

# Europe 2020 and the fight against poverty and social exclusion: fooled into marriage?

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## Introduction

Ten years ago, we wrote in one of the volumes of this series of the beginning of a new era in the political history of the fight against poverty and social exclusion in Europe, thanks to the launching of the open method of coordination (OMC) in this area, as part of the Lisbon Strategy. Like many other observers, we welcomed the fact that the issue of poverty and social exclusion was being included on the European social policy agenda. Although it was to be dealt with by means of a non-binding process of flexible political cooperation between Member States (the open method of coordination, or OMC), we hoped at last for a key step forward towards correcting one of the main forms of social injustice still affecting millions of people throughout the European Union (EU) (Peña-Casas, 2002).

Ten years have gone by, and the progress made seems limited, to say the least, if we only consider the specific outcomes. The growth, employment, environment, innovation and education objectives have not been met, and the social outcomes promised by Lisbon have not materialised (Cantillon, 2011; Vanhercke, 2011; Barbier C., 2010; Barbier J-C., 2010; Peña-Casas, 2010; Natali, 2009). Poverty levels in Europe have at best reached a plateau, and there has been an increase in economic and social inequalities, in unemployment and/or precarious employment. These phenomena have always affected the most vulnerable sectors of society, including the young, but, increasingly, they are impacting other groups which, *a priori*, should be less at risk, particularly workers. The Lisbon Strategy has been unable to counter these negative trends, and the challenges that they represent are still highly relevant to the new European medium-term strategy,

Europe 2020. This is particularly so since these negative social trends have become even more acute as a result of the on-going crisis affecting Europe since 2007. We do not have space here to list all these challenges<sup>1</sup>, so shall just mention two figures which are particularly significant in this context. In 2010, just over 80 million Europeans lived in a situation of financial poverty, i.e. 16.4% of the total EU population. If we use the broader definition of poverty, as expressed by the composite target<sup>2</sup> defined at European level (cf. Section 1.2.1.), which also includes those suffering serious material deprivation and/or living in a household with very low work intensity, more than 115 million Europeans are, using the current terminology 'at risk of poverty *or* of social exclusion', i.e. nearly one out of every four individuals (23.4%) (Eurostat, 2012).

The launching of Europe 2020, in June 2010, introduced certain elements, presented as innovative new features, to the European system for combating poverty and social exclusion. Europe 2020 has now been running for over a year and a half, so in this chapter we look at each of these elements and assess their implementation, to see whether they have made a positive difference to the struggle against poverty in Europe. The Strategy, namely, is defined at European level, but for these political guidelines to be effective, it is the Member States which must take them on board and implement them. Section 1 describes and discusses the new European anti-poverty tools introduced in Europe 2020. We thus look at the concept of inclusive growth, which underpins the approach to poverty-reduction, the introduction of a specific guideline on social inclusion, and how it fares under Europe 2020 and reinforced economic governance, and the introduction of a composite European poverty target, which Member States must convert into national targets. Section 2 focuses on the European platform against poverty and social exclusion, vaunted as the EU's flagship initiative in the area of social affairs, and its uneasy fit with the Social OMC, the survival of which, in an altered form, has only recently seemed guaranteed. The final section gives a number of conclusions to be drawn

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1. For a detailed picture of the situation and of social developments in Europe, cf. in particular SPC (2012a), European Commission (2011a) and Atkinson and Marlier (2010).
  2. In this chapter, we will use the term 'target' to mean a quantified measure acting both as a benchmark to be reached at the end of a programming period and as a tool to monitor progress towards this objective.

from the introduction of this new European poverty-reduction framework within Europe 2020.

## **1. Poverty-reduction measures in Europe 2020**

The OMC for poverty and social exclusion has had an eventful history since its beginnings in 2001. It was re-formed and ‘rationalised’ halfway through as part of the Growth and Employment Strategy, re-named the OMC on social inclusion - a change which reflected the greater emphasis placed on employment – and brought into a broader ‘Social OMC’, which also included the OMC on pension reform and healthcare (Daly, 2010). We shall not here assess the real impact of the OMC over the last ten years. Much has already been written on the subject, both on the governance method itself (Kröger, 2011; Vanhercke, 2010; Zeitlin, 2010) and on its impact at national and subnational level (Heidenreich and Zeitlin, 2009). Suffice it to say that somehow, despite the various reforms which it has undergone over its lifetime, and the new constraints created by EU enlargement and the economic crises, the Social OMC has remained consistent over time and preserved a relative consensus as to its key elements (common indicators and objectives, national plans and processes for joint evaluation and the exchange of good practices). It has also retained its emphasis on the need for a multidimensional approach which requires horizontal and vertical integration of the policies implemented. We can not here enter into a detailed presentation of the role of anti-poverty measures within Europe 2020, or, more broadly, within the new European governance structure, which has become considerably more complex in recent years. For this we would refer the reader to the in-depth analysis provided in the previous edition of this collection (Vanhercke, 2011; cf. also Daly, 2010; Marlier and Natali, 2010). There is a risk, however, that the new poverty-reduction framework set out in Europe 2020, while introducing factors which are new at European level, may undermine, even destroy what has been achieved by the Social OMC.

