Pedagogical Guide

The Trade Unions and the fight against poverty and social exclusion
Trade unions and the fight against poverty and social exclusion
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Foreword

Georges Schnell
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This training guide on the theme of poverty and social exclusion in Europe has been drawn up by the Education Department of the European Trade Union Institute (ETUI) in cooperation with the European Trade Union Confederation (ETUC) and with the backing of the European Commission. It aims to capitalise on the momentum created by 2010 The European Year for Combatting Poverty in order to hinge the trade union practices of the ETUC’s member organisations in a lasting and proactive manner around five specific themes.

Designed first and foremost as a militant tool in the hands of the militants, this guide is therefore far from being “yet another” document on poverty and social exclusion in Europe.

For this training guide, we were eager to find a common identity, making it possible to broach the various themes on the basis of documents structured around a common plan, namely:
– the definition of the concept;
– experience of this concept at European level and in the various countries;
– their role in the fight against poverty and social exclusion and the conditions of implementation;
– the interferences with other strategies developed at national or European level;
– the trade union strategies to be developed.

We came up with the idea of supplementing it with a glossary, making it possible to define certain terms (for example minimum wage/minimum income /... the meaning of the term “co-payment” within the framework of the financing of social protection, etc.) which will be added after the ETUC Congress in May 2011.

Finally, the document will end with a reminder of the ETUC’s positions on each of these subjects, etc.

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Against poverty: Acting for Employment and Social Protection

Józef Niemiec
Confederal Secretary

The issues raised by poverty and social exclusion are a matter of grave concern for the ETUC. Along with its organisations in the field, it has been taking action and fighting against these evils for over 20 years. Fighting against poverty not only means taking curative action. It implies applying preventative measures before the cancer takes root by reinforcing and improving the social protection systems. But the actions must be deployed on two fronts at the same time: social protection and employment. Employment, wages and poverty are inextricably linked, justifying the mobilisation and decisive action in these areas.

The trade unions and the ETUC, which represents them at European level, play an indispensable role in this respect. That is why the initiatives generated by 2010 The European Year for Combating Poverty and Social Exclusion provided an opportunity not only to shore up its determination and mobilisation, but also to develop the necessary synergies with the other stakeholders, in order to create conditions that will allow poverty and the resulting social exclusion to be effectively eradicated within the European Union.

It is quite a challenge, and one that can only be taken up if all the stakeholders sign up for it and inject the necessary efforts into seeing it through to completion. This training guide is designed to become a working tool of the trade union organisations by providing them with theoretical information and practical examples that should help raise awareness among trade union militants and channel the planning of the trade union action strategies in this field.

This guide is the fruit of cooperation between the European Trade Union Confederation and the Education department of the European Trade Union Institute. I would like to extend my heartfelt acknowledgments to all those who contributed to its preparation, and in particular to Henri Lourdelle and George Schnell, who conducted and supervised the work.

Naturally, the ETUC’s action does not date from the launch of this European year. The actions planned in 2010 merely supplement the ETUC campaigns relating to employment, social protection systems and quality public services and are consistent with the negotiation conducted within the framework of the social dialogue between the European social partners on the development of an inclusive employment market.
Europeans will continue to feel the social repercussions of the crisis for a long time to come. A strong and sustained mobilisation and a determined commitment of the ETUC and of its organisations to fight against poverty are necessary more than ever before. Driven forward by the momentum created by the 2010 European Year for Combating Poverty, the Guide aims to hinge the trade union practices of the ETUC’s member organisations around a lasting and proactive work programme over the years to come.
The fight against poverty and social exclusion: For the ETUC, a substantive commitment

Henri Lourdelle, ETUC Advisor

The ETUC and its organisations have long since been active in the fight against poverty and social exclusion, despite a few raised eyebrows. Indeed, some believed that the trade unions sometimes gave the impression that they were more concerned about the situation of those in employment and whose situation was already becoming insecure – a concern that is moreover legitimate – than about those who were excluded from the labour market.

While this may have been the “impression”, it was never “actually” the case, even if the first commitments obtained from the European Union in this field were effectively focused on ... workers.

For example, in the 1980s and 1990s, the ETUC and its organisations rallied in favour of basic social rights, a mobilisation that resulted in the adoption by the European Council of Strasbourg on the 9th of December 1989 of a “Charter of Fundamental Social Rights of Workers” leading up, on the 24th of June 1992, to a Council Recommendation “on common criteria concerning sufficient resources and social assistance in social protection systems”, which was one of the first concrete outcomes.

However, this first result was not enough for the ETUC and, on the 9th and 10th of June 1994, its Executive Committee adopted a resolution entitled: “Commitment of the ETUC to the fight against social exclusion – For a Europe without exclusion”.

In March 1998, in response to the Commission Communication entitled “Modernising and improving social protection”, the ETUC Executive Committee called for a guaranteed minimum income to be included as one of the fundamental social rights to be enshrined by the European Treaty.

And during the ETUC Congress in Helsinki in June-July 1999, in its final Resolution, the ETUC and its organisations called for the definition of “guidelines for social convergence ... and by setting (in particular) as goals the creation of a base of basic standards in the field of social protection relating to:

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– A guaranteed income for all
– The guarantee of a minimum pension™ in the field of social protection, as had been done in the field of labour policy “in order to fight against any form of exclusion and social marginalisation”.

In March 2000, these mobilisations were to lead during the Lisbon Summit³ to the implementation of the Open Method of Coordination (OMC) committing the Member States to work in close cooperation. This “method” consists of defining common objectives, of translating them into national action plans, of evaluating their effective implementation, in particular on the basis of qualitative and quantitative indicators, and, in particular, of an evaluation by peers. At the Nice European Council in December of the same year, the Member States adopted four key goals to be achieved within the scope of the national action plans for social inclusion:

– to facilitate participation in employment and access by all to resources, rights, goods and services;
– to prevent the risks of exclusion;
– to help the most vulnerable;
– to mobilise all relevant actors.

The action of the ETUC also comes within this scope, mainly by insisting in its strategy and its mobilisations on the “prevention of risks of exclusion” and in particular on four primordial factors in this field:

– income;
– access to quality social services;
– the development of quality social protection systems, based on solidarity;
– and, of course, access to quality jobs and wages for all.

The fact is, fighting against poverty and social exclusion does not only mean necessary though it is “dealing with/acting on” the consequences, but also involves pre-emptively tackling the causes.

This is the underlying goal of the agreement signed⁴ by the European social partners within the framework of the social dialogue “for an inclusive labour market”.

This training manual for trade union teams keen to include the fight against poverty and social exclusion in their strategy has been put together according to this approach and is hinged around these four themes.

This training manual therefore includes two parts:

– a « theoretical » part hinged that discusses and examines the arguments pertaining to each of these themes, drawn up with the help of trade union social protection « experts »;

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2. Resolution of the Congress, §40, p.38
3. 23-24 March 2000
4. 25 March 2010
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- a « practical » part comprised of « activity sheets » drawn up by trainers from the European Trade Union Institute, the trade union training department.

The question of poverty was not solved when the curtain came down on “2010, the European Year for Combating Poverty and Social Exclusion”.

Citizens and workers have borne the brunt of the “crisis” and been left helpless to do anything about it. That is why the trade unions need to be more mobilised than ever before. This training manual sets out to be a collective tool to inform this action.

It is therefore up to us to ensure that the objective laid down in the “2020 agenda” to reduce the number of poor persons within the European Union by 20 million is not only kept but - why not? – exceeded.

5. 25 mars 2010
The distribution of income in the fight against poverty

1. introduction: what do we actually mean by poverty and social exclusion?

So what are we actually talking about when we speak of poverty and social exclusion?

First of all, what is poverty?

When poverty is mentioned, what first comes to mind is often the notion of “monetary” poverty. It is this pecuniary dimension that is most frequently taken as a yardstick because it is often that which prevents access to food, clothing, housing, education, etc.

But it is not just a matter of pecuniary poverty. Poverty is a multidimensional phenomenon that, naturally, takes into consideration the ability to feed oneself and one’s family but also to cater for non-food needs (clothing, transport, hygiene, water, energy, education, culture, etc.). In this case, we talk of the “absolute” measurement of poverty.

If we only take into account living standards, then we talk of a “relative” measurement of poverty.

The European Union has set the “relative” poverty threshold at 60% of the average income, not the European average but the average of each individual country. This percentage is calculated after social transfers (see box). These thresholds vary therefore according to the standard of living of each country and they are often calculated as “a parity of purchasing power”\(^5\).

Therefore, according to Eurostat, in 2008 (i.e. before the crisis) 17% of the European population was poor, with variations ranging from 11% in the Netherlands, to 23% in Romania, but also with rates of around 20% in the United Kingdom, Italy, Spain or Greece !

These rates also vary according to age. Generally speaking, the risk of poverty is higher for populations under the age of 18 (Romania 33%, Bulgaria 26%, Italy 25%, Spain 24%, Portugal, Greece and United Kingdom 23%.

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\(^5\) Purchasing power parity is a calculation making it possible to take into account the cost of living in each country, in other words it is what one person can buy with 100€
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Poland 22%), and those over the age of 65 (Bulgaria 34%, United Kingdom 30%, Spain 28%, Romania 26%, Finland 23%).

They also vary according to gender, in particular within certain countries. While, on a European average, the poverty rate stands at 16% for men and 17% for women, women are poorer by 3 points in Bulgaria (20 and 23%), in Spain (18 and 21%), in Italy (17 and 20%). However, as was pointed out by the “Observatoire des Inégalités” (French Inequalities Observatory) in 2010, “this apparent equality should not be misinterpreted. The development of service industries over the past few decades has benefitted women whose employment rate has increased significantly. Hence a reduction in female poverty. But the structure, the statutes and conditions of employment remain very unfavourable to them on the whole”

Finally, the family structure can be a decisive factor in the risk of poverty. For example, studies show that within the European Union, the risk of being poor is lower among couples. Single parent families and young single persons are the categories with the highest proportion of poor people. Furthermore, among couples with children, the risk of poverty is highest among large families, especially when the household is comprised of more than three children.

How to measure poverty?

Poverty is a phenomenon that is difficult to pin down. It has even been said that everyone recognises a poor person except for the statisticians! We have seen that, in Europe, and in developed countries more generally, we have a relative conception of poverty. But to measure it, we have to operationalise the definitions.

How to compare the situation of the poorest households with other households? We can measure:
- "Monetary" poverty characterised by insufficient income;
- "Subsistence" poverty characterised by the absence of basic ordinary or consumer goods;
- "Subjective" poverty, i.e. the perception that households have of the comfort in which they live or of the gap between their income and the necessary minimum;
- "Administrative" poverty based on the number of persons who receive social benefits.

Eurostat measures poverty (it discreetly calls it the risk of poverty) by calculating the number of persons living below the income threshold. This threshold stands at 60% of the average available and equivalent average income after social transfers. This measurement is by no means an easy task. Indeed:
- The coefficient (or threshold) of 60% is random, as other coefficients would be, but it is that on which the Member States of the Union have agreed. Eurostat uses other thresholds (40%, 50%, 70%) in addition to this official 60% threshold;
- The use of the average is a debatable option given that the average is sensitive to the high standard of living; however high incomes are today growing faster;
- Equivalence scales: if a household is comprised of a couple with two children, the income is not divided by 4 to calculate the income per consumption unit because it is generally accepted that there are economies of scale, therefore we need an equivalence scale;
- Income: we have to define the income. For example, is it necessary to include the income in kind (imputed rents, domestic productions, etc.)?

Sources: M. Glaude, 1998; Eurostat
As for social exclusion, matters become a little more complex.

This concept is, in fact, based on notions of social participation and integration. It is therefore a more general concept than that of poverty.

Various indicators are at hand to understand the phenomenon of exclusion, including exclusion from the labour market (such as long-term unemployment and insecure employment), health (not only physical but also mental), housing (to isolate the homeless) and education.

This is not the place to go into all these specific aspects and their impact on poverty situations in Europe. We will restrict ourselves to tackling poverty from the point of view of the distribution of income and wealth, a distribution that also has an impact on social inclusion or exclusion, in that it determines how many people are granted the financial means to participate in the activities of society. This begs the question of whether our societies are (more) egalitarian? Whether the trends observed and the policies rolled out at EU level and within the Member States are geared towards reducing inequalities, or, to the contrary, towards increasing it?

To do so, we will look at the evolution of the distribution of income, including of wealth, over the last few decades, and its consequences in terms of social inequalities, poverty, social exclusion and redistribution of income. To conclude, we will put forward the lines of action open to the trade unions.

2. The distribution of income and wealth

2.1 A more unequal distribution of income

One of the main characteristics of our age is that the distribution of income has become more unequal. Inequalities were very marked between the two world wars. After the Second World War and until the early 1980s, inequalities fell sharply, compared with the previous period. We can analyse this reduction as being the result of several factors:

– war, inflation and the Great Depression that saw a downturn in private incomes;
– the wages the accompanied the evolution of productivity (collective bargaining was stronger at the time than today);
– the economic policies that were influenced by Keynesian ideas which valued wages (including social security contributions) as a means of increasing (or stabilising) the aggregate demand;
– progressive taxes (on income and on inheritances) which had an impact on the distribution of income;
– finally, a changed society: we have gone from a society of “persons of independent means” to a society dominated by persons living on the income drawn from their work (with a broader recruitment base given the massive entry of women onto the labour market).
Generally speaking, it can be said that this framework reflects a type of societal compromise, even if it has not always been accepted as such in several countries.

However, this situation was to change at the beginning of the 1980s. Financial globalisation was, in most countries, one of the major factors behind this turnaround (see 2.3). Over the last two decades “more than two thirds of the 85 countries for which the data are available witnessed an increase in income inequality, measured according to the evolution of the Gini index” (ILO, 2008).

2.2 Tension between work and capital in the distribution of income

A fundamental dimension of inequalities touches on the opposition between those who own the means of production (i.e. the capital) and those who, not owning them, must sell their labour power to live. The income of the first comes in the form of profits; the income of the second is those generated by their work, i.e. wages.

This opposition between capital and work tends to be forgotten by certain politicians, a large number of economists and mass social communication. The underlying or explicit idea is that, during a period of economic globalisation and when the unemployment rate is high, it is important not to damage the profitability of companies. The predominant rhetoric is therefore that labour costs must be reduced and that wages must grow less quickly than productivity even without the promised job creations. This is translated by a reduction in the wage share in the distribution of national income.

