

Main Features of the Open Method of Coordination

Agreement on common objectives and strands of work at EU level.

Two sorts of objectives can be differentiated, depending on their scope of application:

1) Overarching Objectives

Since the adoption of the new framework for the social protection and social inclusion process (the re-launched Lisbon Strategy) the overarching three objectives of the OMC for social protection and social inclusion are the following:

- To promote social cohesion and equal opportunities for all through adequate, accessible, financially sustainable, adaptable and efficient social protection systems and social inclusion policies;
- To interact closely with the Lisbon objectives for achieving greater economic growth and more and better jobs, as well as with the EU Sustainable Development Strategy;
- To improve governance, transparency and the involvement of stakeholders in the design, implementation and monitoring of policy.

2) Objectives applying to the different fields of operation

- Making a decisive impact on the eradication of poverty and social exclusion
- Ensure the active inclusion of all by promoting participation in the labour market and by fighting poverty and exclusion among the most marginalized groups;
- Combat all forms of discrimination which lead to exclusion;
- Incorporate the fight against poverty and social exclusion into all relevant public policies, including economic and budgetary policies, and the Structural Fund programmes (especially the European Social Fund).
- Providing adequate and sustainable pensions
- Guarantee an adequate retirement income for all and access to pensions which allow people to maintain, to a reasonable degree, their living standard after retirement;
- Ensure the financial sustainability of public and private pension schemes, particularly by supporting a longer working life and active ageing, thus guaranteeing an appropriate and fair balance between contributions and benefits, and maintaining the security of funded and private schemes;
- Ensure that pension schemes are transparent and that people receive the information they need to prepare for retirement.
- Ensuring accessible, high-quality and sustainable health care and long-term care
- Guarantee access for all to adequate health and long-term care, and ensure that the need for care does not lead to poverty and financial dependency;
- Promote quality of care and rational use of resources.

Establishment of common indicators to compare best practices and to measure progress reaching the common objectives.

The broad methodological framework consists of a list of primary and secondary indicators for an overarching portfolio and the three strands (Social Inclusion, Pension, Health and long-term Care). Primary indicators are a reduced set of lead indicators, which cover all essential dimensions of the defined objectives. Secondary indicators aim at supporting these lead indicators by providing a greater insight into the nature of the problem. These indicators are used for the overall National Reports on Strategies for Social Protection and Social Inclusion and the specific National Reports on the different strands (Social Inclusion, Pension, Health and Long Term Care) as well as for the joint report presented by the European Commission and the Council.

Development of an adjustment of the common EU objectives into the national level on the basis of National Reports on Strategies for Social Protection and Social Inclusion.

The national reports for each of the three areas of work should be sent to the Commission on a regular basis - every two years - in the form of a “National Report on Strategies for Social Protection and Social Inclusion”. Subject to an informal agreement, the member states and the Commission have developed a common approach to prepare these national reports. According to the current guidelines, national reports must contain four parts:

Part 1: Common Overview

- Assessment of the social situation
- Presentation of the overall strategic approach

Parts 2 – 4: Three thematic plans

- NAPs for Social Inclusion
- National Strategy Report for Pensions
- National Strategies for Health and Long-Term Care

Publication of reports as a joint analysis and assessment by the European Commission and the Council of the NAPs submitted by the member states.

The Joint Reports assess the progress made in the implementation of the OMC, set key priorities and identify good practice and innovative approaches of common interest to the member states on the basis of the submitted NAPs.

Establishment of a Community Action Programme to Combat Social Exclusion (future Community Programme for Employment and Solidarity – Progress).

Through this programme the Commission seeks to encourage cooperation between member states by:

- improving the understanding of social exclusion and poverty;
- promoting the exchange of information and best practice in the context of the NAPs;
- increasing the capacity of actors to address social exclusion and poverty effectively and to promote innovative approaches.

The Commission is responsible for the direct implementation of the Community actions covered by this programme. To this end, a Programme Committee made up of government representatives from the EU member states assists it.

The main activities carried out within the Community Action Programme to Combat Social Exclusion are the following:

- Peer Reviews and Assessments on Social Inclusion:

Peer reviews aim at benchmarking key policies or institutional arrangements of the host countries. These are critically analysed by a selected group of decision-makers and experts from other countries (“peer countries”), stakeholders’ representatives and European Commission’s officials.

The network of 28 non-governmental social inclusion experts aims at providing analysis and assessment on key policies and national plans to the DG Employment, Social Affairs and Equal Opportunities.

- Thematic Studies:

They are conducted by research institutes. Generally, they focus on policy measures, indicators, transnational comparisons and particular target groups.

- European Round-Table Conferences on poverty and social exclusion:

The annual European Round-Table on poverty and social exclusion aims at raising awareness and at promoting dialogue between all stakeholders in the context of the OMC. The event is jointly organised by the Presidency of the Council of the

European Union and the European Commission. The Fifth European Round-Table will take place in Tampere, Finland on 16 and 17 October 2006.

- Presidency events:

These events aim at mobilising all actors, including people who experience poverty with the purpose of involving them in the process as well as giving insight in daily- life experiences of these people. The fifth European meeting of people experiencing poverty took place in Brussels on 12-13 May 2006, and was organised under the Austrian Presidency of the EU.

- Awareness Raising Projects:

The objective of this call is to increase awareness about the preparation and implementation of the NAPs on Social Inclusion to all relevant actors.

- Transnational Exchange Projects:

In 2002, under the Community Action Programme on Social Exclusion, the Commission launched a Transnational Exchange Programme. PICUM's project is co-funded in the framework of this programme. This instrument will be soon replaced by the "Community Programme for Employment and Solidarity – Progress", which will be a simplified instrument of existing funding programmes in the field of employment and social policy.

Main actors involved

- Member states:

Every two years, member states present a "National Report on Strategies for Social Protection and Social Inclusion" as well as an "Implementation Report".

- European Commission:

The European Commission plays a key role as regards the coordination and stimulation of the process at different levels. Its main instrument is the "Community Programme for Employment and Solidarity – Progress".

- Independent social inclusion experts:

The experts play an important role within the framework of the "Peer Reviews" and of the "Assessments in Social Inclusion". They independently evaluate and monitor national policies and practices in order to report to the DG Employment, Social Affairs and Equal Opportunities.

- European Network Organisations and Research Institutions:

The Commission supports selected Research Institutions and key European-level networks involved in the fight against poverty and social exclusion. They are permanently involved in the different activities of the process.

- Stakeholders' representatives and NGOs:

Developing a more participative approach to policy-making is one of the key objectives of the Social Protection and Social Inclusion Process. However, participation in the context of social inclusion remains a challenge. There are still many barriers preventing public bodies, social partners, NGOs and other relevant actors from getting involved at each stage of the policy cycle. They participate through projects, round-tables and conferences.

- People experiencing poverty:

It has been underlined the importance of directly involving people experiencing poverty in the design, planning, implementation and evaluation of social policies. Their participation at European level is foreseen through the "Presidency events". At national level, however, the contribution of people experiencing poverty differs across countries. Certainly, only few countries structurally involve them in the development of policies.