### **1.1 ‘Inclusive growth’**

The aim of Europe 2020 is that Europe becomes ‘a smart, sustainable and inclusive economy delivering high levels of employment,

productivity and social cohesion setting out a vision of Europe's social market economy for the 21st century' (European Commission, 2010a: 5). This bears many similarities to the well-known words of the Lisbon Strategy, except that, interestingly, the reference to the quality of employment has been replaced by the mention of productivity. Within this context, the Strategy is based on three main pillars, worded in such a way as to leave little doubt that its main objectives relate to economic growth (so-called 'smart, sustainable and inclusive' growth). 'Inclusive growth' refers to 'building a cohesive society in which people are empowered to anticipate and manage change, and consequently to actively participate in society and the economy' (European Commission, 2010a). In a striking turn of phrase, cohesion and social inclusion policies are thus reduced to a basic function: to equip individuals with the ability to anticipate and manage change. Poverty and social exclusion, this suggests, are largely the result of an inability to adapt to the market, just as unemployment is seen as the result of a lack of employability. Significantly, the objectives of the fight against poverty are assimilated to what became the key paradigm of the now defunct European Employment Strategy (Peña-Casas, 2008). This extreme simplification of the issues surrounding social cohesion and inclusion is not surprising, given the fact that the 'inclusive growth' pillar of Europe 2020 is an attempt to bring together under one headline a whole series of interactions and tensions between complex sets of policies. Up until then, each of these sets of policies had had its own flexible governance process, because of their multi-dimensional nature and the need for subsidiarity. There was an OMC for employment and social issues (poverty, pensions and health), but also the quasi-OMC for education and training. Priority is now very clearly given to employment, and, above all, to labour market participation and adaptability (flexicurity), the impact of which on growth probably seems more obvious *a priori* from the economic viewpoint. Europe 2020 is just one cog in the whole system of economic governance, the main purpose of which is to guide and monitor structural reforms.

To reduce poverty and social exclusion, the Member States, through their National Reform Programmes (NRPs) must ensure access and opportunities for all throughout their lifecycles, thus reducing poverty and social exclusion by doing away with obstacles to participation in the labour market. They must also improve economic and social cohesion, by promoting growth which generates employment. Countries should

therefore ensure that their labour markets are functioning properly, by investing in successful transitions and education and training systems, developing appropriate skills, improving the quality of employment and combating segmentation, structural unemployment, youth unemployment and inactivity. Reference is made to the need to ensure adequate and sustainable social protection as well as active social inclusion, with a view to preventing and reducing poverty, but this must be done strictly within the boundaries of the agreed fiscal consolidation measures (European Commission, 2010a). The concept of inclusive growth, which is behind the perception of poverty-reduction in Europe 2020, seems to be essentially geared to increasing participation and permanence in the labour market. A tentative allusion is made to the need for the Member States to give 'particular attention' to combating in-work poverty, and more generally to poverty among the groups most vulnerable to social exclusion (children, young people, etc.), but it is immediately tempered by a strong reference to the need to respect the constraints of budgetary correction and sustainability. We welcome, however, the inclusion of the territorial dimension when referring to the need to redistribute the (scarce) fruits of growth fairly between all individuals and territories. In itself, therefore, this concept of 'inclusive growth' only reflects very partially the multidimensional nature of the fight against poverty and social exclusion, although the guideline on social inclusion is more specific in this respect.

## 1.2 The Guideline on Social Inclusion

The first major innovation of the Europe 2020 Strategy was a new guideline on social inclusion, supported by one of the 5 headline targets of the Strategy (Council of the European Union, 2010a). Unsurprisingly, the Guideline is worded in such a way as to repeat the main points in the Social OMC common objectives, while clearly stressing participation in the labour market as a key priority of the fight against poverty (active inclusion) and the need to reform social protection systems to ensure their adequacy, while respecting budgetary constraints and the need for long-term sustainability (cf. Box 1). The Guideline also refers to more cross-cutting issues such as equal opportunities or non-discrimination. It defines the headline target on poverty, a point we shall come back to later (cf. Section 1.2.2.). The Guideline on Social Inclusion has been included in the Employment

**Guidelines, which, together with the economic guidelines, provide the key political orientations of Europe 2020.**

A number of relevant actors supported the introduction of a guideline on social inclusion. They saw it as a positive step forward which would link poverty-reduction more effectively into the Europe 2020 political process, or even make it a cross-cutting issue at both European and national levels by means of the NRPs (Vanhercke; 2011, Daly, 2010; EAPN, 2010a). They were somewhat disillusioned, however, by the interpretation of the guideline given firstly by the Member States (in the NRPs), and then by the Commission and Council<sup>3</sup>. It became clear that the fight against poverty actually played a relatively minor role in the overall scheme of European governance, which was geared to growth.

**Box 1 Guideline 10: Promoting social inclusion and combating poverty**

The extension of employment opportunities is an essential aspect of Member States' integrated strategies to prevent and reduce poverty and to promote full participation in society and the economy. Appropriate use of the European Social Fund and other EU funds should be made to that end. Efforts should concentrate on ensuring equal opportunities, including through access for all to high quality, affordable, and sustainable services, in particular in the social field. Public services (including online services, in line with guideline 4) play an important role in this respect. Member States should put in place effective anti-discrimination measures. Empowering people and promoting labour market participation for those furthest away from the labour market while preventing in-work poverty will help fight social exclusion. This would require enhancing social protection systems, lifelong learning and comprehensive active inclusion policies to create opportunities at different stages of people's lives and shield them from the risk of exclusion, with special attention to women. Social protection systems, including pensions and access to healthcare, should be modernised and fully deployed to ensure adequate income support and services – thus providing social cohesion – whilst remaining financially sustainable and encouraging participation in society and in the labour market.