How does the sharing of added value evolve in developed countries

The wage share in the added value has followed a downward spiral over the last few decades. Historically, there was a reversal of the trend. For a long time, the share of profits and the wage share gravitated around a distribution granting one third of income to capital and two thirds to work. The change took place in the first half of the 1980s and then reached a level that was considered exceptionally low compared with historical standards. This trend is not only observed in the EU but also in other countries such as the United States and Japan.
The components of the wage share European Union 1960-2010

Productivity and wage: base 100 in 1980, left-hand scale. Wage share in %, right-hand scale.

The reduction in the wage share means that the increase in the actual wage is lower than that of productivity. The graph below shows the evolution of the wage share between 1960 and 2010 in the EU (Husson, 2010).

According to Husson, who analyses the distribution of added value in Europe, we are faced with three facts:
- the reduction in the wage share and therefore the increase in the profit share;
- the stagnation of the investment rate;
- the increase in the share of distributed profits.

The reduction in the share of wages in the distribution has been accompanied by growing inequalities inside the payroll with high wages witnessing a faster growth than the other categories of wages. At the bottom of the scale, low wages affect a significant proportion of workers.

**High incomes**
Very high wages concern a growing fraction of the payroll. According to the ILO, the P90/P10 index (a measurement of the 10% best paid compared with the 10% worst paid) has increased in 18 of the 27 countries where these data are available since the beginning of the 1990s. This evolution has even affected the Nordic countries, which are the most egalitarian in Europe.

We also distinguish a growing differentiation inside the group of the 10% best off. The incomes of the 1% that are at the top of the scale (company managers, certain artists and sportsmen, etc.) have soared. Private incomes, drawn from real estate and financial assets, take a predominant place.
Directors of large companies have seen their incomes “rocket”. The wages of the members of the executive boards of the 15 largest companies in 6 countries vary between 71 times the wages of an average employee (Netherlands) and 183 times (United States). And these wages do not take into account the income invested in shares, which means that the differences can be even greater.

The « economic elite » in the United States

What does the American experience of the 1% richest teach us?

- The historical evolution of the incomes monopolised by the 10% richest shows a U curve (graphic). And this growing inequality is almost determined by the evolution of the 1% that make up the economic elite - the share of the other 9% has certainly increased, but to a restricted extent;
- Before the Second World War, 1% monopolised between 15% and 20% of the income (24% in 1928); after the War they fell to less than 15% (9% in the years 1960-1970); before going back up (22.9% in 2006);
- The annual actual growth of incomes was 5.7% for the 1% compared with 1.1% for the other 99% (11% and 0.9% between 2002-2006);
- The evolution over the last decades can be explained by the huge jump in high wages ... and not by the fortunes (wealth), although that could be changing as we speak.

Low wages

Let us now look at the bottom of the salary scale. Low wages – full time workers who earn less than 2/3 of the average wage per annum – concern 15 million workers. However, part-time workers are not included in this figure, despite the fact that there are many part-time workers (especially women) in Europe (75.3% of women in the Netherlands). These two realities must be reconciled. When it is not a personal choice, for many workers part time work means insecure jobs and short-time working. And for all, the prospect of low retirement pensions.
How to measure the capital/work distribution of income?

The simplest way is through aggregates of national accounts: determining the wage share and then dividing it by the national income or the gross domestic product.

Income from work includes all the remunerations of employees, including the social contributions of companies and also, what is much more difficult to understand, the incomes from the activity of the self-employed (according to accounting practice, it is considered that their average income is equal to the average income of employees).

2.3 The role of financial globalisation

How can this evolution be explained? There are different explanations, arising from different theoretical paradigms, which we cannot examine in any detail here.

According to an ILO study (ILO, 2008), different factors determine the reduction in the wage share and they are strongly associated with financial globalisation, such as for example:
  – the high unemployment rate exercises a downward pressure on the wage share;
  – many of the new jobs created in the service industry are of a low quality with low wages. They make up a growing share of total employment with a “structural effect” on the evolution of the wage share;
  – the trade unions sometimes have more difficulties negotiating and collective bargaining is more decentralised;
  – economic globalisation organises the competition of workers at global scale. Offshoring, or sometimes even the fear of offshoring, can be an obstacle to action and reaction by the trade unions.

The pace of financial globalisation increased during the 1990s and exacerbated the trend towards greater inequalities in the distribution of wealth and income.
Globalisation has weakened the power of negotiation of the trade unions and explains, more so than the other factors, the reduction in the wage share, which is due:
– to the management of companies, increasingly intent on satisfying the shareholders of companies rather than on pursuing mid and long-term objectives of sustainable development and the creation/safeguarding of jobs;
– to reorganisations (which almost always lead to job cuts), offshoring and threats of offshoring;
– to the clout of the private investment funds;
– to the power of influence of financial capitalism, often with the complicity of governments and political decision-makers.

2.4 Wealth

More so than an income, wealth is extremely concentrated.
A study conducted by the United Nations University in 2006, which, for the first time gives a measurement of wealth at global level, reveals that 2% of the richest monopolise almost half of the world’s wealth. On the other side of the scale, 1% of the world’s wealth is only held by half of the population.
Global wealth is equivalent to three times the value of the gross domestic product. And there are huge disparities:
– both between countries (North America, Europe and the rich countries of Asia Pacific concentrate 88% of the total);
– but also inside countries. The 10% richest monopolise more than 70% of the total wealth in the United States of America.

Wealth includes the value of physical property and financial securities, minus the debts (see box). The composition of wealth varies from one country to another. Financial assets account for a high percentage of wealth in developed countries (42% in the USA compared with 58% for real estate).

How to measure wealth?
To measure wealth (or assets) we have to have to have an idea of the assets and liabilities. The assets can be movable (such as financial assets: bank deposits, bonds, shares, etc.) or immovable (such as a residence, a durable good, etc.). A debt is a liability. The balance between assets and liabilities represents wealth.

To find out more:
3. Social inequalities

3.1 The scope and evolution of social inequalities

We cannot fight poverty and social exclusion without analysing inequalities within society. There is no doubt about it (see Eurostat, 2010a: 15). Until now, we have spoken of economic inequalities, which is very important but they do not explain everything. We need a broader vision that can integrate problems such as discriminations in the workplace (women, migrants, access to training according to qualifications, etc.), the social inequalities with regard to healthcare (see box), access to information and communication technologies (box), the transmission of the economic capital between generations; etc.

More generally, we can make a distinction between three broad categories of social inequalities (Bihr et Pfefferkorn, 2008: 10-11):

– inequalities in terms of assets, namely in the distribution of material resources;
– inequalities in terms of power, namely in the distribution of social and political resources, in the distribution of power, in the capacity to defend interests and rights, etc.;
– inequalities in terms of knowledge, namely in the distribution of know-how, in the capacity to elaborate knowledge, etc.

One key question is whether the inequalities are on the increase or on the decrease. We must not confound improvement in the standard of living with reductions in inequalities. These are two different matters.

There is no doubt that there has been an increase in living standards (the relationship between the product and population). The problem is whether this process of growth is sustainable in environmental terms. In all cases, it is true that we are living, in a developed world, with conditions that are more favourable than in the past. As regards absolute poverty, the answer depends on the basket of goods under consideration (do we include computers?). In any case, it can be generally accepted that it is falling.

But as we have already seen (point 2.), inequalities in the distribution of income are up and inequalities in general are correlated with this distribution. The degree of correlation depends on factors such as the existence of public services, for example. The situation varies according to countries but, in general, the influence of neoliberal ideas only serves to weaken these services.
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Example 1: Social inequalities with regard to healthcare

Is the biological constitution a major decisive factor in healthcare inequalities? No, we need to take into account social factors such as:

– inequalities of mortality and morbidity between social categories: We know, for example, that managers live longer than employees and workers (differences in life expectancies). Unfortunately, few statistics are available on this subject. There are strong disparities in morbidity (state of health) depending on social environments;

– the impact of working conditions: Work is responsible for almost one in five health conditions. Repetitive work, a generator of musculoskeletal disorders, still concerns more than one non-qualified worker in four;

– the impact of lifestyles: Eating habits and addictions (such as smoking and alcohol) are correlated socially. Obesity is correlated with the standard of living of households;

– unequal recourse to healthcare: A manager or similar consults a specialist twice as often as a non-qualified worker: and consumes 1.9 times more prescription drugs. This is explained by the conjunction of factors such as inequalities of information and monetary costs.

Eurostat has published for some countries, data on the difference in life expectancies between highly educated people and badly educated people. This difference is 7.3 years for women in Bulgaria (life expectancy measured at 30 years) and 2.8 years in Sweden.


Example 2: The digital divide in Europe

Is there a divide between users and non-users of information and communication technologies (ICT) in Europe? Yes:

– the digital divide is above all a question of age and level of education: 88% of young women use the Internet compared with 14% in the 55-74 age bracket; and 87% of persons who have gone on to higher education use the Internet at least once a week compared with 38% for persons without or with a low level of education;

– the rate of penetration of computers and internet remains lower in rural and the sparsely populated areas of the EU.

– the proportion of households with a PC at home is higher among those who have children;

– the rate of use of ICT is up in all categories of society even if a divide remains;

– small companies are trying to catch up with large companies in terms of Internet access.

Source: Eurostat

3.2 Measurement and awareness of inequalities

Our societies are today aware of the need to produce disaggregate statistics according to gender. It is an important evolution and the result of social combats. Trade unions had a major role to play. But one battle remains to be won: the production of statistics that use the nomenclature of the socio-professional categories. And yet, this nomenclature is a powerful tool to better understand the social divides.
The EU has made progress as regards its awareness of poverty and exclusion with the drawing up of indicators (see box in the following point on the Laeken indicators) but the scope of inequalities is vaster.

The existence of information on the Internet, in particular via specialised sites, such as an Observatory of Inequalities in certain countries (France, Portugal, ...) is very useful.

4. Poverty and social exclusion

4.1 Evolution: the reality is dynamic

A few observations

According to the Eurostat concept, in 2008, 17% of the citizens of the EU countries were at-risk-of poverty, which represents 82 million persons. Roughly speaking, contrary to the objective of the Lisbon Strategy of eradicating poverty, there has been no significant reduction – in 1999 the risk of poverty affected 15% of persons.

However, what conclusions can we draw from an examination of the Eurostat figures on poverty (Eurostat, 2010a and Eurostat, 2010b)?

– it is possible to reconcile economic development and growth with a low level of poverty, as is shown by the example of Sweden where the risk of poverty is low (12%). On the other hand, this indicator stands at 19% in the United Kingdom (and again this figure is provisional)
– social security reduces the risk of poverty by 31;
– the unemployed are more affected by poverty (43%). The risk of being poor is 5.4 times higher among the unemployed than among those in employment. Nevertheless, the labour market no longer offers an absolute guarantee, as we will see, against the risk of poverty. In a situation of employment crisis, such as the one we are witnessing today, there is a strong probability of an aggravation of poverty;
Persons with a low level of education are three times more vulnerable than persons with a high level of education. And as has already been mentioned:

- Single parent families are more affected: the risk of poverty is 34%
- The elderly are more vulnerable to poverty (19% for persons over the age of 65), especially women;

**Labour market and poverty**

8% of workers in the EU countries are poor. This contradicts the often widespread idea that it is enough to work to avoid falling into the poverty trap. Workers are considered as poor when they draw a wage that is lower than 60% of the average income of their country of origin.

Eurofound has conducted a study on poor workers (Eurofound, 2010). The concept of poverty is that of the EU. What does it teach us?

- 8% of the EU’s working population are considered as poor in 2007;
- this rate was highest in Greece (but at the time no data was available on Romania and Bulgaria) with the percentage of the poor working population estimated at 14% compared with 12% in Poland. The countries boasting the best results were the Czech Republic (3%), Belgium and Denmark (4%);
- in all countries, the risk of poverty is linked to the level of training and social category: the more qualified the work, the lower the risk of poverty.

**Emergence of new forms of poverty?**

Poverty is a dynamic and not a static reality. What are the trends that can be detected in the field?

The unemployed are a very exposed social group. And yet, the unemployment rate is high and all the inroads made to bring down the unemployment rate over the last few years have evaporated with the economic crisis, followed by the implementation of the austerity plans. The major risk is long-term unemployment. Defending a good unemployment allowance and efficient labour market policies are therefore areas that are fundamental for us.

The financial situation of the elderly has improved over the past two decades even if the poverty rate remains above average. This improvement is a social security success story even if it continues to feel the pressure of the financial markets and the right-wing governments. But the gradual ageing of our societies is bringing us face to face with serious problems, such as for example the growth in the number of dependent elderly persons.

The labour market can be a source of poverty: poor workers and the unemployed. Employment insecurity is increasing the risk of unemployment and can lead to in-work poverty. Young people, especially lowly qualified young people, are very vulnerable: the risk of unemployment is 2.2 times higher, insecurity is high and they generally hold jobs of a low quality. The development of part-time work (18.2% in 2008 and 31.1% for women) also poses problems, in particular when it is not prompted by a personal choice, because part-time jobs means a partial salary and will also mean a partial pension.
Single parent families, a situation that affects women with children in particular, are particularly hit.

Overview of the Laeken indicators

The Laeken European Council (December 2001) adopted eighteen statistical indicators in the field of social inclusion. They cover four dimensions: financial poverty (the best known is the risk of poverty), employment (priority is given to long-term unemployment), health (including life expectancy at birth) and education (including young school dropouts and who do not follow any studies or training).

There are primary indicators, i.e. most important indicators (such as the rate of risk of poverty) and secondary indicators. We can add a third level, which is defined by the Member States, which could include housing.

In-work poverty was recognised in 2003, leading to the definition of the poor worker and resulting in the indicators and variables to be used. We can determine the risk of poverty of workers according to certain characteristics (personal, by households, professional).

The indicators of relative poverty have also been completed by "absolute" indicators of material privation, which cover various dimensions ("economic difficulties", "absence of durable consumer goods" and housing problems).

To find out more:

– Eurostat, the statistics office of the EU, generates statistics on the basis of incomes (SILC survey) (http://epp.eurostat.ec.europa.eu). Data can be consulted on http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/search_database. The « Statistics in focus » are an important means of dissemination because the data are explained in short publications.
5. The redistribution of income or how to reduce poverty and social exclusion, therefore for more social cohesion?

