visibility about the situation at national levels throughout Europe, by promoting broadcast initiatives across Europe on Poverty. The autumn focus week will aim to build political pressure for the outcomes of the Year, and will include organising a human chain around the EU institutions.

National networks

National Networks are already getting active around the Year, 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.

At the last EXCO it was 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.

There was also an idea to possibly produce *written portraits* of PEP. But this idea need some more concrete planning before we go ahead and try to make it happen..

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

- Marie-Anne Paraskevas , Inclusion Unit (EMPL E2), Policy Officer, responsible for relations with NGOs, +32 2 29 58480, Marie-Anne.Paraskevas@ec.europa.eu
- Anne Degrand-Guillaud, Coordinator of the 2010 Task Force, Inclusion Unit (EMPL E2), Anne.Degrand@ec.europa.eu, +(32) 2 296031

In the Member States

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

Background resources and documents

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

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

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

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

EAPN key positions and past action

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

2. OMC ON SOCIAL PROTECTION AND SOCIAL INCLUSION

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

- Participate actively in the joint seminar on 29th May: Beyond 2010 and the SIWG meeting on the 30th May and the follow up on political legacy for 2010 and the shape of post 2010 strategy to fight poverty and social exclusion at national and EU level.
- Provide input to the draft EAPN Position paper on post 2010 – particularly in the areas related to poverty strategies, and the OMC.
- Give written input to your SPC member to in their response to the questionnaire on Homelessness and Housing Exclusion before the 15th June, send a copy to the EAPN secretariat. (Sian).
- Give feedback to EAPN and your SPC member and people responsible for the NAP on the social impact of the economic crisis.
- Check the calendar of Peer Reviews to see if you can get involved.

For information – latest policy developments

Social Impact of the Economic Crisis.

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 report draws on the SPC questionnaires and available data and highlights how unemployment is affecting primarily the young, elderly, migrants and ethnic minorities, the low skilled and those on precarious contracts, but underlines the role of welfare systems as automatic stabilisers. It also emphasizes impact on household debt, homelessness with increasing repossessions and pressures on financing social protection systems. 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.

15 – 16 May, 8th Meeting of People Experiencing Poverty. The 8th Meeting was hosted by the Czech Presidency and the Commission, organized by EAPN, and was held in the Egmont Palais. 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. Key decision-makers including **Commissioner Spidla**, Director Jerome Vignon, Officials from the Spanish, Swedish, Belgium as well as the Czech Presidency. At the end of the event, the national delegations reflected on the key outcomes from the workshops, and shared with the participants their "Wishes for 2010", The conclusions from the event have been forwarded to President Barroso and the Council , with a commitment to review progress during 2010.

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

The final title will be: Social inclusion in times of recession - New challenges for the Active inclusion strategy.On the **14th May**, a 2nd meeting was held between the Swedish Presidency, the Commission and social NGO's. EAPN Sweden is part of the delegation with the Swedish Presidency. The focus of the event will be on Active inclusion in times of recession – new challenges, with a strong focus on reinforcing the social OMC and building for 2010. The revised programme, makes governance and participation and the role of the OMC cross-cutting issues, as well as putting more emphasis on linking the Conclusions to the Legacy for 2010. However, there will be no linked informal Social Ministers meeting, like under the French Presidency, which weakens its potential for political impact.

Social OMC – Thematic Focus: Homelessness and Housing Exclusion

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

May 2009: SPC members have been preparing their response to the SPC questionnaire on homelessness and housing exclusion.. Member States have to respond by the 15th June, prior to the SPC meeting on the 2nd July. The responses will also be analysed by the Networks of Independent Experts and a report published, which will provide the basis for a conference at the end of the year. The questionnaire covers the overall policy framework, access to housing for homeless people and quality of housing, use of integrated active inclusion approach, governance, evidence/monitoring and evaluation.

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

Minimum Income Report

The 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. The synthesis draft report aims to be ready for the 12th June. It should be published in the Autumn.

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

Report on Governance and Participation in the OMC

The study 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:

- 27 country reports, giving an overview of the state of affairs on stakeholders' involvement in the different EU Member States
- A final report presenting the main conclusions and recommendations
- Leaflets for wider dissemination
- A website to disseminate the study results and to provide information more generally on good governance and stakeholders' involvement in the policy process.

Social Impact Assessment

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.

Material Deprivation: 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:

- o Endorsement of the Active Inclusion Recommendation
- o 3 Innovations – involvement of People experiencing poverty, the involvement of the media and the political momentum with the Informal Ministers meeting.
- o 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 main focus of the SIWG during this period has been on providing information on the economic crisis, helping to prepare the Joint Seminar on Beyond 2010 on the 29th May, inputting information to an adequacy explainer on minimum income, and responding to the SPC questionnaire on homelessness and housing exclusion.
- The Social Inclusion Working Group will meet on the 30th May, following the Joint Seminar and focus on: follow up to the seminar related to EAPN's position on post 2010, input to the thematic year: homelessness and housing exclusion, debate the draft adequacy explainer on minimum income and exchange on promoting participation in EAPN and EAPN good practice publication and checklist.