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**3.** The NRPs are firstly assessed by the Commission at the end of the European Semester, and recommendations are made to Member States. Then, at the end of the year, the Commission draws up the Annual Growth Survey, which sets political guidelines with a view to the Spring Council. Annexed to this survey is the Joint Employment Report, which therefore also assesses the Social Inclusion Guideline, as well as a progress report on the Europe 2020 strategy.

Benefit systems should focus on ensuring income security during transitions and reducing poverty, in particular among groups most at risk from social exclusion, such as one-parent families, minorities including the Roma, people with disabilities, children and young people, elderly women and men, legal migrants and the homeless. Member States should also actively promote the social economy and social innovation in support of the most vulnerable. All measures should also aim at promoting gender equality.

The EU headline target, on the basis of which Member States will set their national targets, taking into account their relative starting conditions and national circumstances, will aim at promoting social inclusion, in particular through the reduction of poverty by aiming to lift at least 20 million people out of the risk of poverty and exclusion.

The population is defined as the number of persons who are at risk of poverty and exclusion according to three indicators (at risk of poverty; material deprivation; jobless household), leaving Member States free to set their national targets on the basis of the most appropriate indicators, taking into account their national circumstances and priorities (Council of the European Union, 2010).

### **1.2.1 A guideline which has been marginalised**

The first Annual Growth Survey, which came out at the beginning of 2011, had already given rise to some concerns. This period could be seen as a transitional stage, during which Europe 2020 and the European timetable of events was gradually taking shape. It was nevertheless already clear that the general objectives of Europe 2020 were subordinate to the economic governance objectives and cycle, and that within Europe 2020 the social inclusion measures were essentially focused on getting people back to work. This realisation provoked strong reactions from civil society representatives, who denounced the apparent abandonment of the anti-poverty objectives, as well as those concerning education and the environment. The European Anti-Poverty Network (EAPN) asked in particular for the Social Inclusion Guideline to be separated out from the employment guidelines, and for social concerns and sustainability objectives to be mainstreamed into all the Strategy guidelines, so that the fight against poverty and social exclusion was placed at the centre of European policy (EAPN, 2011a, b, c and d). The European Trade Union Confederation (ETUC) spoke out against the type of economic governance which gives priority to budgetary and

pay restrictions and which undermines social rights at a time of serious crisis (ETUC, 2011). In the run up to the Spring Council, the Social Protection Committee (SPC)<sup>4</sup> published its first annual report on the social dimension of Europe 2020, in which it gives its preliminary analysis of the NRPs and describes the various anti-poverty policies in context (SPC, 2011a).

The attention of the Council, however, remained largely focused on budgetary deficits and growth. The objective chosen for Europe 2020 was to move beyond the budgetary cuts and carry out structural reforms to promote growth, including measures relating to the fight against poverty and social exclusion (European Council, 2011).

An analysis of the policies to combat poverty and social exclusion listed in the NRPs shows clearly that the latter are focused on growth, and are not the best place to reflect accurately the complexity and cross-cutting nature of such policies. Thus the report drawn up by the European Network of Independent Experts on Social Inclusion emphasises that national economic and employment policies feature prominently in the NRPs, but not social policy. The NRPs refer to activation as a tool to combat poverty, but rarely consider an integrated approach such as active inclusion. There are few in-depth and clear analyses of the key challenges which must be met if we are to increase social inclusion. Although all NRPs cover the issue of poverty, they say relatively little about it and refer neither to the needs of particularly disadvantaged groups, nor to horizontal priorities such as equal opportunities or non-discrimination. The reforms proposed in the NRPs focus almost exclusively on growth and employment (Frazer and Marlier, 2011). EAPN's analysis of the NRPs makes the same points, but in more virulent terms. It expresses feelings of great disappointment, deception and anger at the approach generally taken at national and European level. EAPN also stresses the fact that the process for involving national stakeholders in the NRPs represents a step backwards compared to the

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4. The Social Protection Committee is made up of two representatives from each Member State and two representatives from the Commission. It provides support to the work of the European Council for Employment and Social Affairs, drawing up reports, drafting opinions and carrying out activities within its remit, on its own initiative or at the request of the Council or Commission. The SPC has a key role in the social dimension of Europe 2020. It is the social policy equivalent of similar committees in the areas of employment (the Employment Committee – EMCO) and of economic policy (the Economic Policy Committee – EPC).

Social OMC (EAPN, 2011e). Both analyses deplore the lack of attention given by most European Member States to the European poverty reduction target, a point we shall come back to later.