The idea of social cohesion is, to some extent, associated with a fairer distribution (or least more egalitarian) of income. Even if cohesion depends on other factors, such as social justice, it is important to know how to improve the distribution of income.

How to act on the distribution of income by making it fairer? A distinction can be made between two forms of redistribution.

The first is to make the distribution fairer at the source, when actually generating the income, for example, by improving the distribution between capital and work. We can thus act on equality by making society fairer. Let us say that the redistribution of income is done by acting on the causes of the inequalities (primary redistribution).

The second leaves aside the generation of income and will act on the redistribution of income downstream of this generation. We call on tools such as tax redistribution or redistribution via social security or again social transfers.

5.2 Primary redistribution

In the case of direct redistribution, we act on the generation of the income. For example, when the trade unions conduct collective bargaining of wages, they act directly on the distribution of the income between capital and labour.

What is the scope of primary redistribution? Or how to improve the distribution of income at source? There are several means to do so:

- collective bargaining whose importance we have already stressed. While real salaries, i.e. after inflation, increase at the same pace as productivity, the wage share remains the same. That is why the minimum reference standard for the evolution of salaries should be the sum of inflation and productivity. And it should be higher if we want to improve this distribution. We can therefore understand why the right to bargaining is so vital ...
- but we do not only have bargaining right but, in general, it is important to reinforce the influence of the trade unions as a means of reducing the inequality of the market, as is recognised, in black and white, by Paul Krugman in his book *The Conscience of a Liberal*;
- the existence of minimum wages in all countries (whether statutory or contractual) is also another essential means;
- the Social State and the development of public services act on the equality of opportunities, in particular via education;
- the development of measures centred on the labour market, for example, to develop qualifications, to ensure continuous training or to fight against discrimination in the workplace;
Trade unions and the fight against poverty and social exclusion

- *unemployment reduction policies* by developing public investment like public work of social utility (redistribution through demand);

**The minimum wage in the EU countries**

20 of the 27 Member States of the EU have a minimum wage (MW). The amount of this minimum wage lies within a bracket that varies between 1642 euros in Luxembourg to 123 euros in Bulgaria (x 13.3). We can classify the 20 countries into three groups according to the value of the MW. The table presents the countries that are at the higher or lower limits of these three groups.

<table>
<thead>
<tr>
<th>Minimum wages in January 2009</th>
<th>€</th>
<th>% average wage*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Luxembourg</td>
<td>1642</td>
<td>50.5</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1010</td>
<td>38.2</td>
</tr>
<tr>
<td>Spain</td>
<td>728</td>
<td>42.1</td>
</tr>
<tr>
<td>Portugal</td>
<td>525</td>
<td>41.6</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>306</td>
<td>38.1</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>123</td>
<td>42.1</td>
</tr>
</tbody>
</table>

Source: Eurostat ; * in industries and services in 2007

5.2 Redistribution via taxation or social security

The second means of action is to redistribute incomes after its generation.

*Taxes* are not only a means of raising revenues to finance State expenditure. They are also a means of redistributing income. If the income tax is progressive (i.e. if the rate of tax is higher for high incomes) the rich will be taxed more, allowing the State a greater possibility to make effective transfers to the poorest or more broadly to those who need them most.

What are the references available to us in this area?

- tax levels are higher in Europe than in the other regions of the world, but we observe strong disparities from one country to another (see box);
- there is a strong link between high social expenditure and fewer inequalities, as is observed by the ILO. Therefore, the trend towards a relative reduction (as a percentage of the GDP) of this expenditure is worrying;
- however, taxes, dues and social transfers have not stopped the trend towards an increase in inequalities, making the debate on the existence or the reinforcement of progressive taxes even more current and relevant;
- without redistribution processes, poverty levels would be 31% higher;
- today, governments grant greater importance to questions of tax competition than to a fair distribution of income. Taxes on profits have fallen and a few countries have introduced a fixed rate for tax;
- the rates applied to high incomes (marginal rate on the highest incomes) are falling world-wide (the rich tend to pay less taxes).

*Social security* is also a means of redistributing income, even if the redistributive effect can be different or if it depends on the concrete configuration of the
Trade unions and the fight against poverty and social exclusion

social security system. Generally speaking, we can say however that, for example, a highly qualified worker or a manager can contribute more than a non qualified worker and receive less when it comes to unemployment benefit or sickness benefit because their risk is lower and they enjoy better health. There is also redistribution when we allow for minimal benefits (in a few countries the minima are financed by tax transfers).

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**Taxes in the EU**

The level of taxes in the EU stood at 40.9% of GDP in 2007 (we are not taking the example of 2008 because it marked the beginning of the crisis). This rate was 41.6% in 1998. There are broad disparities according to countries. They range from 29.4% in Slovakia to 49.9% in Denmark.

As regards the structure, we see that the taxes on products and imports (such as VAT), on income, and wealth (e.g. taxes on private income) and social contributions (social security) carry a similar weight (1/3 of the total).

The structure of taxes in 2008 (% of GDP)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>40.5</td>
</tr>
<tr>
<td>Tax revenues, including taxes on:</td>
<td>26.9</td>
</tr>
<tr>
<td>Products and imports</td>
<td>13.4</td>
</tr>
<tr>
<td>Income, wealth, etc.</td>
<td>13.1</td>
</tr>
<tr>
<td>Social contributions</td>
<td>12.8</td>
</tr>
</tbody>
</table>

Source : Eurostat, 2010

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**To find out more:**

6. The need for urgent action

Action has already been mentioned in the previous point. But this action is not limited to any particular initiative, it touches on the main aspects mentioned in this guide. As we have already said, trade union action is essential to build a more “cohesive”, fairer society and with a fairer distribution of income. Our action cannot therefore be limited to improving the living and working conditions of the workers that we represent, the employees. It covers broader goals: well being, social justice, social cohesion. This should serve as the framework for the fight for social inclusion and against poverty.

Once these broad objectives have been defined, what are the policy instruments? They can be resumed in the following table, where two levels of objectives overlap – the broad objectives (well-being, social justice, social cohesion) and a second level of objectives – with the instruments and policies, which makes it possible to have a global vision of the challenges.

<table>
<thead>
<tr>
<th>Our objectives</th>
<th>Instruments/policies/targeted population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Well-being</td>
<td>Fairer distribution of income between capital and labour (employees)</td>
</tr>
<tr>
<td>Social justice</td>
<td>Quality jobs (employees also)</td>
</tr>
<tr>
<td>Social cohesion</td>
<td>Social security: for all (population)</td>
</tr>
<tr>
<td></td>
<td>Public services (population)</td>
</tr>
<tr>
<td></td>
<td>Right to a minimum wage and to social inclusion (poor and underprivileged population – including certain workers)</td>
</tr>
<tr>
<td></td>
<td>Redistribution of income (taxes, social security)</td>
</tr>
<tr>
<td>Fairer distribution of income between capital and labour</td>
<td>Collective bargaining</td>
</tr>
<tr>
<td></td>
<td>Minimum wage (statutory or another form including the collective agreements)</td>
</tr>
<tr>
<td></td>
<td>Labour legislation</td>
</tr>
<tr>
<td>Quality employment</td>
<td>Labour policy and action for quality: well-paid jobs, with rights, stability, qualifications, etc.</td>
</tr>
<tr>
<td></td>
<td>Labour and employment legislation</td>
</tr>
<tr>
<td></td>
<td>Collective bargaining</td>
</tr>
<tr>
<td>Social security</td>
<td>Coverage of social risks: unemployment, illness, disabilities, occupational risks, old age, occupational diseases, dependency...</td>
</tr>
<tr>
<td></td>
<td>Replacement income due to the emergences of social risks for workers and persons who have contributed</td>
</tr>
<tr>
<td></td>
<td>Social security guaranteeing the fundamental rights of citizens (non contributory systems)</td>
</tr>
<tr>
<td>Public services</td>
<td>Quality public services (education, health, etc.) for all financed by taxes</td>
</tr>
<tr>
<td>Rights to a minimum wage and social inclusion</td>
<td>Decent minimum income</td>
</tr>
<tr>
<td></td>
<td>Social inclusion: action and measures against discriminations and social exclusions, inclusion in society and in the labour market, positive actions in favour of the most fragile such as the disabled</td>
</tr>
<tr>
<td>Redistribution of income</td>
<td>Progressive taxes: in this way we redistribute the money paid by the richest for the benefit of all (e.g. public services) or of the most underprivileged (e.g. minimum wage).</td>
</tr>
</tbody>
</table>
The minimum wage in Europe

The European Union has reached agreement on a monetary indicator of the risk of poverty. A person who is poor or at-risk-of poverty is considered to be any person who lives with less than 60% of the average income of the country in which they live. On the basis of this indicator, and even after social transfers, the truth is that the rate of risk of poverty in the European Union has not fallen.

For example, this rate stood at 15% in 2000 (EU-15), 16% in 2005 and 17% in 2008, translating as 85 million persons. And, as the Commission recognises, it appears that if there were no social protection systems within the EU – which have played in particular in this period of crisis a role as a “social buffer”, - in other words, if these transfers did not exist, the rate would be close to 30%. Hence the important role played by the social protection systems.

By comparison, if we talk of poverty in the Europe of the 27, the three countries that have the highest percentage of persons in this situation are Greece at 21%, then Latvia at 23% and finally Spain at 20%.

The ultimate aim of social protection is to correct social inequalities and to meet the needs generated by the lack or inadequacy of income. The benefits, whether contributory or not, the various allowances and pensions play a fundamental role, even if they can sometimes have a limited impact to protect against poverty on their own.

Hence the need to devote economically steady means. Indeed, there is a directly proportional link between the poverty index and exclusion and the share of the GDP earmarked for social protection, which means that countries with a low poverty and social exclusion index are those with the strongest social protection systems. Inversely, in the countries that only devote a low percentage of their GDP to social protection expenditure, the poverty thresholds are higher. According to the Eurostat publication *Europe in figures – Eurostat Yearbook 2009*, the countries of the European Union of 27 reduced their social protection expenditure by half in 2005, taking it to 27.2 % of their GDP. The countries that devote the lowest share of their GDP to social protection are Ireland (18.2 %), Spain (20 %) and the countries situated to the east of the Union, such as Poland, Bulgaria and the Czech Republic, Estonia, Latvia, Lithuania, Romania and Slovakia as well as Cyprus. If we take into account these Eurostat statistics relating to the risk of poverty according to age in 2008, we see that in these countries there is also a major risk of poverty but they are however joined by Spain at 20.8 %, the United Kingdom at 20.2 %, followed by Italy at 19.4 % when the poverty average of the EU is 17.4 %.
### Trade unions and the fight against poverty and social exclusion

Percentage of the risk of poverty, per age bracket 2008:

<table>
<thead>
<tr>
<th>Countries/Age</th>
<th>&lt;18 ans</th>
<th>Between 18 and 24 years old</th>
<th>Between 25 and 49 years old</th>
<th>Between 50 and 64 years old</th>
<th>&gt;65 years old</th>
<th>Average (from &gt; to &lt;)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Croatia</td>
<td></td>
<td>25</td>
<td>17</td>
<td>18</td>
<td>25</td>
<td>51</td>
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<td>Turkey</td>
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<td>Switzerland</td>
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<td>15</td>
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<td>Romania</td>
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<td>Greece</td>
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<td>15</td>
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<td>Spain</td>
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<td>United Kingdom</td>
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<td><strong>UE-27</strong></td>
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<td><strong>20</strong></td>
<td><strong>14</strong></td>
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<td>Finland</td>
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<td>26</td>
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<td>11</td>
<td>23</td>
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<tr>
<td>Germany (former GDR included, as from 1991)</td>
<td>15</td>
<td>20</td>
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<td>Belgium</td>
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<td>Norway</td>
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<td>France</td>
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<td>Luxembourg</td>
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<td>Austria</td>
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<td>Netherlands</td>
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<td>Slovakia</td>
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<td>Iceland</td>
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<tr>
<td>CzechRepublic</td>
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<td>13</td>
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<td>8</td>
<td>7</td>
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</tr>
</tbody>
</table>

Source: Eurostat (own elaboration)
1. Definition: What is understood by minimum income within the European Union?

The debate on the introduction of a “minimum income” in the European Union, in particular as an instrument to fight against poverty and social exclusion, is a recurrent debate, which largely exceeds the borders of the Union.

But what are we talking about?

Clarity is of the essence: talking of a European minimum “income” does not mean talking of a European minimum “wage”. It isn’t the same thing and the actors potentially involved are not the same.

The introduction of a minimum “wage” is above all the competence of the social partners and collective bargaining. This means that it can be “interprofessional”, sectoral (per branch), or negotiated at territorial or company level. And in the absence of its introduction by the social partners, it can be decreed by law. We therefore talk of:

- either a contractual minimum wage (introduced by bargaining between the social partners);
- or a statutory minimum wage (imposed by law).

At all events, it is linked to the exercise of a professional activity, in other words it concerns the employees.

When we talk of a minimum “income”, we refer to the entire population and not only the world of employees. It is therefore this income that will be discussed in this teaching manual.

2. What is the reality of the “minimum income” at European level?

Throughout last year, decreed “2010, European Year for Combating Poverty and Social Exclusion” the emphasis was put on the need for all to be able to benefit from a minimum of resources, allowing them to live in dignity. But the European reality is very different.