Lobbying and Advocacy on the Social OMC

In this period:

- EAPN has been actively working with members to organize the EAPN Seminar: Beyond 2010 on the 29th May 2009 and developing the draft EAPN position paper on post 2010.
- EAPN has been developing the first draft of the adequacy explainer on minimum income, and engaging with the Commission on the minimum income report.
- Coordinating input on the programme and process of the Swedish Round Table.
- Contributing to the organization of the People Experiencing Poverty 8th Meeting.
- Contributing through the Social Platform to the Employment workshops and Summit (See employment section).
- Lobbying on the EP Active Inclusion Report (see Active Inclusion).
- Set up a joint meeting with other Social NGO's through the social Platform to develop a joint position on the Reinforcing the OMC. This will be finalised by the end of May.

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.

- 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 policy developments

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.

EAPN past activities

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

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

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

Policy follow up and lobbying of the Active Inclusion process

Implementation of the Active Inclusion Recommendation

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

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

The Indicator Sub-group of the SPC has already included in its work programme for 2009 the work on Active Inclusion indicators, covering the three pillars (minimum income, link to the labour market, access to quality services). These indicators will be discussed at the following meetings: 10 Feb: 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.

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

Minimum Income Campaign

- **Signatures: the process of putting together lists of targets and starting collecting signatures form 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

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 (23/02/2007)*.

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:

- **EAPN members (particularly EXCO) should be trying to find out from their Lisbon National Coordinators, what process will be followed on Lisbon National Reform Programmes this year and to highlight their input on the social impact of the crisis.**
- **Participate in the Joint Seminar on 2010 and beyond – the legacy we want. Getting progress on an EU without poverty and social exclusion on the 29th May 2009 and the follow up work on the EAPN position paper, pushing for a positive legacy at EU and national level.**

For information – latest policy developments

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

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

- **The main focus of the Lisbon Strategy has been on delivering the promised Employment Summit (see employment section), despite the calls for a broader focus on social as well as economic impact. The next steps will be the publication of a new Communication on Employment on June 3rd which will be the main focus on the June European Council on the 18/19 June.**
- o 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 workshops 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.
- o 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*”.
- o 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:
 - o A report on the implementation and future priorities of the [Community Lisbon programme](#)
 - o 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

- The SPC and EMCO had their first discussions on post 2010 in April and May. The SPC will finalise its opinion on the July 2nd SPC Meeting. President Barroso will deliver a speech in the new European Parliament on the 17th July, setting out his broad vision on post 2010. It is understood that the Commission will promote a stakeholder debate (by internet) during the Autumn, with the Commission’s Communication appearing at the end of the year.

- The latest information/feedback appears to highlight that the Ministers nor the Commission are not in the mood for very radical changes. The main focus is likely to be some light revisions to the Integrated Guidelines. The Employment Troika and preparatory meetings in April will be used to build consensus also on this area.
- The EMCO and SPC started first discussions on post 2010 in February through a joint Task Force. The Informal Council on the 26/27 March in Prague focussed on draft proposals. The theme of post 2010 will be the key thematic focus for both EMCO and SPC in April and June meetings. The SPC will finalise its opinion for the July 2 SPC meeting.
- The Commission has began its discussions on the post 2010 strategy. The Secretariat General will take the lead on these proposals. A meeting was held with the [Lisbon National Coordinators in Paris](#) on the 5 December. The proposals of Tanugi-Cohen 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

European Council and Economic Recovery

- **EAPN continues to lobby for a broader social response to the Economic Recovery Plans and is collecting information from the national networks and other members on the response to the crisis. This will be finalised before the summer.**
- **EAPN will be sending a letter to the June European Council, highlighting these concerns and linked to our demands for post 2010.**
- In March, following discussions with the SIWG and other working groups, EAPN lobbied the EPSCO and the Spring Council with 2 letters and press releases. The main focus was on the need to develop coherent short-term measures to limit the social impact of the crisis whilst developing a more comprehensive long-term strategy which built on the lessons of the failures of the current growth and jobs strategy and the economic model that underpins it. The specific demands were to support public investment in social protection, adequate minimum income and social services as vital tools to mitigate the social impact and invest in people. A key concern was the impact on NGO's – their services and advocacy actions. In the press release whilst welcoming the confirmation of the need to support social protection systems EAPN highlighted our dissatisfaction with the lack of an integrated, cross-cutting approach to social impact or the unwillingness to use the crisis to stimulate a broader debate on the causes and weaknesses of the current strategy.
[See Press Release/Letter](#) to Spring Council
See [Press Release and Letter to the EPSCO Council](#)
- EAPN is preparing a response to the new Communication together with a Reality Check highlighting current developments at member state level based on the member's fiches.