In June 2011, the end of the first European Semester for economic policy coordination also gave the Commission an opportunity to assess the NRPs drawn up pursuant to the guidelines, and, above all, to make recommendations to the Member States (European Commission, 2011b). Derruine and Tiedemann have made a detailed critical analysis of these recommendations. Their report stresses, in particular, the relative absence of anti-poverty objectives in the recommendations, but also of those relating to research and development or the environment<sup>5</sup>. The recommendations must generally respect the requirement for budgetary neutrality, so their scope is limited. The report suggests, in particular, that the 2020 Strategy be made legally binding, and that sanctions be introduced for non-respect of the recommendations. It is somewhat critical of the European Commission's Directorate General for Economic and Financial Affairs (DG ECFIN), which, it says, has too much influence compared to the other Commission DGs involved in the 2020 Strategy (Derruine and Tiedemann, 2011). In the context of European economic governance, then, the fight against poverty does not seem to be a key issue for the Commission or for Member States. The aim of the European Semester, as a vital element of the new reinforced economic governance, is to ensure that the collective discussions on major priorities take place at EU level before, rather than after, national decisions are taken. The outcome of these discussions then needs to be applied through decisions taken at national level. For this to be the case, though, a clear and firm message needs to be sent out concerning European priorities. This has been done for budgetary reform, and, to a lesser extent, for structural reform. When it comes, however, to the fight against poverty, the only message given has been that Member States should 'do more' to achieve progress towards the social inclusion objective. This is hardly what one could call a strong message.

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5. Only very few countries were given a recommendation related to poverty. Any such recommendations, moreover, were generally indirect, with poverty mentioned in relation to the labour market (Estonia) or in terms of financial support to particular groups such as pensioners (Cyprus) or people on a low or medium income (Austria, Belgium, Germany, Hungary and Slovakia). Bulgaria was the only country to receive a specific recommendation concerning the need to deal with the challenge of combating poverty.

The recent publication of the Annual Growth Survey for 2012 has enabled us to assess whether the criticism voiced as to the minor role given to the fight against poverty and social exclusion has been taken on board. The evidence would suggest that it has not. The only evaluation of the Social Inclusion Guideline contained in the Joint Employment Report (Annex 3) is a rapid overview of actions taken by the Member States in a number of areas<sup>6</sup>. The joint report does, however, voice concerns, in the light of the national targets set in the NRPs, that the European targets on poverty, as well as on education and the rate of early school leavers, are not being met (European Commission, 2011c). This pessimistic view is repeated in the Progress Report on the Europe 2020 Strategy (Annex 1). The Report does not make direct reference to the Social Inclusion Guideline, but embarks on a broader discussion of poverty reduction measures in the context of actions undertaken by the European Platform against poverty and social exclusion (see later on, Section 2). Although the report acknowledges that the fight against poverty is an important objective in itself, it is essentially presented in terms of its impact on growth. It is important, it states, to improve the resources of poor people – and of others – and to increase their participation in the labour market in order to stimulate demand and encourage a robust economic recovery. From this perspective, the modernisation of social protection systems along the lines of the active inclusion common principles (adequate minimum income, inclusive labour market and access to effective and affordable social services) is presented as the cornerstone of the fight against poverty. Access to effective and affordable (public) services plays a key role in reducing private expenditure, and hence raising disposable income, mitigating income poverty and inequality. The Commission also addresses the question of access to and costs of housing, as well as that of banking exclusion, but chooses to overlook the issue of access to healthcare, something which is, however, strongly emphasised in the Joint Employment Report (European Commission, 2011d). This discrepancy between the various documents is even clearer when we reach the end of the chain and examine the Annual Growth Survey itself. The Survey does not directly refer to the fight against poverty, but devotes scarcely

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6. Improving social protection systems, thus enabling them to fulfil their role as social stabilisers, labour market participation of vulnerable groups, active inclusion, the use of *ex ante* assessments of the social impact of budgetary reforms, access to energy, housing, transport and healthcare.

half a page to 'protecting the vulnerable'. To this end, the Commission suggests that Member States give priority to improving the effectiveness of social protection systems and making sure that social automatic stabilisers can play their role until employment growth substantially resumes. Member States must implement active inclusion strategies, but should also guarantee services supporting integration in the labour market and in society, such as access to a basic payment account, electricity and access to affordable housing (European Commission, 2011d). In its opinion on the 2012 Annual Growth Survey, the SPC attempts to re-emphasise the key role of social protection. It underlines strongly how the social situation in Europe has worsened since the crises, and how this has put more pressure on social protection systems. These systems help not only to cushion the impact of the crisis, but also to maintain demand and therefore growth. The SPC insists on the need to ensure that the budgetary measures taken in the context of economic governance do not have a negative impact on the resilience of social protection systems. It also stresses the importance of improving budgetary measures so that these meet the long-term requirements of citizens. The need to maintain the capacity of social protection systems to combat poverty and inequalities is also highlighted (SPC, 2012b).

It is now more than a year and a half since the official launching of Europe 2020. The Social Inclusion Guideline is still a long way from having the predicted impact on the Strategy, in terms of establishing social inclusion as a priority and of influencing policy, if we are to judge by the various key stages of the new European governance cycle. At the outset the content of the guideline is a fairly accurate reflection of the objectives of the Social OMC. Its content, however, is diluted more and more as it is interpreted in an ever more restrictive fashion in the workings of the Strategy and then moves through the system of European economic governance. Over time, then, the complex issue of the fight against poverty and social exclusion is reduced to the contribution it can make to growth. The principal concern is how to put as many people to work as possible, and how to support income-levels in order to promote consumption, with particular attention given to the most vulnerable groups. Member States, moreover, have done little to include the social dimension in the rigid context of the NRPs, which do not lend themselves to these issues, focused as they are on growth. This gradual dilution of the content of the Social Inclusion Guideline, replaced by an approach geared almost exclusively to growth, is the

result of two flaws in the system which have emerged clearly since European governance has begun to concentrate more openly on economic issues.