First of all, all countries have not set up a guarantee of a minimum income (we then talk of social assistance) despite the Council Recommendation (92/441/EEC/) on common criteria concerning sufficient resources and social assistance in social protection systems (24 June 1992) and that stipulated:

“The Council of the European Communities recommends Member States: – to recognize the basic right of a person to sufficient resources and social assistance to live in a manner compatible with human dignity ... and to adapt their social protection systems, as necessary,...” (I.A)

– to organize the implementation of this right according to the following practical guidelines...
Trade unions and the fight against poverty and social exclusion

- every person who does not have access individually or within the household in which he or she lives to sufficient resources is to have access to such right” (B,3)
- The contracting parties ... undertake
- Fixing the amount of resources considered sufficient to cover essential needs with regard to respect for human dignity (C,1.a)
- Establishing arrangements for periodic review of these amounts (C,1e)
- To guarantee these resources and benefits within the framework of social protection arrangements” (C,6,D)

The question is what are the entitlements of those persons who are excluded from the job market or who do not have access to it and/or who do not have their own/personal resources?
At best, a minimum income (France, Germany...) or again “social assistance” (Poland, Romania ...).
When it is a minimum income, it can be known by several names;
For example:
- in Luxembourg it is known as the “guaranteed minimum income” (RMG)
- In France or in Portugal, as a minimum income scheme (RMI) thus establishing a link between the guarantee of income and the desire and efforts of the beneficiary person to work (it should be noted that in France, this RMI is now known as the Active Solidarity Income, RSA)
- In Belgium, we talk since 2002 of an “integration income” (otherwise known as the “minimum subsistence income” or again “minimex”)

But in all cases, the amounts paid out are lower than the poverty threshold, as determined at Union level (60% of the average income of the country in question).
For example in 2008, the amounts were as follows (the first figure indicates the amount of the minimum income and the second, between brackets, the poverty threshold):
- Bulgaria: 22€ (233€)
- Romania: 30 € (159 €)
- Poland: 95€ (326 €)
- Czech Republic: 121€ (143 €)
- Portugal: 187,18 € (480 €)
- Sweden: 343 € (864 €)
- Germany: 359 € (885 €)
- France: 454,63 € (811 €)
- United Kingdom: 645 € (967 €)
- Belgium: 725,79€ (845€)
- Luxembourg: 1 198,67 € (1484 €)

In Italy, there is no national amount, but a different amount according to region, as is the case in Spain (it depends on the autonomous Communities) and in Austria (on the Länder).
According to countries, the amount of this “minimum income” or of this “minimum social assistance” can be different from the “basic pension” (i.e. the retirement pension) paid to those who have not contributed enough, when they reach retirement age.
When it exists, this minimum income is paid out under conditions relating to:
- age (18 years in many countries, but 25 years in Luxembourg and in France, except for particular cases such as the presence of a dependent child);
- Sometimes, the duration of residence in the country in question;
- Nationality, in some cases...

In general, this income is not “portable”. This means that a person who has benefitted from it in their own country, cannot claim to continue to benefit from it if they leave their country to go to live in another Member State. This is because the allocation criteria and the amounts differ from one country to another ...

Finally, this leads us to another ongoing debate in certain spheres or political or associative forums within the European Union, concerning this minimum income. In fact, some advocate replacing it with a “universal allowance” which would, as its name indicates, be paid to everyone, independently of their economic situation and also regardless of whether or not the person is fit to exercise an activity. It would therefore be an alternative to the “minimum income” which is always paid under conditions of resources.

3. The role of the Minimum Income in the fight against poverty (the conditions to be fulfilled)

The guarantee of a minimum income is certainly a necessary condition but, on its own, it is not sufficient to solve the problems of poverty and social exclusion.

Their solution depends on other elements, the first of which is access to employment and quality employment, i.e. a job that is not precarious.

But today, even employment does not protect (no longer protects ?) from the risk of social exclusion and poverty. For example, in the 2008 annual report (so already before the crisis), on social protection and social inclusion, the European Commission recognised that 8% of workers were “poor workers”, in other words, that 17 million workers lived under the poverty threshold and that, furthermore, 31 million were paid a “hunger wage”. In fact, while 6.5 million jobs had been created over the past two years, these jobs were increasingly insecure. For example:
- the number of workers working under a fixed-term contract had increased by 10 million over the past 10 years;
- one fifth of workers were part-time workers, more than 20% because they could not find a full-time job.

In concrete terms, that means:
- 40 million people working full time;
- 39 million people working under a fixed-term contract;
- 29 million “pseudo self-employed”;
- Or 108 million stamped as being in an “insecure situation”, compared with 62 million five years previously.
As fighting against poverty and social exclusion is, as we have just seen:
- Allowing access to long-term employment;
- Allowing access to goods and services (water, electricity, gas, housing, transport...);
- Guaranteeing the right to health and education...

This therefore implies the implementation of holistic policies, a strong political will and financial resources ...

**Under what conditions will a minimum income help reduce poverty?**

For the ETUC, this condition is twofold:
- The first condition, which, as we have seen, is far from being fulfilled today, is that it must be adequate, i.e. above the monetary poverty threshold (60% of the average income);
- The second condition is that the income must be effectively a “right” throughout the European Union. The best means of doing so is to apply a binding instrument such as a “Directive” given that, as experience has shown, “Recommendations” or “Codes of good conduct” are inefficient in this matter.

The problem is that, today, no majority has emerged either within the Council or the Parliament in favour of the introduction of such an instrument. For example, the European Parliament, meeting in a plenary session on the 19th of October 2010, rejected a Resolution calling for the introduction of a framework directive on this subject by 344 votes against 262 even if it should be noted that the number of Members of Parliament in favour of this directive is no longer negligible.

4. The points under discussion

As we have seen, the first point under discussion relates to this notion of “right” to a “decent” minimum income.

But this question is linked to another that concerns its “funding”.

In fact, today more than ever, to reassure the financial markets, the Member States are taking drastic measures to reduce their budget deficit and to do so, have no qualms in making big cuts to their social budgets, even in interfering in collective negotiations to ban any automatic indexation of salaries, or even any increase. As Mr. TRICHET the Governor of the European Central Bank put it in February 2011 “Raising wages today would be stupid”!!

However, with the crisis, the situation has worsened and it is essentially households, and among them, those who were already the most vulnerable, or again the pensioners, who are “paying the price”.

As an illustration:
- Between August and October 2008, the number of unemployed in the United Kingdom increased by 137,000, 40% of them young people;
- in Ireland, unemployment, which had been below 5% since 2001, rose to
7.8% in November of this same year. At the same time: public pay was cut by 5 to 15%, social benefits were reduced, including for the unemployed, a tax was levied on water (free to date) and taxes were increased (except on company profits: 12.5%) ;

– in Spain: 2007, unemployment rate of 8%, end of 2008: 12.5%, today: 20%. But public sector appointments were frozen and public sector pay cuts announced (-5%), the retirement age and VAT were put up...

– Latvia, end 2008: public sector pay was cut by 15%, pensions were frozen and VAT increased...

– Portugal, despite the creation of a new tax bracket of 45% for incomes > 150,000€, and taxation of 20% of the stock market profits, public sector pay was frozen for 4 years, a certain number of allowances were abolished altogether and a privatisation plan introduced in transport, energy, insurance, postal services ...

– Luxembourg announced a freeze on public wages over the next 3 years and an increase in taxes,

– etc.

And at the same time, banks returned to their pre-crisis remuneration and bonus practices.
And we are seeing this paradoxical situation whereby, today, even more than yesterday, the rich are becoming richer and the poor are becoming poorer.

In addition to the budgetary aspect, this debate on the financing of the minimum income relaunches the more general debate on the financing of social protection, which is excessively dependent today on the income from work, whereas other sources of revenue and wealth escape this funding.
And, contrary to those who claim “that there is no/no more money” to finance the social measures, or to introduce a minimum income, the resources exist on the condition that those responsible have the political will to look for them and implement the necessary political means.

This prompted the ETUC, during the meeting of its Executive Committee on the 9th and 20th of March 2010, to formulate several proposals along these lines.

For example, the ETUC advocates a tax on financial transactions. The first advance of this tax would be to make certain financial transactions more expensive and therefore less interesting, thus contributing to stabilising the price of the shares and raw materials and the exchange rates. The speculative operations would be those worse affected, the short-term investors paying higher taxes due to the higher frequency of their transactions. Furthermore, the profits of this tax would help cover the costs generated by the crisis.

Another avenue to find new sources of funding that do not weigh on those who already have the least would be to apply a balance sheet levy to the debts of the banks (with the exception of deposits, as these are covered by an explicit guarantee system subject to the payment of costs). For the ETUC, this would be a logical and fair measure, as the guaranteed “rescue package” granted to the banks would no longer be “free” and they would participate thus in the general costs of the crisis that they have inflicted on the economy.
Finally, a third avenue is further put forward by the ETUC. This entails taxing the bonuses of the banks, the dividends and the share options. In fact, the banks can no longer continue to pay bonuses and dividends using public subsidies whereas, at the same time, the entire economy, including the governments, must pay the price for the crisis caused initially by the banks. Social aid must not be replaced by “aid to the banking sector”.

Another point under discussion is that of the relationship between the introduction of a minimum income and the other social minima, including the minimum wage. Some entrepreneurs or politicians are coming out with the well-worn rhetoric that high social benefits would dissuade the unemployed from taking up work.

First of all, it is a completely gratuitous and unproven claim, that is one of the many myths perpetuated by the well-off or those who have never experienced poverty! If we take for example a country such as Denmark, where the social system can be considered as very generous compared with the situation prevailing in other countries, we see that despite this “social generosity”, this country has one of the highest employment rates in the Union.

On the other hand, what is dissuasive to employment are salaries that are so low or working conditions that are so precarious or so poor that they discourage their beneficiaries from participating in the labour market. It is in such cases, when the benefits drawn from this participation are not that different to the amount of the social benefits, that we can talk of “poverty traps” or “job traps”.

The answer does not lie in reducing social benefits but in increasing the quality of jobs and wages, so that individuals are not put off working. Furthermore, this participation in a quality labour market will have positive impacts on the funding of social protection as their beneficiaries:
– will no longer need to have recourse to assistance incomes or social benefits;
– but to the contrary, through the contributions drawn from their work, will participate in the funding of their own social protection.

5. Position of the ETUC and trade union strategies

The ETUC has always believed that its action in favour of quality jobs and wages is inextricably linked to its fight against poverty and social exclusion, both being, in its mind, interconnected.

Therefore, during the meeting of its Executive Committee on the 1st and 2nd of December 2009, the ETUC denounced the priority given to economic factors, which has resulted, in the name of so-called European competitiveness, in a decline in quality employment within the Union over the past ten years or so. It underlined that the clear cuts made in the social budgets of the Member States were leading to reductions in social benefits. A situation aggravated
by the pressure put by the Commission, along with other international authorities (IMF, OECD), on a certain urgent need to reduce the budget deficits, whereas they could allow certain States to “turn the corner”.

For the ETUC, a strategy of fighting against poverty, to provide those who need it with a guaranteed and a decent income and access to quality healthcare and social services, is incompatible with the continued tax cutting policies carried out within the Member States and in particular those in favour of companies. These cuts take the form of exonerations from contributions and taxes without real counterparties in the field of job creation, creating above all windfalls for the companies that benefit from them, without real or long-term effects on jobs (creation and/or maintenance).

The ETUC therefore pleads in favour of a strong mobilisation and a determined commitment of its members to fight against poverty, conducted simultaneously in two areas: social protection and employment.

In fact, fighting against poverty not only means coming up with remedies, but also taking action upstream by reinforcing and improving the social protection systems. The first step is to “rehabilitate” social protection as an economic agent as it is not only a source of expenditure – even if social – but a “productive investment”.

For example, the social protection systems must guarantee their beneficiaries “adequate” incomes, to take up the terminology of the Union, or “decent” incomes to use that of the ILO, whatever the ups and downs of their professional life. In doing so, as already underlined, they turn these beneficiaries into “contributors”.

Developing a good health policy, notably through prevention and access to quality care for all, means, in the long-run, substantially reducing healthcare expenditure.

By providing for persons in need of long-term care, in particular by developing care facilities and provisions and home assistance, new jobs can be created. The same goes for the development of childcare facilities for young children, also allowing the parents concerned to achieve a better life-work balance.

Guaranteeing periods of professional transition to those who lose their jobs, in particular by securing their revenue, means allowing them to enter into an active procedure to look for a new job.

However, social protection cannot be limited to playing the role of the “ambulance” of a system in a crisis, therefore only coming to the help of the poorest or those who are at-risk-of poverty, as we know that often “policies for the poor prove to be poor policies !”

The social protection systems have a universal role to play and should ensure the well-being of all. This role is illustrated by their redistributive function – via the benefits paid or the services rendered.
Thus, by taking on this role, not only can social protection systems prevent the risk of poverty, but can contribute to the creation of social well-being, which is also one of their basic vocations. By thus restoring social ties, they help build a more cohesive society and allow each and every one of us to be a “social” player, to occupy our proper place and to be a stakeholder in society.

Certainly, and as already underlined above, the social protection systems play the role of “buffers of the effects of the crisis”. Hence the need for them to have the means to fulfil this function. In other words, they must have access to perennial and sufficient financial resources.

But social protection not only covers healthcare services, but also social services. They must have the legal security and the economic guarantees to be able to allow Europeans, especially those that need them most, to enjoy and exercise their fundamental social rights (income, health, education, housing, retirement). In other words, as far as the social protection systems and services of general interest are concerned, fighting against poverty means:
- guaranteeing a decent wage for all, regardless of their social, professional, personal situation ;
- developing high quality social and health services, accessible to all and financially affordable.

**Fighting against poverty is also, at the same time, acting upstream on the quality of employment and wages.**

The quality of employment and wages, which is a constant in the mobilisation of the ETUC, is not only the gauge, for the European economy in particular, of a better efficacy, but it is also a guarantee of a decent wage for workers and for those who are not or no longer on the job market and at the same time the best protection against poverty.

An « Eurobarometer » survey carried out in September 2009, revealed:
- on the one hand, that European citizens are fully aware of the problem of poverty and social exclusion that affects society today (73%, or almost three in every four Europeans believe that poverty is widespread in their country, even if this result must be modulated according to countries) ;
- on the other hand, that for more than half of Europeans (56%), the unemployed represent the group most exposed to poverty, as well as persons facing employment insecurity (31%). 41%, on the other hand, believe that the elderly are the most vulnerable, in particular when you consider that a poor worker will inevitably be a poor pensioner. In return, this survey also reveals that, for 74% of those surveyed, poverty compromises the chances of finding a job.

For the ETUC, the interaction between employment, wages and poverty is essential and justifies the mobilisation and determined action in this field.

The strategy and mobilisation of the ETUC and of its organisations must be hinged around 4 axes that are intimately linked and interdependent:
- the guarantee of and right to a decent income, for all ;
- the development of social standards ;
- access to high-quality social services ;
- access to employment, in particular for the disabled.
For the ETUC, the ultimate goal is social cohesion and a blanket coverage for all citizens in a situation of inequality and social exclusion in the different countries.