Post 2010

- EAPN is holding a 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. This EAPN position paper will be finalised in June and used to lobby the President of the Commission and the prime ministers in the Autumn and lead up to the Spring Council 2010.
- EAPN is in the steering group of the Spring Alliance, as well as chair of the new economic model working group, which is developing the manifesto for a social and sustainable EU. EAPN will be a key actor in the seminar to be held on the 17th June, which will aim to get feedback from key stakeholders on the draft manifesto. The manifesto will be launched in Brussels on the 28th September.
- 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:

- **Send information to EAPN on studies on minimum income and methods of calculating adequacy**
- **Participate actively in the joint seminar on 29th May: Beyond 2010 and the EWG meeting on the 30th May and the follow up on political legacy for 2010 and the shape of post 2010 strategy to fight poverty and social exclusion.**
- **Provide input to the draft EAPN Position paper on post 2010 – particularly in the areas related to employment.**

Latest policy developments

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.

As next steps, the European Commission is currently preparing a Communication on these matters for the June Summit, in which EU leaders should take political decisions on the way forward. The draft is quite advanced and it will be released on June 3rd. EAPN will be meeting with EC representatives on May 25th to discuss our concerns on the matter.

Social Economy

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](#).

EAPN Activities

Conferences

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

National peer-reviews for this project (bringing together participating countries two by two) are taking place during April and May, to ensure exchange of good practices, as well as to foster debate on the future of social economy in these countries, with a specific focus on WISEs. Elke Vandermeersch from the EWG has attended the Belgian peer review (with Finland) and Amana Ferro from the EAPN Secretariat has attended the Romania-Poland peer review in May. The Malta-Spain peer review is scheduled for the beginning of June, while a meeting with all project partners will take place in Rome on June 23rd.

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

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**

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 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

This section has not been updated since April, due to Elodie's departure. A full update will be included in the July Briefing.

It is up to you! What you can do.

Working group members are encouraged to:

- **Support dissemination of the structural funds manual and try to seek technical assistance funding for translation and impression.**
- **Contribute to the Survey on the Implementation of the Funds. Based on a questionnaire to be sent out in April, it will serve as a basis for EAPN's key pieces of work in 2009: June shadow report on implementation and November contribution on the future of cohesion policy.**
- Get in touch with their managing authorities to see if any change is foreseen to the Operational Programmes as a result of the crisis. **Send EAPN any relevant information on how the funds are changed as a result of the crisis. Ensure that there is a real effort put on simplification and that our key concerns are taken into account.**
- Define their national network's priorities on structural funds for 2009, building on the capacity-building seminar outcomes ([see the notes](#)).
- Send the [social indicators' document](#) to their managing authority and monitoring committees if this was not done yet
- get involved in activities around evaluation and closing of the programming period, to promote a social inclusion perspective
- join the Communities of Practice set up on the different aspects of EQUAL, and call on their managing authorities to do so as well: www.esflive.eu
- 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

- Following the March Czech Presidency conference on the issue, Commissioner Hübner will outline how the future policy might look during an informal meeting of European ministers in charge of regional development, to be held in Mariánské Lázně, Czech Republic on 23-24 April 2009. More information on the [Commission's website](#).
- The Italian economist Fabrizio Barca has been invited by the European Commission to conduct an independent analysis of European cohesion policy, together with academics and experts from the field. The *Barca report* will be published on 27 April 2009.

Past developments

- Debate on how to adapt cohesion policy as a result of the crisis is currently going on: the European Parliament unanimously adopted the European Commission's proposal to change costs eligible to the [ESF regulation](#) (changing eligible costs) and supported as well a refocusing on energy efficiency in housing in the purpose of social cohesion. More information on the changes proposed can be found in [EAPN's presentation](#) on the issue as well as [here](#).
- In line with EAPN's recommendations, the 2009 Joint Report on Social Inclusion and Social Protection, published early March, calls for a strengthening of the interaction between the European Social Fund and the Open Method of Coordination on Social Protection and Social Inclusion. Its supporting document also contains information on how the funds have been implemented in the purpose of inclusion in the Member States. More detail can be found on the Commission's [webpage](#).
- In January 2009, Commissioner Hubner presented the Commission's priorities for cohesion policy in 2009: moving forward on debate around the future of the funds (2014-2020), adapting the funds and boosting their use as a result of the economic crisis, setting up of an expert group on simplification which should publish its results in May.
- In January 2009, the Czech Republic has taken on the rotating presidency of the EU for 6 months (to be followed by Sweden): among the priorities will be simplification of the funds, debate on the future of cohesion policy (major conference organised on 26-27 March in Prague).
- The European Commission is currently undertaking a study on how to improve the links between structural funds and the Social OMC. EAPN has contacted the European Commission ESF unit to contribute. In addition, the topic was identified as a priority within the 2009 Joint Report on Social Protection and Social Inclusion.