The first of these is the imbalance of power and influence between the economic and social actors involved in the process at the various political levels. This imbalance exists at European level, between the Councils or, within the Commission, between Commissioners and their respective Directorate Generals. At national level, the Prime Minister's office and that of the Minister of Economic Affairs are responsible for the NRPs and their social strand, rather than the ministers who usually deal with social issues. The second problem is a shortcoming in the democratic process. The procedure for drawing up Europe 2020, and above all the economic governance system, leave little room for consultation with the social partners, and, in particular, with civil society on issues pertaining to the fight against poverty. This failure to involve such groups again exists at both European and national level, and brings with it the risk that the progress made so painstakingly under the Social OMC will now be reversed. The democratic deficit has also become more acute with the new European economic governance system, particularly when it comes to adopting budgetary restrictions (Barbier, 2011).

### **1.2.2 A dubious European objective**

Europe 2020 introduced another new element to the fight against poverty: a quantified European anti-poverty objective, which was adopted with some difficulty, to say the least. It is contained within the Social Inclusion Guideline and is one of the five Europe 2020 headline targets. This idea was not new, but had, until then, met with resistance from some Member States, as no agreement could be reached on using an at-risk-of poverty rate as an indicator for a common target. Following tough negotiations, a compromise was finally reached. There would be a European poverty target, but its nature had radically changed during negotiations. Thus the Guideline states the following: 'The EU headline target, on the basis of which Member States will set their national targets, taking into account their relative starting conditions and national circumstances, will aim at promoting social inclusion, in particular through the reduction of poverty by aiming to lift at least 20 million people out of the risk of poverty and exclusion'

(Council of the European Union, 2010). Those 'at risk of poverty OR social exclusion' are defined using a combination of three non-cumulative indicators (at-risk-of poverty rate and/or material deprivation and/or living in households with very low work intensity). According to the Commission, this definition reflects the multiple factors underlying poverty and/or exclusion, the diversity of problems that Member States face and the priorities that they have therefore set out (European Commission, 2010b).

This agreement, resulting from a political consensus rather than from a sound methodological base or consultation of other parties, is problematic in a number of ways. There is no space here to go through all the methodological problems relating to the European target, in terms of the combination and choice of indicators (Nolan and Whelan, 2011; Walker, 2010). We will, then, just touch briefly on two serious political problems.

The first of these is the de facto reference status given to a dubious composite indicator. This indicator was given pride of place at the top of the hierarchy of European poverty and social exclusion indicators, purely by virtue of its adoption by the European Council as a headline target for Europe 2020. The Strategy introduces a new way of measuring poverty, which threatens to supplant the at-risk-of poverty rate as the European reference indicator which would then have to be used nationally. Such a change would be a significant one. It would mean that an approach to poverty-reduction based on redistribution and the reduction of inequalities would be supplanted by a more economic approach. According to this new approach, promoting economic growth and increasing labour market participation 'is sufficient' to reduce material deprivation or the number of jobless households. This is the general line taken by Europe 2020, as we have previously emphasised.

The second difficulty with this agreement is that Member States are free to set their national targets on the basis of those indicators making up the composite target which they feel to be most appropriate, taking account of their situation and priorities. It would have been better if the European target had come hand in hand with targets for each of the individual indicators, and if each country had been asked to set its own targets for these indicators. Although many countries have selected a

national target based on the European composite indicator, it is difficult in most cases to assess how much emphasis will be placed on each component (SPC, 2011a). There is a risk that some countries will focus on the indicator easiest to handle instead of taking a multi-dimensional approach to poverty-reduction. In this way they may end up concentrating in their policy choices on growth and employment rather than on redistribution, especially in the current context of budgetary austerity and the decline in the role of the State (Zeitlin, 2010).

A close look at the national targets adopted by Member States unfortunately confirms most of these fears. The Joint Employment Report contains an evaluation of the Social Inclusion Guideline. It states that an aggregation of provisional national objectives shows that the EU still has a long way to go to meet the major objectives set by the European Council. The diverse definitions used, says the report, make it impossible, as things stand, clearly to take stock of the commitment of Member States (European Commission, 2011c). The progress report on the Europe 2020 Strategy speaks out more clearly, stating that the EU's objective to lift at least 20 million people out of poverty or social exclusion by the year 2020 will not be met if the current national objectives are retained, since these cover at best 12 million individuals. The same point is in fact made for the other social headline targets (education and rate of early school leavers) (European Commission, 2011d). The report from the Network of independent experts on social inclusion stresses the shortcomings of the national targets, stressing the fact that they are unable to take account of the needs of vulnerable groups, as well as regretting their lack of clarity and ambition (Frazer and Marlier, 2011). EAPN strongly condemns the arbitrary choices made by certain countries and their inability to meet the European headline target, which shows how little real importance some of them attach to poverty-reduction. It also stresses the lack of consultation in the drawing up of national targets (EAPN, 2011e). Indeed, if we take a closer look at the way in which Member States have responded to the European target and have entered into poverty-reduction, future prospects do not seem particularly bright<sup>7</sup>. As well as the diverse choice

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7. Only seventeen countries made use of the European composite definition to set their national targets. Bulgaria, Romania and Estonia used the at-risk-of poverty rate. France and Ireland chose indicators used to set targets already applying to national strategies (at-risk-of poverty rate anchored at a fixed moment in time, lasting poverty [at-risk-of poverty rate combined

of indicators used to set the national targets, which makes the situation almost impossible to monitor at European level, there is a worrying lack of commitment from Member States to address their own circumstances. The most striking example is that of Germany, which plans to reduce the number of long-term unemployed by only 330,000, when almost 16 million German citizens are at risk of poverty or social exclusion (European Commission, 2011d)!