To do so, we believe that it is vital to take action at European level to introduce a guaranteed minimum income in each of the Member States with common characteristics:

- **objectives:** payment of an economic benefit on a periodical basis (monthly) to persons without sufficient economic resources to satisfy the basic needs necessary in order to live a dignified life.
- **goal:** it should be possible to complete this minimum income with actions in the field of social services, health, education, adult training and support actions for social integration and/or employment.
- **nature:** this benefit must be subjective, should not be dependent on the existence of budgetary resources. In other words, it should be possible to oblige Member States to generate the necessary resources dedicated to the payment of this benefit.
- **amount:** its amount should in all cases be higher than the poverty threshold, to be able to achieve its objective, namely to remove its beneficiaries from the risk of poverty. This implies, as has already been evoked, reviewing the other minima, such as the minimum wage.

Short conclusion of the role of the minimum insertion incomes:

- need to claim in all Member States the introduction of these incomes as a subjective right, with a guarantee of equality, efficiency and sufficiency, completed by access to benefits and services, capable of meeting the needs of the population, contributing a better social and territorial cohesion;
- effectiveness of minimum incomes as an instrument for social insertion, but also in employment;
- an increase in economic resources in the budgetary sectors is fundamental to be able to satisfy this type of benefit.

**Bibliography:**

- Comparative table: The minimum wage in a few countries (in annex at the end of the chapter: starting with Horusitzzy et allii, 2006: http://www.sante-sports.gouv.fr/IMG/pdf/er464.pdfn ) and updated on the basis of the MISSOC data
- Recommendation 92/441/EEC.
The quality of Social Protection

1. Concepts and definitions

The notion of social protection first and foremost covers the “Social Security” provisions set up within each Member State and that set out to protect individuals against the consequences of certain events such as the birth/adoption of a child, the loss of a job, illness, invalidity, handicap, an industrial accident, old age or the loss of a spouse.

But this notion of “social protection” targets more broadly both the “supplementary” social security benefits such as “social allowances” but also the “services” allowing individuals to become part of society, to be “included”, such as housing, education, transport, social services and long-term care, etc.

At the same time, social protection plays a preventive role against phenomena such as poverty or social exclusion, even if it is also a tool of redistribution and solidarity.

A result of historical, geopolitical and social evolutions, social protection, and Social Security in particular, is characterised by a very diverse variety of systems whose methods of organisation and financing are the responsibility of the Member States:

– it can be built on a social insurance model (Bismarckian model) i.e. linked to the professional activity and mainly financed by social contributions or on a model of universal cover (Beveridigian model) that is founded rather on the criterion of residency and whose financing comes, mainly, from general resources (tax) ; it can also be a combination of these two models ;

– it can be exclusively public in nature or complemented by private systems (see supplementary pensions, private health insurance schemes, occupational accident insurance, etc.) ;

– it can be organised on a centralised or non centralised basis ;

– it can be exclusively managed by public bodies just as it is possible for certain missions to be entrusted to private third parties, such as mutual societies, for example.

Whatever the characteristics of organisation and operation, its scope of action covers, as far as Social Security specifically is concerned, in its strictest sense, and in accordance with Convention 102 of the ILO that serves as a reference and that the Member States have ratified in turn, the following fields :

– the payment of income replacement allowances (in the case of maternity, illness, invalidity, industrial accidents or occupational disease) ;

– the organisation of healthcare ;
– the payment of family benefits;
– the protection of maternity;
– death.

In addition to these traditional fields of Social Security, other perspectives emerge, in particular to allow the coverage of long-term care or a better work-life balance.

1.1 Income replacement allowances

The social allowances designed to pay a replacement income during a period of unemployment, after retirement, in the event of illness or because of a handicap, play a preponderant role in social protection systems. They set out to guarantee a stable and adequate income when these social risks arise and, as such, play an important role of securitisation, both from the point of view of individuals and society in general. They must not be considered as a charge but as a productive investment from which everyone can benefit.

The radical upheavals suffered by European economies and societies in the wake of globalisation, technological changes, the onset of the phenomenon of population ageing and, more recently, of the economic crisis in 2008, have moved the goalposts for social protection systems in general and income replacement allowances in particular. The so-called modernisation policies conducted over the past twenty years set out mainly to consolidate the public finances of the various Member States – often to the detriment of the quality of social protection, by making drastic cuts in social budgets, all in the name of «budgetary orthodoxy», which considerably reduces its policy options - while claiming to secure economic growth, in particular via high employment rates, without however being sufficiently attentive to the «quality» of these jobs. We will now review these different replacement incomes.

1.1.1 Unemployment insurance

Unemployment insurance is an essential social advantage as it sets out to provide every worker with a safety net to protect against the consequences of redundancy or a reorganisation. It is designed to ensure an adequate and stable level of resources, which is the prerequisite for the securitisation of professional mobility and, at the same time, of a return to employment.

Since the emergence in the 1990s of the so-called “active” policies, unemployment insurance is not limited to the payment of allowances but is combined with measures to support quality jobs. These so-called activation policies were designed, notably, to guarantee personalised support as well as access to qualifying training courses. However, the truth is that these so-called activation policies are increasingly pushing the unemployed to “actively” search for a job and consequently to accept any job offered to them, as their entitlement to allowances is increasingly subject to accepting anything that comes along.
1.1.2 The retirement and widows' pensions
The retirement pension is the allowance paid once all professional activity has ceased, according to the social security system set up in each of the Member States. Hence:

– in the « Bismarckian » model of social insurance, the amount of the retirement pension depends on the contributions paid during the career, and therefore on the wages drawn. Certain Member States, but not all, have however set up minimum pensions, on the one hand, for those who have contributed all their life but whose wages were not very high and whose careers were interrupted due to illness or unemployment, for example, known as “minimum contributions” and, on the other hand, minimum pensions, often close to the guaranteed minimum income, when it exists, for those who have never contributed;

– In the « Beveridgian » model, the pension is universal and uniform for all (therefore independent of the wage earned), on the sole condition that the recipient resides “legally” in the country at the time the pension is paid. To avoid abuse, however, in some cases, it is only paid subject to a minimum period of residency in the country in question, and, if this prior condition is fulfilled, its amount can be proportional to the effective duration of residence.

The retirement pension can, in some cases, be increased in accordance with the number of children (cf. French system of “credit for three or more children”) or according to the situation of the household if the spouse does not draw an income or a sufficient income. This advantage can be transferred to the surviving spouse at the death of the beneficiary. This is then known as a widows’ or “survivor’s” pension.

All these pension schemes funded by Social Security, still known as “statutory pensions” or “public pensions” do however have a common denominator as far as their method of financing is concerned; they are based on “distribution”. This means, to put it simply, the contributions of employees in work serve to fund the pensions of those in retirement. These contributions are “distributed” among the pensioners. This payment therefore does not depend on the financial markets but on the “contributing” capacity of the employees, and therefore on their rate of employment and the quality of their employment.

In most countries, the public pension schemes represent the main source of income at the time of retirement. In these conditions, it is indispensable that everything is done to ensure their long-term future and financial viability.

These systems are based on the principle of solidarity and forge inter and intra generational links that help secure social cohesion. They also make it possible to secure pension rights during periods of unemployment and when careers are interrupted due to illness or to look after the family. Their financial stability showed its worth during the financial crisis of 2008.

In addition to these public pension schemes, supplementary pension schemes have emerged. They can be managed either by insurance companies or by bodies dedicated to the management of retirement contributions, known as “pension funds”.

These supplementary schemes are still known in the European jargon as “occupational pension schemes” when they are taken out within the framework of an employment relationship. They can be set up:

– through collective agreements or company agreements and in this case, the contribution is generally shared between the company (employers) and the employees;

– or paid by the company to the profit of certain categories of staff, generally the managers and directors, and in this case, it is often the company alone that provides the funding;

– or proposed to the staff, without any automatic obligation for the company to participate in its funding;

– or subscribed individually by the employees therefore without the involvement of the company.

The “yield” of these supplementary schemes, therefore in the long-term the amount of the pension paid out, depends on the financial performance of the investments of the contributions paid. In fact, these schemes are driven only by the financial market. That is why, over the past few years, according to the type of investment made, these schemes have felt the pinch of the financial crisis. These supplementary pensions can be broken down into two types:

– the “defined contributions” schemes, which are nothing more than “savings” systems ahead of retirement, are financed by contributions, the amount of which corresponds to a sum, or to a percentage of the wage of the worker, determined, or defined, in the contract (hence the name “defined contributions”). There is no commitment with regard to the amount of the pension that will be paid out in this case. These are the most widespread systems today. The contributors are those who carry the risk of the investments made on their behalf by the management bodies. The benefits therefore depend on the return on investment of the contributions (unless legislation provides expressly for minimum yield levels). Generally, the funds collected are managed by insurance companies or supplementary pension bodies. When taking retirement, it is up to the pensioners whether they want to transform the accumulated capital into:

– either a life annuity (i.e. paid throughout the retirement period), which is usually the preferred option and whose amount depends on the actuarial “life expectancy”, i.e. calculated in particular in accordance with the gender of the person concerned – and in this case, women generally receive, for the same accumulated capital, a lower annuity than men as their life expectancy is “theoretically” longer – but also on the socioprofessional category (worker, employee, manager, etc.) to which the contributor has belonged and that also influences the life expectancy at retirement (7 years’ life expectancy less for a worker compared with a senior manager).

– or the payment of the accumulated capital;

– or a combination between the two formulae (realisation/payment of a part of the capital and the remainder transformed into a life annuity).

– the “defined benefits” schemes, under which workers benefit from a pre-defined pension level, generally corresponding to a certain percentage of the wage per contribution year or year worked. Under this type of scheme, a commitment is made by the company (by the employer), requiring it to adopt
measures to respect the commitments/promises made. In other words, the funds built up, we say “accumulated”, in the course of the career of the employees concerned must be sufficient to subsequently pay out this benefit. Furthermore, the manager must always be in a position to honour its commitment. The funds thus set up can either be managed within the company, it is said that they are “included in the balance sheet”, or entrusted to a company dedicated exclusively to this management that is called a “pension fund”6. Contrary to the “defined contributions” schemes, where the risk is carried by the contributor, in the “defined benefits” schemes, the employer carries the risks. We can easily understand that, in the name of the claimed “empowerment” of the employees, employers have a tendency to evade this responsibility and to develop more “defined contributions” schemes.

1.1.3 Incapacity for work or handicap

In addition to unemployment and pension, the third category of income replacement allowances concerns the allowances received in the event of incapacity for work, handicap, industrial accident or occupational disease. Ideally, these allowances should not only make it possible to keep up an adequate standard of living but also cover the specific expenditure to which the person is exposed due to their illness or handicap. The policies that set out to guarantee accessible and quality healthcare here have an essential role to play, as do those that encourage the development of social infrastructures and services provided in situations of dependency in order to guarantee a dignified life (cf. care and home help services, assistance from third parties, etc.).

Incapacity for work and handicap not only raises the question of the allocation of an adequate substitution/replacement income but also that of the return to or access to employment when the physical and mental state of health allows. While an income is an indispensable condition to be able to live independently, it is not forcibly a sufficient condition. In many cases, the integration of the persons concerned into professional life should also be given due consideration.

1.2 Healthcare and long-term care

Being in good health is vital to ensure quality of life. Access to quality healthcare should therefore be guaranteed and not depend on financial means. The importance of healthcare is demonstrated by the budget that it represents (29.1% of total benefit expenditure on average in the EU of 27 for 20077) making it, after pensions, the second social protection budget in terms of size within the Member States.

6. This means that the term “pension fund” covers two realities. It initially referred to the body in charge of managing the funds accumulated/built up in the “defined benefits” schemes before also designating this type of scheme. Setting up a “pension fund” means in the strictest sense of the term setting up a “defined benefits” scheme. Misleadingly (and/or because it has become a buzzword) this term is incorrectly used today to also designate the “defined contributions” schemes, which often adds a certain confusion when we talk of private supplementary schemes: what is the exact scheme in question?

7. Source Eurostat
The notion of healthcare is clearly very vast as it covers both outpatient care (general and specialised medicine, radiology, dentistry, physiotherapy, etc.) and hospital care, but also the drugs policy. The scope of this sector depends on sociogeographical factors (cf. geographical distribution of the available care, different consumption profiles according to regions or categories of population), demographic factors (ageing) and technological factors (development of new treatments).

Long-term care, for its part, covers spending on extreme dependence and includes rehabilitation, basic medical treatment, home care, social assistance, housing and services such as transport, the delivery of meals, professional assistance and assistance with day-to-day tasks. This care is generally provided to persons suffering from physical or mental handicaps, to vulnerable persons, to the elderly and persons who cannot carry out their day-to-day tasks alone. Long-term care is more widespread in the older population bracket, which is more exposed to the risk of prolonged chronic diseases that generate physical and/or mental handicaps. Because of extended life expectancy, the demand for long-term care is set to grow and this, whether in terms of home care or care in an institution.

1.3 Family benefits

Family benefits are allowances paid to cover costs linked to the birth and education of a child. They can also be paid to:
- cover the loss of income brought about by a reduction in the professional activity of one or two of the parents to devote themselves to the education of their child/children;
- financially reward having children (conservative approach that is reflected in the granting of higher advantages to large families);
- cover the cost of childcare via a direct payment (reimbursement) or indirect payment (financing of structures);
- take into account the specific situation of the family (cf. single parent families) or of the child (orphans or the disabled).

1.4 The protection of maternity

Since 1992, an EU Directive exists that sets out to promote the improvement of the security and health of working women during pregnancy, after childbirth or breastfeeding in the workplace. This Directive is hinged around two aspects. The first concerns well-being in the workplace and sets out to protect the worker against the risks incurred by their position or working environment. The protection against risks can lead to an adjustment of working conditions or working time, or to an interruption of work. The second sets out to guarantee rights to

female workers: right to maternity leave of at least fourteen continuous weeks, dispensation from work to go to prenatal medical examinations, protection against unfair dismissal, full pay or granting of an adequate income replacement allocation. On the 20th of October 2010, the European Parliament decided to increase paid maternity leave to 20 weeks within the Union. However, during the Employment and Social Affairs Council of 6 December 2010, several governmental representatives expressed their deepest reserves, even their opposition, with regard to this lengthening of this period. Today, the ball is in the court of the Council and, more precisely, of the Hungarian Presidency.

1.5 Work-life balance

Finding the right work-life balance plays an undeniable role in quality of life and social cohesion. The measures implemented in this area are also tools that are indispensable for a “desegregation” of the labour market, as they can lead to a better participation of women and older workers on the labour market.

