



# The Social Protection and the Social Inclusion OMC and the role of transnational exchange projects – Project RESTART

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## The Social Protection and the Social Inclusion OMC: Background

The Open Method of Coordination (OMC) in the areas of social inclusion, pensions and healthcare developed in the light of the strategic objective of the Lisbon European Council of March 2000, which included the creation of “greater social cohesion”.

The Council called for EU-level work:

- to make a decisive impact on the eradication of poverty
- on the future adequacy and sustainability of pension systems



## The Social Protection and the Social Inclusion OMC:

### Key elements



- Common Objectives
- Commonly agreed indicators
- National Strategy Reports – NSRs (ex-National Action Plans – NAPs)
- Reporting and Monitoring at EU level - Joint Reports (on Social Protection and Social Inclusion)
- Mutual Learning – PROGRESS 2007-2013 (before - Community Action Programme to combat social exclusion 2002-2006)





## The Social Protection and the Social Inclusion OMC: Overarching and specific objectives

To promote:

(a) **social cohesion**, equality between men & women and equal opportunities for all through adequate, accessible, financially sustainable, adaptable and efficient social protection systems and social inclusion policies

+ in particular: Making a decisive impact on the eradication of poverty and social exclusion

+ Providing adequate and sustainable pensions

+ Ensuring accessible, high-quality and sustainable healthcare and long-term care.

(b) effective and mutual **interaction between** Lisbon objectives of **greater economic growth, more and better jobs and greater social cohesion**, and with EU's Sustainable Development Strategy

(c) **good governance**, transparency and involvement of stakeholders in design, implementation & monitoring of policy





# The Social Protection and the Social Inclusion OMC: Main developments so far

- Launching of the Lisbon strategy (March 2000)
- Launching of the community action programme to combat social exclusion (2002-2006)
- Common objectives agreed at EU level (Nice, December 2000 and revised in Copenhagen in December 2002)
- Common indicators agreed at EU level (Dec. 2001 and June 2006)
- National action plans against poverty and social exclusion:
  - For 15 old MSs: June 2001, July 2003 and July 2005 (implementation reports)
  - For 10 new MSs: December 2003 (JIMs), July 2004
  - BG and RO: December 2003 (JIMs)
- Joint report on social inclusion (2002 and 2004) and Synthesis report of the Joint Memoranda on Social Inclusion (June 2004)
- Report on Social Inclusion 2005 (for 10 new MSs)
- Joint Report on Social Protection and Social Inclusion (2005 and 2006)
- Social Inclusion in Europe 2006 - Implementation and update reports on 2003-2005 National Action Plans on Social Inclusion and update reports on 2004-2006 National Action Plans on Social Inclusion
- New National Reports on Strategies for Social Protection and Social Inclusion 2006-2008: for all MSs and also BG and RO – September 2006
- Revision of Lisbon strategy and revised OMC (March 2006)
- Launching of Progress (2007-2013)
- Joint Report on Social Protection and Social Inclusion 2007



## The Social Protection and the Social Inclusion OMC: Specific elements: The NSRs (ex-NAPs)



A common section containing:

- assessment of social situation, reporting on major trends & challenges in poverty/social exclusion, pensions and health and long-term care
- presentation of the overall strategic approach for modernising social protection & social inclusion policies

Three thematic plans covering social inclusion, pensions and healthcare. These should be forward looking (3 years period) and set out prioritised national objectives translating the common objectives into national policy plans.

Each will serve as a national plan for the specific policy field.