As things currently stand, therefore, the introduction of a European target and its transposition into national targets and commitments seems not to have been particularly successful. Neither the Social Inclusion Guideline nor the European target have really resulted in the fight against poverty and social exclusion being accepted as a fundamental dimension of Europe 2020. The general impression seems to be that there has been a step backwards compared to the Social OMC, since the complex and multi-dimensional nature of the fight against poverty and social exclusion, reflected, in particular, in the common objectives of the OMC, has gradually been diluted and reduced purely to its economic functions. The low level of commitment from Member States, in particular the largest of these, is worrying in terms of the real future prospects of the fight against poverty and social exclusion at European level. Importantly, this does not necessarily mean that European countries have given up efforts to reduce poverty, since strategies are still being implemented at national level, particularly under the impulse of the OMC (the National Action Plans on Social Inclusion – NAPs/inclusion), and are not fully reflected in the NRPs. The NAPs/inclusion and the OMC, however, have now come to an end. Their fate remains uncertain, especially since doubt was shed on their status by the other new feature of Europe 2020, a flagship initiative setting up a European platform against poverty.

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with material deprivation]). The United Kingdom just used the same targets as those already set in the plan to combat child poverty. Three countries set their targets solely with reference to specific groups of the jobless population: the Netherlands (jobless households), Germany (the long-term unemployed) and Sweden (people not part of the active population – apart from full-time students – as well as the long-term unemployed or workers on long-term sick leave). Luxembourg decided not to set a national target (European Commission, 2011d).

## 2. The European platform and the future of the Social OMC

The Commission introduced the so-called ‘flagship initiatives’ to Europe 2020 as one of the innovations in the area of governance. These Commission flagship initiatives target certain ‘engines to boost growth and jobs’, areas in which the EU and national authorities must coordinate their efforts so they are mutually reinforcing<sup>8</sup>. The objective of the flagship initiatives is to stimulate progress on each priority theme, acting as a catalyst for stakeholder actions, and carrying out actions to enable the delivery of the headline targets of Europe 2020 (European Commission, 2010a). One of these engines of growth is the fight against poverty and social exclusion, which has its own flagship initiative: the European Platform against poverty and social exclusion (henceforth the Platform).

The Platform aims at ‘creating a joint commitment among the Member States, EU institutions and the key stakeholders to fight poverty and social exclusion’ by setting up a ‘dynamic framework for action to ensure social and territorial cohesion such that the benefits of growth and jobs are widely shared across the European Union’ (European Commission, 2010b). Five main priorities are set out: (i) delivering actions across the policy spectrum (ii) greater and more effective use of the EU Funds to support social inclusion (iii) promoting evidence-based social innovation (iv) working in partnership and harnessing the potential of the social economy and (v) enhanced policy coordination among the Member States. The purpose of the Platform is therefore *a priori* to provide support for the Commission tools and procedures helping with coordination of the intergovernmental political process. The Platform takes from the Social OMC most of the existing arrangements for dialogue between European actors (funding of European actors, an Annual Convention on poverty and social exclusion, meetings at European level of people living in poverty, etc.). It will also provide support for research, the identification of good practices and the encouragement of mutual learning (peer reviews and social innovation),

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8. As well as the Platform against poverty, the flagship initiatives ‘Agenda for New Skills and Jobs’, as well as ‘Youth on the Move’ are directly related to the fight against poverty. There are also possible links to the other flagship initiatives (digital agenda, innovation, industrial policy and efficient use of resources).

support to social inclusion projects via the structural funds, and to the definition of common principles (active inclusion, integration of the Roma, etc). The Commission Communication also sets out a long list of future initiatives together with a timetable (European Commission, 2010c).

Although the Platform largely replicates measures already existing at European level under the Social OMC, there is considerable ambiguity as to the relationship between the Platform and the Social OMC itself, leading some to fear that the latter is to disappear. Certain components of the Social OMC, vital when it comes to implementation at national level, have been left out. Thus no mention is made of the jointly-agreed objectives and indicators, the national action plans or the fate of the participatory structures set up by Member States in relation to this work. Many actors in the field voiced concerns as to this ambiguity as soon as the earliest versions of the Commission proposal were made public (EAPN, 2010b). In its March 2011 opinion on the Platform, the SPC underlines that coherent and concrete implementation of this integrated approach can only be achieved with the support and joint commitment of all relevant levels of government, the social partners and civil society, according to their respective roles and competences. It asks for implementation of the set of actions and future proposals announced in the Platform to take advantage of the experience gained in ten years of policy coordination under the Social OMC. The SPC intends to play an active role in the implementation of the actions planned under the Platform (SPC, 2011b). The EPSCO Council of March 2011, in its conclusions on the Platform, endorses the SPC Opinion. It stresses the need to reinvigorate the Social OMC to help Member States to meet their national targets for promoting social inclusion and poverty reduction, and asks that it base itself on the key thematic issues that have emerged from experience of the Social OMC. The Council also invites Member States to proceed with developing and implementing their national strategies. A sixth priority area is added to the Platform, relating to the application of common active inclusion principles. The Council also invites the Commission and Member States to clarify with the relevant stakeholders, and in the light of the experience of the first European Semester, how best the OMC can contribute to the governance of the Europe 2020 Strategy and to the implementation of the objectives of the Platform and vice versa (Council of the European Union, 2011a). The need to reincorporate the Social OMC and its achievements more clearly into the new system is also strongly emphasised by civil society, the social

partners and the European Parliament in their opinions on the Platform (EAPN, 2011h; EESC, 2011; European Parliament, 2011).