EAPN Activities

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

Upcoming activities:

- On 29 May, the EAPN structural funds, employment and social inclusion working groups will meet for a seminar on “2010: the legacy we want”, that will look at national and EU level strategies to promote new political outcomes on the occasion of the EU Year 2010 for Combating Poverty and Social Exclusion. It will be followed by the EAPN working group meeting on Saturday 30th May.
- The New EAPN Manual on structural funds will be disseminated and sent to key EU level contacts by mid April 2009. [English version](#), [French version](#)

Past activities

- 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. Please click [here](#) to see minutes.
- 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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It is up to you! What you can do

- **Services Directive – EAPN members are asked to give feedback to any problems that are arising with the implementation of the Services Directive on the ground, including any difficulties with EU Competition or State Aid rules, particularly in relation to social services, as EAPN wishes to assess to the impact**
- **Contribute to the May 29th Seminar and the specific proposals in the EAPN position paper on post 2010.**

For information - Latest policy developments

Social Services

- **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

- **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

- 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 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 6th February 2009, the European Commission launched a [consultation on financial inclusion](#), "Financial inclusion: Ensuring access to a basic bank account". The aim is to clarify responsibilities and competences between public authorities and the private sector, and more broadly between the EU and Member States, and review some possible instruments to better fight against financial exclusion. The consultation will last until 6 April 2009 and could potentially lead to legislation on the issue. Yet it is regrettable that it focuses on the right to a basic bank account, at the expense of a broader approach covering as well access to credit, financial services, data protection for example. EAPN will be contributing.

EAPN activities

Services (general)

- Services of General Interest will be a strong focus of the 8th meeting of People Experiencing Poverty, to take place in May 2009. Workshops will focus in particular on housing, financial inclusion and basic services.

- The EAPN Social Inclusion working group had a specific session on services on 28th February 2009. Key issues of the agenda were the identification of national networks current concerns on SGIs and EAPN added value and priorities on SGIs. Click to see the [minutes](#). A background information briefing will be finalised in April.
- EAPN spoke in the CELSIG conference on SGI in the Committee of the Regions on the 13th November 2008.
- The last Services Group meeting was held on 10th October 2008 in Brussels. The Group evaluated its work and agreed to finalise the work on the Energy Package, Social Services of General Interest and Services of General Interest, before integration into the SIWG. The major focus will be to mainstream the concerns on SGI and to exchange experiences/solutions on the impact of liberalisation on key services.

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 off conference of the CEN workshop on Common Quality Framework for Social Services, part of the [EQUASS project](#)

Energy

- As a follow-up to our campaign on energy poverty, in February and March, EAPN monitored and inputted into discussion between the Parliament and the Council on the Electricity Directive.
- In January 2009, EAPN met with BEUC, the European Consumers' Bureau, and CECODHAS (social housing) to discuss possible common action on energy poverty.
- Since 2008, EAPN has been working closely together with the rapporteur responsible for the Parliamentary Report on the Electricity Directive (Eluned Morgan), particularly in relation to Energy Poverty
- With regard to the [Proposal for a European Parliament Declaration on Energy Poverty](#), EAPN sent out a joint lobbying letter on together with EPSU, CECODHAS, AGE and FEANTSA. A joint lobbying action was carried out, in the plenary session on the 9th October 2009.
- In July 2008, EAPN produced a special edition on [Energy Poverty](#).
- EAPN Ireland has produced a useful report on Energy Poverty – contact info@eapn.ie for more information.

Financial inclusion

- **On 6th April 2009, EAPN sent a [contribution](#) to the European Commission's consultation on financial inclusion and access to a basic bank account. Stressing that time has come to "restore citizens' confidence in the EU's financial agenda...by putting the internal market at the service of public good", the contribution calls on the European Commission to propose a Directive on Access to a Basic Bank Account. The latter should cover a number of key services and be accompanied by accessible, affordable, quality services. However, tackling financial exclusion implies looking much beyond access to a bank account: urgent action is also needed to ensure fairer credit and lending practices, and tackle over-indebtedness.**

Health

- **In March 2009, EAPN contributed to the [Social Platform's response](#) to the European Commission's consultation on financial inequalities.**

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 Directive¹ 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:

¹ See EAPN explainer on the Service Directive

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

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

Energy poverty

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

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

Responsible for:

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

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

DG Employment:

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

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DG Sanco (Health and Consumer Protection)

Véronique Arnault, Head of Unit B1, Policy analysis and development. Relations with consumer organisations, international relations.

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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.