Parallel to the measures adopted within the framework of labour relations, social protection can play a role in supporting an organisation of work and career that is better adapted to leisure times. This involves, for example, setting up accessible and quality childcare services and introducing specific leaves that allow the worker, whether male or female, to partially or completely suspend their professional activity in order to provide care to close family members for example. To ensure the fairness and success of these measures, beneficiaries should be guaranteed a full wage during these periods of absence and their pension contributions should be maintained.

The framework agreement concluded within the framework of the social dialogue of 18 June 2009 has just been given legal effect by a new Directive on parental leave. It increases from three to four months the minimum duration of parental leave for each parent. The Directive stipulates that at least one of these four months is non-transferable from one parent to another in order to encourage fathers to use this leave. The methods of application must be adopted within two years and are defined by the Member States and/or the social partners.

2. The reality in Europe

Although social protection is an exclusive competence of the Member States, it is still at the heart of the European project, as demonstrated by article 9 of the Treaty on the Functioning of the European Union (TFEU): “In defining and implementing its policies and activities, the Union shall take into account requirements linked to the promotion of a high level of employment, the guarantee of adequate social protection, the fight against social exclusion, and a high level of education, training and protection of human health.”.

10. (OJ C115 of 09.05.2008).
Article 34 of the Charter of Fundamental Rights further recognises its importance when it specifies that the Union recognises and respects, in accordance with the procedures laid down by Community law and national laws and practices:

– on the one hand, the entitlement to social security benefits and social services providing protection in cases such as maternity, illness, industrial accidents, dependency or old age, and in the case of loss of employment;
– on the other hand, the right to social and housing assistance so as to ensure a decent existence for all those who lack sufficient resources.

While the Union can only adopt regulatory provisions in the field of social security via a unanimous procedure (article 153 TFEU), it can however take initiatives to ensure the coordination of the social policies of the Member States (article 5 TFEU).

This coordination power took concrete shape in the early days of European construction (at the time, the Common Market) through the adoption of the Council Regulation on the application of social security schemes, Regulation 1408/71, an ancestor of the current Regulation 883/2004 and its Implementing Regulation 987/2009, setting out to guarantee acquired rights in the field of Social Security to migrant workers who are members of the Union, i.e. who move between the Member States. These provisions apply also and therefore have been extended, since the 27th of November 2010 (i.e. 3 days after its publication in the Official Journal of the Union on 24 November), “to nationals of third countries ... as well as to members of their families and their survivors, provided that they are legally resident in the territory of a Member State...” (Regulation 1231/2010).

Furthermore, for around ten years now, provisions have been set up in order to reinforce cooperation in the field of social protection via an Open Method of Coordination (OMC) social protection and the creation of a Social Protection Committee (SPC).

2.1 The coordination of the national systems

Article 48 of the TFEU stipulates that “The European Parliament and the Council shall, acting in accordance with the ordinary legislative procedure, adopt such measures in the field of social security as are necessary to provide freedom of movement for workers.” As has just been said, from the outset, Europe has made efforts to preserve the Social Security rights of migrant workers and their families. The various provisions taken then were codified in 1971 in the “coordination” regulation so that the various social security systems applied in the Member States cannot be an obstacle to the free move-

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ment of workers. As also mentioned above, this Regulation was updated by a new Regulation\(^{13}\) that entered into application on the 1st of May 2010. It concerns the public social security systems.

For the supplementary pension schemes, and still with the aim of the free movement of workers, a Directive relating to the safeguarding of entitlement to the supplementary pension of employed and self-employed workers moving within the Community\(^{14}\) was adopted in 1998.

Along the same lines, in 2005 the Commission submitted a proposal for a Directive on the portability of supplementary pension rights for workers moving within the Union. Following the opposition expressed within the Council, the Parliament but also, if not above all, among the insurers who manage the funds of these pension schemes, the Commission was obliged to reformulate its proposal in 2007, watering it down and removing all reference to the “portability of rights”. But to no success as far as its adoption was concerned. Since then, the proposal is still pending …

The Pensions Forum was created on the 9th of July 2001. This consultative organ comprised of experts sent by national governments, social partners and supplementary schemes deliver opinions on supplementary pension schemes. It is chaired by the Commission, deputised by the ETUC and BusinessEurope (European employers).

2.2 The social protection OMC and the Social Protection Committee

In 2000, the major goal pursued by the Lisbon strategy was to reinforce social cohesion and the fight against social exclusion. In this context, it gave birth to the concept of the Open Method of Coordination (OMC). The OMC is a voluntary political cooperation process based on the setting of common objectives and indicators designed to measure the progress made towards these objectives. The governments translate the joint objectives into action plans presented in the form of national strategic reports. The drawing up of these National Action Plans must be (should have been) done in consultation with all the parties concerned, the first of which are, clearly the social partners and in particular the trade union organisations. These reports are evaluated by the Commission and the Council, within the framework of joint reports that analyse the results obtained in the various Member States. The Open Method
of Coordination is also designed to allow mutual learning with regard to the in-depth examination of the institutional policies, programmes and measures presented as being “good practices” in the national reports.

The OMC was originally applied to the European Strategy for Employment before being extended to social protection. The social protection OMC relating initially to four fields, including that of “making work pay” was quickly limited to three areas: social inclusion, pensions, healthcare and long-term care. This means that it does not currently pay any particular attention to the other unemployment, invalidity, industrial accident or occupational diseases replacement allowances or to the family benefits, to the protection of maternity or work-life balance. Furthermore, we need to point out that the social protection OMC does not comprise any detailed quantitative or qualitative objectives, contrary to the strategy for employment. The absence of objectives that are as “clear” as those of the employment rates undermines the impact of this instrument, which increasingly tends to be limited, with the generally tacit consent of the Member States, to the drawing up of reports and “exchanges of good practices”. The Social Protection Committee, just like the ETUC or other European bodies, has already called for a reinforcement of this OMC but without concrete result to date.

The Social Protection Committee was officially created in 2004 to operate alongside two other pre-existing Consultative Committees (the Employment Committee and the Economic Policy Committee). It is comprised of two representatives designated by each Member State and two representatives of the Commission. Its existence and its missions are confirmed by article 160 of the TFEU:

– to monitor the social situation and the development of social protection policies in the Member States and the Union;
– to promote exchanges of information, experience and good practice between Member States and with the Commission;
– to prepare reports, formulate opinions and undertake other work within its field of competence, at the request of the Council or the Commission, or on its own initiative;

These missions are accomplished within the framework of “appropriate” contacts with management and labour.

The interest of creating this Social Protection Committee lies in the fact that, contrary to previous practices where the issues relating to social protection were only examined in forums dealing with economic and financial questions, they are today examined by social affairs forums. The economic and financial policymakers of the Member States are not however ejected from the debate, as the reports that the SPC must submit to the Council must be drawn up jointly with the Economic and Financial Policy Committee.

The role of Social Protection in the fight against exclusion and poverty.

As already mentioned in the introductory text to this manual, the phenomenon of poverty can be put down to several factors. Among them, available income plays a preponderant role, as demonstrated by one of the two main poverty indicators: the risk of poverty that refers to a threshold of 60% of the average income\(^\text{16}\).

The main aim of social protection is not to fight against poverty but to ensure adequate social protection when certain events arise. However, it makes it possible to significantly stem the consequences of a loss of income. Eurostat estimates that, in 2008, social transfers, outside pensions, made it possible to reduce the risk of poverty by 32% on average in the 27 Member States of the EU\(^\text{17}\). To study this reduction in the rate of risk of poverty, we compare the income of households before and after social transfers. Please note, as a reminder, this indicator does not unfortunately take into account pensions that are considered as a professional income. We can thus evaluate the number of persons who would fall under the poverty threshold (60% of the average income) without these social transfers. The global result therefore shows that, in this case, 25% instead of 17% of the total population of the 27 Member States of the Union would be exposed to the risk of poverty, i.e. 32% more. There are also clearly broad disparities between Member States. For example, social transfers bring about a 50% reduction or more in the risk of poverty in Hungary, in the Nordic countries (Sweden, Norway, Denmark and Finland), in the Czech Republic, Ireland and Austria. Inversely, these transfers only succeed in reducing this risk by 20% in Greece, Latvia, Spain and Italy.

As underlined in the introduction, despite the existence of highly-developed social protection systems, most of the Member States are faced with unacceptable levels of poverty and social exclusion. The best means of escaping from exclusion is certainly to access a sustainable, quality and well-paid job. For example, in 2008\(^\text{18}\), the risk of poverty affected 8% of the working population (5% of workers under an open-ended contract and 13% of workers under fixed term contracts) but reached 44% for the category of the unemployed and 27% for the other non-working population. Similarly, the rate of the risk of poverty remains particularly high among people over the age of 65 (20% on average in the 27 countries of the Union compared with 17% for the population as a whole) and this, particularly for women (for whom this rate reaches 22%). This raises the question of how to match the level of the replacement allowances to the income received by the rest of the population. Hence the overriding need for a quality social protection that pays out adequate social allowances.

However, as we have said above, the fight against poverty must be considered from more than one angle and cannot be limited to compensation. The meas-

\(^{16}\) The other main indicator being the material deprivation rate

\(^{17}\) Source Eurostat

\(^{18}\) Source Eurostat
ures to be taken must be preventive and proactive in order to act upstream against poverty-triggering situations. Access to quality and affordable social and health services is primordial from this point of view (see part 4).

Another decisive factor when dealing with the phenomenon of poverty is illness. It can lead not only to absences, short or long, even to a definitive incapacity for work, but it can result in a loss of income. It also means having to contend with sometimes substantial costs. Age, an accident, a serious or chronic illness can thus plunge individuals and their family into an extremely precarious situation. That is why the development of quality healthcare systems that are accessible to all is fundamental. It is not only important to be able to obtain treatment regardless of income, but it is also essential that the prevention measures that reduce the risks of developing diseases are accessible to the population as a whole.

The problems or questions raised
As we have just seen, the very existence of national systems guaranteeing a high-quality social protection is crucial to fight against poverty. However, it is just a pity that no plans are afoot to develop these systems. On the contrary, these have a tendency to be called into question at a time when they are confronted with major challenges:
- the consequences of the crisis with, on the one hand, the increase in unemployment expenditure and, on the other hand, the tensions on public finances that it incurs. It is unacceptable that the workers are the twofold victims of this situation and that public deficits are being reduced to the detriment of solidarity. To ward off the spectre of long-term unemployment, the social protection systems must offer an active and secure framework that guarantees access and a return to quality employment;
- the phenomenon of the ageing of the population, whose consequences will be acutely felt in the pensions and healthcare sector. Intergenerational solidarity implies the need to ensure sufficient pension levels and to invest in the solutions developed in response to the requirements linked to this phenomenon, in particular support for dependence;
- the unacceptable growth in poverty and inequalities. The growth of the economy and of employment is not enough in itself to ensure a better social cohesion. Over these past ten years, inequalities have often increased and poverty and social exclusion remain a major problem in most of the countries of the EU. Building a true social cohesion requires a coordinated effort by the Member States in many areas of political action, in partnership with the social partners and civil society;
- the need to reinforce well-being and social cohesion to the benefit of all European citizens. Over the past few years, they have been pinning their hopes on new social policies that are efficient and progressive at social level and lasting at economic level.

In the light of these challenges, it is essential to point out that social protection is a productive investment. In fact, in the wake of the 2008 financial crisis, the social protection systems not only helped protect Europeans against the most serious consequences of the financial crisis but also played a countercyclic role as an economic stabiliser. Member States with a high level of
social protection are those in the best situation to cushion the blows on the national economies and labour markets, in particular by avoiding a collapse of internal consumption.

However, the added-value injected by the acquired social rights is not recognised at its fair value. In the absence of a reinforced economic and social governance, the Member States act as competitors. Certain countries of the Euro Zone – that no longer have the luxury of competing through exchange rate adjustments – freely practice social dumping and exercise a downward pressure on wages, social expenditure and business taxation. Failing any ambitious convergence policies, the social systems are under threat from these practices developed by certain Member States that use the reduction in social expenditure as leverage to attract investments by foreign capital.

Social protection systems have been feeling the pressure for more than twenty years. The phenomenon of globalisation, of the open economy or changes in production methods used to be the reasons bandied about. Now, the consequences of the crisis and the need to consolidate public expenditure are the excuses put forward to justify more restrictions in the social fields. So-called “modernisation” policies have been implemented, encouraged by the European authorities. The buzz words are: increase in the efficiency of the benefits, sustainability of public spending, active policies. But what are the concrete results of these reforms?

2.3 Healthcare: privatisation and cost cutting

As far as healthcare is concerned, we have noted a clear trend towards privatisation and cost cutting. However, privatisation brings with it clear-cut inequalities in the access to treatment due to the risk selection practices that characterise any private insurance scheme. In the interests of profitability, the insurance companies are careful not to cover risky patients and serious pathologies. Similarly, they have no time for prevention policies, despite their longer-term profitability. Furthermore, privatisation carries a greater risk of fraud: those patients able to pay to take out a private insurance policy run more risks of falling into the hands of unscrupulous doctors who accept to provide treatment in return for “bribes”. As for cost cutting, it has led to the setting up of effectively useful measures such as a greater empowerment of practitioners or the upgrading of first line care (to encourage visits to the general practitioner and limit automatic recourse to a specialist doctor). But it has also been deployed to the detriment of the healthcare offering (in particular by reducing the number of medical staff whose working conditions have deteriorated), via the increase in the patient’s personal contribution to their own care and also via the geographical availability of care, creating imbalances, in certain countries between urban areas where there is a surplus of availability, and the rural areas or more remote areas where it ends up being in short supply...
2.4 Pensions: fewer public pensions and more supplementary schemes

Anticipating the effects of population ageing on funding and expenditure, the Union has encouraged the Member States to start reforming their pension schemes along the following lines: incentives to work longer, encouragement to develop private supplementary pensions, introduction of stronger links between social contributions and the allowances/benefits paid out, consideration for the growing longevity when determining allowances. Therefore, these changes globally lead to a shift towards private schemes: usually through capitalisation, a reduction in the levels of public pensions and an increase in minimum pensions. Moreover, this trend risks being further exacerbated following the economic crisis. By the end of 2010, the Social Protection Committee has been commissioned to draw up a joint report with the Economic Policy Committee (EPC) on the question of the viability and adequacy of the EU’s pension schemes to the backdrop of the impact of the economic crisis and the long-term prospects in this field. An intermediary report dating from May 2010 already showed marked tendencies: incentive to work longer (even after the age of 65) and downward pressure on the level of public pensions.