The future of the Social OMC within Europe 2020 could seem more secure after this reaffirming of its importance. Yet there are still a number of points requiring clarification and steps which need to be taken if its role within the Strategy and the context of economic governance is to be ensured.

One of these steps was the adoption by the June 2011 EPSCO Council (Council of the European Union, 2011c) of the SPC Opinion on the future of the Social OMC within Europe 2020. This was the fruit of a concerted effort by the various actors involved, and took account of the first lessons learnt from the NRPs (SPC, 2011c). In this Opinion, the SPC states its view that the Social OMC should continue working in a holistic way along its three strands, and should become a visible expression of Social Europe. The SPC emphasises the central role to be played by the OMC and its specific nature which allows it to carry out effective policy coordination in the social field and to be the driving force of social policy initiatives on the European level, encompassing adequacy, financial sustainability and modernisation of social protection systems. The SPC also describes the general form to be taken by the renewed OMC within the context of Europe 2020: (i) reaffirming the common objectives on social protection and social inclusion (ii) 'lighter' strategic reporting by Member States to present their strategies and progress achieved towards the common objectives (iii) assessing the progress achieved towards meeting these objectives (iv) enhancing mutual learning (v) maintaining and developing the set of common indicators used for the Social OMC (vi) enhancing stakeholders' involvement measures developed under the OMC and (vii) developing synergies with the Platform. It should also be noted that the EPSCO Council of June 2011 backed the SPC's technical review of the commonly agreed objectives of the Social OMC, particularly with regard to social inclusion<sup>9</sup>, thus returning these objectives to the core of the process, especially within the Platform.

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**9.** The common objectives aimed at giving a decisive impulse to the eradication of poverty and social exclusion are: (1) ensuring access for all to the resources, rights and services needed for participation in society, preventing and addressing exclusion, and fighting all forms of discrimination leading to exclusion; (2) ensuring the active social inclusion of all, both by promoting participation in the labour market and by fighting poverty and exclusion; (3) ensuring

At European level, formal procedures still need to be established to integrate the objectives and phases of the new Social OMC into the Europe 2020 system (Platform and Social Inclusion Guideline), and to synchronise them with the rest of the process. This is no easy task, since the various processes involved are closely interwoven and subject one to another. We have already shown how the Guideline, representing social policy, was marginalised within Europe 2020 and the reinforced economic governance of the EU (see Section 1.2.1). We do not yet know how the common objectives of the Social OMC, concerning, in particular, adequacy, financial sustainability and modernisation of social protection systems, will be highlighted and interpreted in these essentially economic processes.

From this viewpoint, the real priority is to clarify what type of synergy is expected between the Platform and the Social OMC, and, above all, how this synergy would work. It may well be that the Commission and the Member States are to encourage cross-fertilisation and mutual reinforcement of these processes, but no decision has been taken as to how such interaction would work. The substance of the Platform, as defined at European level, must clearly reflect the central role of the Social OMC. It must take on board its various components, particularly the common objectives on social inclusion and social protection, as well as its *modus operandi* vis-à-vis the Commission and Member States. Member States must once again take ownership of this new-style Social OMC and successfully negotiate the transfer of bodies and processes laboriously developed over a decade of OMC to national platforms. In order for them to do so, Europe must send out a clear message as to objectives, the responsibilities of each partner involved and the various types of interaction and complementarity.

At national level, the addition of reporting on social issues to the NRPs should make it easier to restore the social dimension of Member State policies to Europe 2020. Only time will tell, however, whether this social reporting will reflect a continuation of the social inclusion strategies developed by countries under the Social OMC, or be no more

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that social inclusion policies are well-coordinated and involve all levels of government and relevant actors, including people experiencing poverty, that they are efficient and effective and mainstreamed into all relevant public policies, including economic, budgetary, education and training policies and structural fund (notably ESF) programmes (SPC, 2011c).

than a low-key social policy appendix to the NRPs. In the same way, the shift from the national Social OMC bodies to national anti-poverty platforms is not straightforward. It is important to set out clearly how such a shift would work, in order to strengthen what already exists while making certain improvements, especially in terms of involving and mobilising all stakeholders. We have already highlighted the loss of interest of certain Member States, including some of the largest, in the European composite target for the fight against poverty and social exclusion. These same countries would probably balk at the idea of reintroducing a full Social OMC, geared towards a horizontally and vertically integrated multidimensional strategy. A clear message sent out by Europe to the effect that the Social OMC remains should encourage them to maintain such strategies. The NAPs/inclusion have reached the end of their multiannual programming period, and Member States should already have launched their processes for defining and consulting on future strategies. The on-going ambiguity as to the fate of the Social OMC, however, which first arose at the launching of the Platform, has put a stop to this work, which some countries were more actively engaged in than others. There is a lack of clear communication at European level on their structures and content, and little time remains before the addition of social reporting to the NRPs (mid-April). The best option, then, would be for Member States to continue with their current national action plans for a certain period, to give themselves time to draw up new strategies, thinking in terms of a multiannual approach and respecting existing consultation arrangements. The reports on social issues added to the new wave of NRPs would be, initially at least, summaries of the pre-Europe 2020 strategies, and could be amended during successive stages in the cycle.