## The Social Protection and the Social Inclusion OMC: Specific elements: Joint SP & SI Report 2007

- summarises main issues and trends
- assesses MSs' progress in reaching common objectives
- reviews “feeding in” to Lisbon process and assesses how progress towards Lisbon goals of employment & growth is impacting on social cohesion (“feeding out”)
- encourages mutual learning
- creates greater political and public awareness
- Some of the 2007 key challenges identified/ messages:
  - Child poverty: breaking the cycle of deprivation; “ensuring access to quality education and training for all, focussing especially on pre-schooling and on **tackling early school leaving is vital**”
  - Need to modernise social protection systems, ensure decent housing and overcome discrimination and increase the integration of people with disabilities, ethnic minorities and immigrants
  - Active inclusion as a powerful means of promoting the social and labour market integration of the most disadvantaged
  - Better linkages are being made by MSs both within the streamlined social protection and social inclusion process and between this process and economic and employment policies at national level
  - Stakeholders, including the people directly affected, increasingly involved in process but quality of involvement can be improved

Link to joint report: [http://ec.europa.eu/employment\\_social/social\\_inclusion/jrep\\_en.htm](http://ec.europa.eu/employment_social/social_inclusion/jrep_en.htm)



# The Social Protection and the Social Inclusion OMC: Early School leaving and the 2007 Joint report



- Early school leaving increases the risk of exclusion from the labour market, job insecurity and low quality employment.
- EU average: 15%. Countries with higher percentages: 30% Spain, 39% Portugal and almost 42% in Malta. Lowest rates in Poland, Czech Republic and Slovenia.
- Examples of both preventive and compensatory measures indicated by MSs:
  - redesigning educational policies with a gender focus, as boys tend to leave school earlier than girls (Ireland);
  - investing in second-chance schools (Germany);
  - action to prevent early school leaving and truancy among impoverished children (Romania);
  - ambitious targets for reducing school failure coupled with a set of preventive measures, such as establishing full-time school (longer school hours) (Portugal);
  - a plan for reinforcement, guidance and support, and pedagogical improvements with particular focus on diversity (Spain);
  - introducing non-formal and informal learning as a preventative measure (Malta);
  - raising the school-leaving age (the Netherlands);
  - grants and logistical support for disadvantaged pupils (Poland, Lithuania, Hungary);
  - extension to upper secondary level of rights to student welfare and guidance (Finland);
  - and cooperation with NGOs in addressing early school leaving (Cyprus).

And examples of best practice in France with the programme for educational success (*Réussite éducative*) targeted at children experiencing hardship and/or living in deprived areas; and in Romania with the *Gata, Dispus si Capabil* project involving the NGO *Asociatia Ovidiu Rom* working in partnership with local government in three neighbourhoods to increase school attendance and performance among Roma children, and to help Roma mothers find jobs.







## The Social Protection and the Social Inclusion OMC:

### Specific elements: Community action programme to combat social exclusion (2002-2006)

- Studies: themes such as access to information technologies, disadvantaged youth, decent housing for immigrants, regional Indicators, contributions from cultural policies, microcredit, child poverty, Roma, measurement of homelessness at EU level, poverty and social exclusion among lone-parent households.
- Transnational exchange projects (currently more than 20 projects running under second TEP)
- Awareness Raising Actions (first call in 2004 and currently 2006 with 19 projects)
- Impact assessment projects: evaluation of the economic and social impact of inclusion policies (nine projects)
- Core-funding of NGOs
- Peer review: eight per year
- Seminars and conferences (example of Active Inclusion conference 15/6/07)
- Network of independent experts
- Presidency events: People experiencing poverty conference (May) and Round Table on Poverty and Social Exclusion (16-17 October)



## The Social Protection and the Social Inclusion OMC:

### Specific elements: Transnational exchange projects



Expectations - Projects should concretely:

- go beyond the current knowledge in the issues analysed;
- produce concrete results such as reports, events, guidelines/ recommendations/ policy papers/ studies;
- ensure the dissemination of the results and findings;
- mobilise relevant stakeholders, including local, regional and national authorities, promoting networking;
- make links to policy-making, in particular concerning the National Strategy Reports process; and
- raise awareness and if possible link with the media.

The EC provides support and assistance at a policy level but also in the dissemination of results and findings; as well as, where appropriate, draw from the latter for Commission documents and briefings.