The supplementary pension schemes can be useful as long as they can offer a supplementary income to pensioners. However, they cannot be considered as an alternative solution to the problem of the viability of public pension schemes nor, above all, can they call them into question. The development and setting up of the supplementary schemes should, in the interest of the contributors and pensioners, meet a certain number of requirements in terms of management, accessibility and solidarity. It is important that the social partners are involved in their negotiated set up and their management control. They should cover the life risk and cater for (ensure an income) periods of illness, even of economic unemployment or absences on family grounds. Access to these supplementary schemes should be guaranteed to all workers of the sector or of the company. The principle of equality of treatment between men and women should be applied. Finally, we should make sure that we promote investments that have a positive impact on employment and discourage purely speculative investments.

2.5 Unemployment insurance: activation policies and limitation of the entitlements to benefits

Another sector of social protection that has undergone far-reaching changes thanks to the momentum generated by the European institutions: unemployment insurance. However, it should be noted that this area has never been dealt with within the framework of social protection but only in that of the European Strategy for Employment. Following the adoption of the Lisbon strategy and the

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introduction of quantified objectives in the field of employment rate, the Member States have been prompted by the guidelines to roll out activation policies, to reduce the level of allowances, even to limit their payment over time. The so-called active policies must certainly not be condemned, especially if they are designed to ensure an efficient support to job seekers and guarantee them access to qualifying training courses. The granting of adequate unemployment benefits combined with dynamic labour market policies make it possible to stabilise the economy and promote an active adaptation to change thanks to an improvement in skills and efficient job-seeking and reconversion initiatives. However, most of the activation policies conducted over the past few years have a tendency to put responsibility for the return to employment in the hands of the worker alone and above all to make the granting of the allowance dependent on an “allegedly” active job search. This leads to certain perverse effects in terms of inequalities and confinement to atypical low-skilled and/or low paid jobs.

Tightening the criteria governing entitlement to the allowance is an inappropriate policy, particularly in times of economic crisis where the demand for labour is low. The risk is that this will create further insecurity for persons who are already excluded, which represents a significant obstacle in terms of professional (re)insertion. These eviction policies can also have the perverse effect of provoking shifts towards other sectors of social protection such as social assistance or incapacity for work, which should be avoided.

3. The trade union strategies

As a tool of redistribution, solidarity and well-being, the social protection systems are therefore an important bulwark against poverty. Given the pressure exercised on them for the reasons set out above, what strategies should be developed by the trade union organisations to reverse this trend? How to allow social protection to effectively play its role, in particular by guaranteeing the sufficient means? How to ensure that we further consolidate these systems, not as «social handout» policies but because they are a productive investment.

Economic growth does not in itself forge better social cohesion nor does it put an end to inequalities. A firm commitment should therefore be made at European level for a quality, efficient and voluntary social protection model. Among the obstacles to this kind of model we have already underlined the limits of the OMC to guarantee a better harmonisation of the various systems as well as the lack of coordination between the social partners on matters relating to social protection.

Yet we must not forget the essential role played by the trade union organisations in the setting up of the various national social security systems. Therefore, why would it be any different at European level? The construction of a better social coherence in Europe will only be impossible with the mobilisation and involvement of the worker organisations. Coverage of social risks is at the very heart of their concerns. This need for security and well-being must be one of the main battles to be fought within the framework of the European social dialogue.
The Open Method of Coordination is a valuable instrument as it sets out to conduct actions that converge towards common objectives. However, this instrument is also imperfect in the way in which it is applied to social protection. At present, it does not make it possible to build a truly European social model based on convergent social systems (due to their lack of harmonisation). We therefore need to reinforce and improve the social protection OMC.

To ensure that this OMC brings about more well-being and averts downwards pressures on our social protection systems, we would do well in particular to:

– extend its scope of action;
– define qualitative and quantitative objectives;
– establish an evaluation report of the activation policies;
– ensure that it becomes a fully-fledged democratic process via a better involvement of the social partners.

3.1 Extending the scope of action of the social protection OMC

As we have seen above, the OMC is only applied to social protection within the framework of the fight against poverty, social exclusion, pensions, healthcare and long-term care. But what about extending its scope of action to the other aspects of social protection, namely: unemployment insurance, incapacity for work, the protection of maternity, family benefits, the policy of handicapped persons, industrial accidents and occupational diseases? The debate is open. But whatever the scope covered, it is important in particular to set up a monitoring strategy in order to study whether the allowances paid are of an adequate level and effectively follow the evolution of living standards within the various Member States.

3.2 Defining the qualitative and quantitative objectives

Contrary to the European Strategy for Employment (cf. employment rate), the social protection OMC does not come with quantified objectives towards which the Member States make a clear commitment. One single exception confirms the rule: the recently adopted Europe 2020 Strategy includes a guiding principle that is specifically dedicated to social inclusion and the fight against poverty with the commitment that it will save at least 20 million persons from the risk of poverty and exclusion20. These kinds of measurable objectives should be set for all aspects of social protection and for public services (see healthcare, childcare services, etc.).

20. « Cette population est définie comme étant le nombre de personnes qui sont menacées par la pauvreté et l’exclusion au regard de trois indicateurs (risque de pauvreté, dénuement matériel et fait de vivre dans un ménage sans emploi), les États membres étant libres de fixer leurs objectifs nationaux sur la base des indicateurs qu’ils jugent les plus appropriés parmi ceux-ci. » Conseil Européen, 17 juin 2010, Conclusions, EUCO 13/10.
3.3 Drawing up an evaluation report of the activation policies

Inspired by the European Strategy for Employment, the activation policies have been taken up by many Member States. However, little is known about their characteristics and real impact. It is therefore important to investigate whether they are effectively the fruit of a balance between the values of solidarity, responsibility and cohesion and whether they carry any risks in terms of inequalities and confinement in atypical low-skilled and low-paid jobs.

3.4 Involvement of the social partners

Although article 160 of the TFEU relating to the role of the Social Protection Committee provides that the Committee fulfils its mandate within the framework of “appropriate contacts” with management and labour, it must be noted – and deplored – that within the framework of the OMC, the social partners, and in particular the trade union organisations, are not really involved in the elaboration and setting of the joint objectives nor in the drawing up, implementation and evaluation of the National Action Plans. Yet, within the Member States, the social partners mainly play a major role in the national social security systems (negotiation, management, etc.). That is why it is important to ensure that they are more closely involved in the implementation of a reinforced social protection OMC.
Glossary

Employment Committee (EMCO)
Set up in 2000, this Committee sets out to promote awareness of the high level of employment expected from the creation and execution of European policies. The Committee monitors the employment situation and the measures taken in the Member States and the European Union in this field. Furthermore, it encourages coordination between the Member States in the field of employment and policies relating to the labour market. The Committee works with social partners to formulate opinions, in close cooperation with the committees entrusted with social protection and economic policy. It is comprised of representatives of Member State and the European Commission.

Economic Policy Committee (EPC)
Since 1974, the EPC has been helping the Commission and the Council to coordinate the economic policies of the Member States by supplying analyses, opinions and political recommendations concerning the structural policies that set out to improve the potential for growth and employment within the European Union. The EPC not only helps to ensure the smooth operation of the markets for goods, capitals, services and labour but also to reinforce the role and performances of the public sector, and the long-term quality and viability of public finances. Similarly, it issues advice on the economic implications of specific policies, including those linked to the environment, research and development or social cohesion. It is comprised of representatives of the Member States, the European Commission and the European Central Bank.

Active inclusion
A strategy that sets out to facilitate the integration of persons fit to work in a sustainable and quality job and to provide others with sufficient resources to live in dignity and help with social participation.

Social inclusion
A process allowing persons at-risk-of poverty and social exclusion to benefit from the possibilities and resources necessary to participate in economic and social life, by enjoying a standard of living considered as normal for the society in which they live.

Social transfers
Transfer of incomes and public payments to persons and social categories, without counterparty by the beneficiaries, with a view to improving their standard of living.

Risk of poverty
The national threshold of the risk of poverty is set at 60% of the national average income per adult equivalent. The average income divides the total population into two equal parts. The income per adult equivalent is calculated by dividing the total income of the household by its size, determined by the application of the following weightings: 1.0 for the first adult, 0.5 for the other members of the household aged 14 years or over and 0.3
for each member of the household under the age of 14. The total available income of the household is all of the net monetary income received by the household and by its members, namely all the income from work, private income from investments and property and all the social transfers obtained directly (including old age pensions), deducting taxes and social contributions paid.

Material deprivation rate
The material deprivation rate is defined as the inability to afford at least three material elements among a list of nine:
- the ability to pay unexpected expenses;
- the ability to afford a one-week annual holiday away from home;
- being confronted with payment arrears (mortgage or rent, utility bills, hire purchase instalments or other loan payments);
- the ability to pay for a meal involving meat, chicken or fish (or vegetarian equivalent) every second day;
- the adequate heating of a dwelling;
- the possession of a washing machine;
- the possession of a colour television;
- the possession of a telephone;
- the possession of a personal car.

Funded pension schemes:
Method of financing pensions that concerns “defined contributions” schemes and that is based on an accumulation of savings prior to retirement (within an individual or collective framework). The contributions of the insured are “capitalised” and invested in financial or real estate assets. The accumulated sums can be paid to the pensioner at the time of retirement, either in the form of a lump sum, or in the form of an annuity, which can be a life annuity (i.e. paid until his death) or limited in time, or according to a mixed formula (lump sum and annuity). The yield of this pension system is the interest rate. This system is therefore particularly sensitive to the stability of financial markets and vulnerable to its fluctuations.

Pay-as-you-go pension schemes
Method of financing pensions that is based on intra and intergenerational solidarity. The contributions of those in work serve to finance today the pensions of those in retirement. The contributor accumulates only pension rights that will be liquidated once the workers meets the conditions of seniority and pension departure age required to benefit from a full pension. The yield of this pension scheme is the rate of growth of the economy. This system is particularly sensitive to the employment ratio between those in work and those out of work.
Quality in work and flexicurity

1. Defining the concepts

Quality in work depends on the presence of adequate conditions of security for workers in order to guarantee their integration and long-term progress on the labour market and foster a broader acceptance of the change.

The job security dimension is difficult to measure. In a dynamic perspective, security refers to an individual’s ability to remain and progress on the labour market. It includes decent pay, reasonable access to life-long learning, satisfactory working conditions, appropriate protection against discrimination and unfair dismissal, adapted support measures in the event of redundancy and the right to transfer acquired social rights in the event of professional mobility. These are all factors therefore that, together, determine and condition quality in work in the European Union.

The impact of these different factors will be tackled in detail below in this part of the “manual”. But it is however important to comment on one specific development, which, while it may be “all the rage” today, is also the most ambiguous, namely «flexicurity».

The term “flexicurity”, along with its “flexecurity” or “flexisecurity” variants, is the contraction of flexibility and security. It is frequently used to refer to a social system that combines a great facility of dismissal for companies (flexibility) with compensation that varies in length and amount for the employees made redundant (security).

Looking beyond the attitude/experience of workers, who associate this concept of “flexicurity” with greater job insecurity, it is necessary to “return to the origins” and remind ourselves that, initially, the Danish experience was used as the reference for the flexicurity that is at the heart of the current debate. In Denmark, the notion of “flexicurity” was mentioned for the first time in a 1999 publication by the Ministry for Employment (Arbejdsministeriet) describing what has famously been referred to as the “golden triangle” of flexicurity, namely:

– far-reaching labour market flexibility;
– an generous compensation system of the unemployment period;
– and active labour policies.

It is also important to remember that, in Denmark, this concept is based on
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a very advanced social dialogue between the trade unions and the employers, combined with a high rate of trade union membership.

Inversely, when the term “flexicurity” is wielded, in particular by certain politicians or employers, the discussion turns only around “the freedom to dismiss workers” and the waiving of the “protection of employment”.

2. So what does the Danish example show us exactly ?

It is true that, to go by the international rankings drawn up by the OECD, “job protection” is relatively low in Denmark, considered against the criteria used to determine the quality of “job protection”.

For example, the global protection of employment includes:

– notice periods ;
– redundancy pay ;
– administrative formalities and bureaucratic procedures (for example, the need or otherwise to request and obtain authorisation before laying off workers).

As regards Denmark, Danish labour legislation, for example, does not oblige employers to obtain an administrative authorisation before a layoff. But does this mean that workers can simply be laid off immediately?

As Nordic tradition would have it, the social partners have negotiated labour protection for workers to make up for the void left by labour legislation. For example, the Danish collective bargaining agreements oblige employers to give a very long notice period to workers who will be laid off (between 4 months and 5 months depending on the seniority of the worker).

The interest of this “notice” is that it triggers, as soon as the collective layoffs are announced, the intervention of the public office for employment and of the partner social institutions, which offer advice and assistance to workers during their notice period. However, this does not release companies from the duty to invest time in innovation, training and the internal mobility of the workforce in order to be in a situation to anticipate reorganisations. In fact, the companies invest significantly in the continuous training of their employees so that, in the event of job losses, they preserve their employability, either in the same function or in another function.

Furthermore, in addition to this “employment protection”, workers who lose their job can claim unemployment benefit amounting to over 80% of their net salary, and that for a maximum duration of 4 years (making it one of the longest durations in the EU, with the exception of Belgium, where the benefit, although less generous, may be granted without limitation in time).

Furthermore, workers and job seekers are entitled to support from the public authorities and social security in the field of childcare, parental leave, etc. Therefore, the Danish example, once fully grasped and correctly implemented, can make it possible to combine flexibility and security in order to develop more and better jobs.
3. The European reality: the role of each aspect of quality in work in the fight against poverty and social exclusion and the questions/problems raised

Flexibility and job security
To the background of globalisation, constant reorganisation and the evolution towards a knowledge-based economy, the European job markets need to react better to the change. This calls for flexibility from companies and workers alike, in particular when it comes to the organisation of work, working time, contractual agreements and national or geographical mobility.

Part-time employment is one form of internal flexibility within companies. The highest rates are found in the Netherlands, the United Kingdom, Germany, Denmark and Belgium.

According to the cultural traditions, in particular the conception of the role of the woman in the education of children or in the family, part-time work can be an option that is developed and chosen to different extents.