## **Conclusions**

When new policy coordination tools were introduced into the Europe 2020 Strategy, to breathe new life into the fight against poverty and social exclusion, there was much speculation as to how they would work in practice. It is now more than a year and a half since the Strategy was launched, and we have gone through a full cycle of the system for reinforced economic governance. It is now possible, then, to carry out an initial assessment of the effects of these new measures.

The creation of a new Guideline on Social Inclusion was presented as a way of reaffirming the role of the social dimension within Europe 2020. The impact of this Guideline was limited from the outset by its inclusion in the employment guidelines, under the aegis of a priority on inclusive growth. This priority encompasses social and employment policies, its main thrust being to increase participation in the labour market and adaptability. The complex issue of the fight against poverty and social exclusion is interpreted in a particular way by Member States in their NRPs, as part of Europe 2020, then by the Commission and the economic governance process, and emerges reduced to its purely economic aspects and its impact on growth. It does little to establish the social dimension of Europe 2020. Its aim is essentially to promote maximum participation in the labour market and to support income in order to promote consumption, with particular attention being given to the most vulnerable groups. Even the idea of active inclusion, the spearhead of the Social OMC in the area of employment, is barely emphasised, and is often seen purely in terms of activation. Social protection is praised for its role in attenuating the social impact of the crisis, but is put under pressure by ever tighter budgetary restrictions and constant demands for modernisation of its systems in order to eliminate its work disincentive effects and improve its financial sustainability. This gradual dilution of the content of the Social Inclusion Guideline is the result of an imbalance of power and a lack of participation. Economic players have played by far the major role in the drafting of the political guidelines underpinning the Strategy and the system of economic governance, at both European and national levels. There is also an ever more striking democratic deficit within Europe 2020 and, above all, in the governance process: there is very little consultation of or attention paid to civil society representatives or the social partners, or to other European institutions such as the EESC or the EP. Ways must urgently be found to correct these flaws, if Europe 2020 is to acquire a minimum level of credibility vis-à-vis stakeholders and the European public.

It is still more worrying to see how little Member States have taken on board the social objectives of Europe 2020. The Member States have taken little account of the social dimension in the restricted context of the NRPs, which do not in any case lend themselves to such issues, since they are strongly focused on growth. The adding of social reporting to forthcoming NRPs should make it possible to give more

emphasis to the social dimension. It is still not known, however, how these reports will be structured, and whether they will reflect real integrated strategies to combat poverty and social exclusion. The limited success of the new European target and the resulting national targets and commitments is also very worrying in this regard. The introduction of a new way of measuring poverty, of dubious quality, will cause confusion in future European action on poverty, but has also undermined the relative consensus which existed among Member States as to the need for and the nature of policies to be used to combat poverty. By giving Member States the freedom to choose which of the components of the composite target they would like to emphasise when fixing their national targets, a breach has been opened. We do not yet know how significant it may become, particularly when it comes to integrated social inclusion strategies.

The return of the Social OMC in a new form, developed in close synergy with the European Platform, could be one way to continue encouraging Member States to keep focusing on the fight against poverty and social exclusion, but also to reinforce the social dimension of Europe 2020. The future of the Social OMC seems somewhat more secure since Council restated its usefulness and content. The on-going ambiguity as to its future, however, which arose when the Platform was launched, has led to significant delays in integrating the two systems. At European level, it is vital to clarify the type of synergy expected between the Platform and the Social OMC, and, above all, how such synergy would work. Formal procedures are also needed to integrate the objectives and various phases of the Social OMC into Europe 2020 (Platform and Social Inclusion Guideline), and to synchronise these with the rest of the process. If Member States are again to take ownership of the new Social OMC, Europe needs to send out a clear message as to the objectives and responsibilities of all partners, as well as giving more details as to the interaction and complementarity between the various systems.

Given the small part played by the social dimension in Europe 2020, it would be better for the social objectives to be taken out of the employment guidelines. This would make them more prominent and more independent of an approach almost entirely geared towards growth and employment. The next opportunity, however, to make in-depth changes to the Strategy is not likely to arise before 2014, i.e.

about halfway through its duration, when the Commission will assess its various components (guidelines, objectives, and flagship initiatives) as well as the budgetary perspectives. This is something for which we should be well prepared!

In conclusion, there is a fundamental paradox between the gradual erosion of the anti-poverty objectives, and, more generally, of the social dimension, in the current European economic governance framework, and, on the other hand, the need to meet social policy challenges which have become greater as a result of the on-going crisis of the last four years. Europe must respond to these challenges if it wishes to be seen by its citizens as anything other than a bringer of austerity. The recent European Council recalled that the social dimension of Europe 2020 is the way to bring Europe closer to its citizens, and that it is absolutely vital to tackle the challenges of unemployment and the social consequences of the crisis (European Council, 2012). This is particularly true in the current climate of social tension reigning in several European countries. The route to be taken, however, is still not clearly indicated.

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