## The Social Protection and the Social Inclusion OMC:

### PROGRESS: Objectives



1. To improve the knowledge & understanding of the situation in the Member States
2. To support the development of statistical tools & methods & common indicators
3. To support & monitor the implementation of Community law & Community policy objectives
4. To promote networking, synergies, mutual learning, identification & dissemination of good practice & innovative approaches at European level
5. To enhance awareness among stakeholders & general public and promote coordination mechanisms between MSs and civil society
6. To boost the capacity of key networks





## The Social Protection and the Social Inclusion OMC:

### PROGRESS: Sectors

✘ Financial support to the implementation of the objectives of the EU in the fields of employment & social affairs.

✘ From 1 January 2007 to 31 December 2013.

✘ Financial envelope: €743,250,000

Employment	23%
Social protection & inclusion	30%
Working conditions	10%
Antidiscrimination & diversity	23%
Gender equality	12%

## The Social Protection and the Social Inclusion OMC:

### PROGRESS: Types of actions foreseen



- a. Analytical activities (studies, analysis, indicators, surveys, evaluations, guides, education material, impact assessments)
- b. Mutual learning, Awareness and Dissemination (best practices & peer review; conferences & seminars; media campaigns and events; publications)
- c. Support to main actors (support to key EU networks; working groups; training seminars; experts' networks; EU level observatories; exchange of personnel; cooperation with international institutions)





## The Social Protection and the Social Inclusion OMC:

### PROGRESS: social protection and social inclusion sector

- Provide information, analysis, research and statistical development for OMC policy coordination including a survey on long-term and family care, a study on the prevention of child poverty, and improved monitoring of the implementation of EU social inclusion and protection laws
- Research into funded pensions in the new Member States
- Research on the workings of occupational pension schemes and private health insurances
- Support the work of the EU Mutual Information System on Social Protection (MISSOC) which looks at the social and economic impact of social protection systems and reforms
- Support EU expert networks to monitor the level of poverty and social exclusion in the Member States and fund seminars to enable peer review
- Raise awareness, debate and mutual learning on social inclusion and protection including an annual meeting of People Experiencing Poverty as well as an annual Round Table of all the relevant stakeholders
- Support strong civil society involvement, crucial for developing social policies, and the capacity of key EU networks in this field
- Launch feasibility studies to look at new activities such as networking among specialised institutional bodies and the exchange of personnel between national/regional administrations
- Fund transnational exchange projects on policy priorities to support social inclusion and protection





## The Social Protection and the Social Inclusion OMC:

### PROGRESS: Who can participate?

1. Member States
2. Public employment services & their agencies
3. Local & regional authorities
4. Specialised bodies provided for under Community law
5. The social partners
6. NGOs, in particular those organised at European level
7. Higher education institutions & research institutes
8. Experts in evaluation
9. National statistical offices
10. The media

Participation of third countries.



## The Social Protection and the Social Inclusion OMC: PROGRESS: How to participate?

Application for support through:

- a service contract (following call for tenders)
- Eurostat procedures (for cooperation with national Statistical Offices)
- a partial subsidy (following call for proposals – not exceeding 80 % of the total expenditure)
- Some type of actions may be subsidised in response to requests, e.g. from MSs

€ 82,900,000 for 2007

DG EMPL Website for grants and tenders:

[http://ec.europa.eu/employment\\_social/emplweb/tenders/index\\_en.cfm](http://ec.europa.eu/employment_social/emplweb/tenders/index_en.cfm)





## The Social Protection and the Social Inclusion OMC:

### PROGRESS: method of implementation

- Direct management by the Commission
- Commission is assisted by a Committee (with representatives from Member States)
- Approval by the Committee of the general guidelines for implementation and annual plans of work
- Annual Plans of Work implemented through
  - Call for tenders (contracts)
  - Call for proposals (subsidies - max 80% co-financing)





## LINKS

### For more information:

#### Social Inclusion:

[http://ec.europa.eu/employment\\_social/social\\_inclusion/index\\_en.htm](http://ec.europa.eu/employment_social/social_inclusion/index_en.htm)

#### Social Protection:

[http://ec.europa.eu/employment\\_social/social\\_protection/index\\_en.htm](http://ec.europa.eu/employment_social/social_protection/index_en.htm)

#### Peer review:

<http://www.peer-review-social-inclusion.net/>

#### PROGRESS

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