In the Netherlands, three quarters of all part-time workers – in actual fact women – declare not to want a full-time job. Elsewhere, as is the case in Germany or in the United Kingdom for example, due to a lack of services and/or existing and adapted childcare facilities or provision, almost half part-time workers - but here also, mainly women- opt for this form of work in order to be able to take care of children or other dependants. The lowest rates of part-time work are observed in Greece, Portugal and in Spain.

All of this serves to feed the significant gender divide: more than one third of women work part-time, compared with 6.3% of men.

The proportion of employees working under fixed-term contracts has stagnated since 2000 at around 13%. However, significant differences should be noted between Member States. The highest rates can be observed in Spain (31 %), Portugal (22 %) and Finland (16 %). Contrary to the part-time employment rates, the proportion of women in temporary employment is only slightly higher than that of men.

While temporary and part-time jobs are designed (or should be !) as stepping stones into the labour market and facilitate labour market participation for certain types of persons, they are often used as a variable to adjust the workforce. And the data collected to date indicate that employees employed under these kinds of employment contracts indeed too often suffer from discriminations in the field of remuneration and pension and that they only have restricted possibilities of participation in continuous training and the improvement of their career prospects. This, despite the agreements signed by the European social partners on the 6th of June 1997 (which became a
European Directive on 15 December of the same year) on part-time work and on the 18th of March 1999 (which became a European directive on the 18th of June of the same year) on fixed-term employment contracts. Hence the need for a rigorous application of these Directives, with an involvement by the Member States and the social partners in their follow-through, as their instigators and signatories. Indeed, to favour a good balance between flexibility and security, it is important to guarantee employees bound by an atypical employment contract, effective equality of access to training, to healthcare and social protection.

**Working conditions**

The high absenteeism due to accidents at work and work-related illnesses and occupational diseases as well as the high number of permanent disabilities from occupational origin are the most visible consequences that poor health and safety at work can have on the labour market. In the European Union, in the year 2000, a total of 158 million days’ work was lost, corresponding to an average of 20 days per accident. Around 350,000 workers were obliged to change their jobs as a consequence of an accident. Nearly 300,000 workers have various degrees of permanent disabilities and 15,000 are entirely excluded from the labour market. In view of the need to attract and keep more potential workers on the labour market and in a context of an ageing –and therefore more vulnerable – workforce, better health and safety at work must be promoted.

With nearly 5 million accidents in 2000, resulting in more than 3 days of absence from work in the EU, the number of accidents remains too high, even though the incidence rate – defined as the number of accidents at work per 100,000 workers – has decreased. The average incidence rate of the EU amounts to 4,016 accidents resulting in more than three days’ absence from work. It has fallen in all Member States except for Spain, Ireland and Sweden.

There are also important sectoral differences in the distribution of the number of accidents with the highest incidence rates observed in construction, agriculture, fishing and services (hotels and restaurants), in particular in those sectors with a high number of temporary workers or irregular employment contracts.

According to the 1999 ad hoc module on “Work-related health problems” by the Labour Force Survey and to the survey of the European Foundation for the Improvement of Living Conditions on the perception of working conditions by workers and employers, more and more workers suffer from musculoskeletal disorders (such as back pain and disorders caused by repetitive movements) (52%), stress, depression and anxiety (18%) as well as general tiredness, hearing disorders and cardiovascular diseases.

It is the duty of employers to ensure that they:

– offer safe and healthy working conditions ;

– guarantee the adequate information and training for all persons at all types of positions ;
Trade unions and the fight against poverty and social exclusion

– establish and disseminate the procedures to handle occupational hazards,
– inform all workers, before they take up their job, of the agreements, policies and practices concerning health and safety.

Health and safety at work cost time and money and affect profits so that employers inevitably try to escape the responsibilities imposed on them by the legislation, namely: ensuring the health and safety of all workers at work.

The Member States should take the necessary measures to improve health and safety and achieve a substantial reduction in the incidence rate of accidents at work and occupational diseases. For example, five Member States (Denmark, Greece, France, Portugal and the United Kingdom) have set quantitative objectives on the reduction of the number of accidents.

The new Community strategy on health and safety at work puts the emphasis on the need to consolidate a culture of risk prevention, to combine various policy instruments such as legislation, social dialogue, progressive measures and best practices, social corporate responsibility and economic inventive measures and to develop partnerships between all the players involved. This strategy is geared towards a global approach to the problem that takes into consideration the transformations of work organisation as well as a series of emerging risks, including, as mentioned above, musculoskeletal problems, stress and other psychosocial risks.

The European directives relating to health and safety have given a new impulse and encouraged the development of health and safety conditions propitious to a significant reduction in the number of occupational accidents. However, less progress has been made than anticipated. As underlined by the strategy adopted, it is necessary to step up the efforts made to implement the provisions of the health and safety at work directives so that the protection of health and safety becomes a tangible reality that contributes in turn to the improvement of productivity and quality in work.

The environmental protection policies also have a role to play in the improvement of quality in work, in particular in the field of health and safety. For example, the REACH proposal relating to the management of chemical products makes it possible to implement risk reduction measures.

**Employment insecurity**

An erosion of the protection of labour rights can be observed world-wide, workers seeing permanent and regular jobs being replaced by an ad hoc workforce and temporary and unstable work.

Across all sectors, jobs are being outsourced and subcontracted by employment agencies and short-term employment contracts are routinely being used. Many jobs have become temporary and workers are deceptively being considered as self-employed workers. These workers are subject to unstable employment, lower pay and more dangerous working conditions as well as worse social protection. They are rarely entitled to the social benefits and are often refused
the right to join a trade union. And even when they are granted a trade union right, the workers are put off joining when they know that they can be easily replaced. Unionised workers also suffer from the fact that because of the reduction in the number of members, they wield less power around the negotiating table and have fewer development possibilities.

New types of employment that are emerging following the changes made in the world of work risk exacerbating employment insecurity and having, generally speaking, damaging effects on worker health. From a sociological point of view, insecure jobs are considered to be contracts that threaten to reduce the social security and economic stability of workers.

Recent research into employment insecurity, conducted in Spain, has revealed that the main risk factors of holding an insecure job are related to gender, age and social class. Women are usually more likely to be in an insecure job than men, and young people have to contend with more employment insecurity than older workers. Moreover, the least qualified workers are those that run the greatest risk of holding an insecure job.

The results of the Whitehall study (United Kingdom) revealed that workers who felt a chronic insecurity were in worse health, measured on the basis of the workers' own perceptions. Research shows that the downsizing of a company is an important risk factor for the mental and physical health of workers, leading to long-term absenteeism on health grounds. In order to be able to treat the problems linked to employment insecurity, it is vital to use precise definitions and to develop good quality indicators and validated instruments to measure this phenomenon.

It is further necessary to clarify the definition of employment insecurity and its risk factors and effects on worker health. More longitudinal research needs to be carried out on the subject. It is possible that some people in insecure jobs are in this situation due to their general vulnerability or their bad health. This underlines the need, when evaluating the effects of precariousness, to make a distinction between persons voluntarily working under a certain type of contract and others. In this context, it is also necessary to underline the fact that non-standard contracts are not necessarily insecure and that the advantages of part-time employment contracts or temporary contracts, for example, should also be taken into consideration, depending on whether or not they are chosen /not imposed.

Research shows that unemployment also plays a role in bad health, which in turn influences future employment. To further clarify matters, the subject should be studied among various populations, in different countries and in different work situations.

Moreover, there could also be a difference between what a worker perceives as an uncertain situation and what an uncertain situation objectively implies. Confusion also surrounds the definition of insecurity, making it difficult
to compare perceived insecurity and objective insecurity. However, there is evidence that even working conditions that are personally perceived as negative can have an actual negative effect on worker health.

Persons suffering from employment insecurity often do not have the possibility of participating in the social dialogue in the workplace and cannot take advantage of such a process. It is however important to allow workers working under non-standard employment contracts to participate in this dialogue and to arm themselves against social exclusion in the workplace. Insecure employment contracts can have very significant negative social consequences for workers, their family and society as a whole.

It is nevertheless important to highlight positive aspects (such as the economic advantages) of a good work organisation and a reduction in the level of stress within a company. Certain employers have already started to realise that if they want to keep their highly qualified and experienced workforce, they must offer them the “most secure” jobs possible. Actions taken at national level are also possible. In Spain, for example, the public authorities offer (offered) premiums to encourage more long-term contracts.

**Work-related stress**

The risks incurred by work-related stress have increased for several years, although the pace of life in the workplace seems to have stabilised since the end of the last decade. The global national figures may be misleading, as the trends at sector level, can differ slightly. The conclusions of these trends can be summarised as follows:

– we observe in many countries a combination of growing job applications and a stabilisation of applications, coupled with a reduction of autonomy in the workplace. This seems to reflect an increasingly stressful situation. The growing demands made of workers in terms of productivity, combined with a bad quality or less control of the pace of work, exacerbate stress-related disorders;

– demands other than “simply” quantitative seem to also play a substantial role, but questions relating to cognitive or emotional demands are no longer taken into consideration in many national studies;

– this means that relevant indicators reflecting work demands or control relating to social support or other aspects deemed to be important such as the hiding of emotions or (over) commitment are not generally yet included in the national statistics;

– little information on the trends of these so-called stress-related problems is available. Some countries have reported an increase in health problems linked to stress in the workplace but it has also been observed that workers who developed health problems (psychosocial) had left the job market due to a long-term absence or received disability pensions.

The groups at risk of falling victim to stress in the workplace have been mainly identified at sector level. The sectors employing a relatively high number of women seem to be risk-groups: healthcare, education, public service, hotels/restaurants and banking services. Sectors also considered as
risk groups, but mainly dominated by men, included goods transport and security services. However, these are relatively restricted sectors compared with those presented above.

Although the information on the costs of work-related stress is far and few between, when it is available, it reveals high costs. Most of the costs are incurred by absenteeism and incapacity for work resulting from psychological (health) problems. Although actual scientific evidence concerning the effectiveness of stress management at organisational level is in short supply, many good practices have been described. The commitment of the organisation itself and the involvement of both labour and management seem to be essential for the success of stress management activities although other factors are also identified as important. More scientific evidence is available in the field of individual stress management strategies. It is essential here to focus at an early stage on work and return to work after an absence linked to psychological problems.

Within the Union, the social partners are increasingly agreeing on the importance of the question of work-related stress, its identification and its cover, as illustrated by the framework agreement they signed on the 8th of October 2004. This framework agreement on work-related stress in an indication of this. It sets out to establish a framework, within which the employers and the worker representatives can work together to prevent, identify and combat work-related stress.

**Life-long learning**

The EU's policy places particular emphasis on the need to increase the investment in human resources from all sources (public authorities, individuals and businesses) and to improve the quality and efficiency of education and training systems with a view to promoting productivity, competitiveness and active ageing. While the participation of adults in education and training programmes is a serious matter of concern for most Member States, the critical issue is ensuring that everyone has access to training. The population groups most in need of training, such as the low-skilled, older workers, people on temporary contracts or part-time workers, and workers in small firms are also the groups least likely to receive training.

We observe a significant increase in the participation of adults in education and training programmes in the EU. The participation of women is higher than that of men at European level and in most Member States. However, substantial differences exist between the various Member States. The participation rate is under 5% in Greece, France, Portugal, Italy and Spain but above 16% in the United Kingdom, Denmark, Sweden, Finland and the Netherlands, against a European average of 8.5%.

Collective agreements on the provision of continuing vocational training contribute to reducing the large discrepancies in the provision of training. In companies with agreements, more than half of all employees have participated in CVT programmes compared with about one third of the employees of companies without a collective agreement.
Discrepancies in the provision of training by firm size exist in all Member States, both in terms of proportion of employees involved in training and of length of training provided. In Italy, Greece, Spain and Portugal, less than 10% of employees in small firms without agreement receive CVT, against 40% in the Nordic Member States.

To increase participation in education and training, there is a need to promote a culture of life-long learning and raise awareness amongst individuals and employers of the benefits of learning. This demands a significant increase in investment in human resources, notably through the creation of incentives for companies and individuals to pay for additional training; improving information, advice and guidance; better coordination of learning systems and finally improving quality management, evaluation, accreditation and certification of continuing vocational training.

Particular attention should be paid to older workers, the low skilled and more generally to those people facing a risk of temporary or long-term unemployment. In this context, companies should be encouraged to significantly increase their investments in training, particularly of groups most in need of training. This demands that Governments create a propitious climate providing the right incentives for employers to invest.

The acquisition of basic skills in information and communication technologies (ICT) should become an integral part of enhancing employability, as the lack of ICT literacy represents a fundamental barrier for (re)entering employment. In some Member States, basic ICT literacy has already become mainstreamed in activation measures.

Closer partnerships between business, social partners, the public sector and private service providers are critical to identifying training needs and improving access to training for all population groups concerned.

The strategic challenges of the EU for 2020 are:
- to make lifelong learning and learner mobility a reality;
- to improve the quality and efficiency of provision and outcomes;
- to promote equity, social cohesion and active citizenship, and
- to enhance innovation and creativity, including entrepreneurship, at all levels of education and training.

**Work organisation**

Work organisation and work-life balance depend on a number of factors treated under the paragraphs devoted to other dimensions of quality in work: the introduction of more flexible methods and forms of work, including flexible working time; the availability of adequate care provision for children and other dependants, a more balanced approach between flexibility and security; a better application of existing legislation on health and safety and, finally, the adaptation of workers to changes at work through lifelong learning at company level.

Parenthood has a negative effect on women’s employment rates. The average
The differences in women’s employment rate with and without children is particularly high in Ireland (16.3 pp), in Germany (21.4 pp) and in the United Kingdom (22.9 pp). In these countries, as well as in others such as Spain or Greece where the differences are relatively smaller, the care services offered are not sufficient to deal with the scale of demand. In this context, it is noticeable that throughout the EU the frequency of part time work is five times higher among women than among men (33 and 6% respectively).

More than 10% of employees in all Member States of the EU, expect in Denmark, Ireland and the southern EU Member States, work overtime hours. The share of employees working overtime is highest in Austria, in the Netherlands and the UK and more than 30% of all employees work overtime. In a large majority of countries, notably the southern EU Member States, there is comparatively little flexibility in working time arrangements.

Flexible working time arrangements and adequate care services for children and other dependants are essential to ensure the full participation of women and men on the labour market. Some efforts to reconcile work and family life have been implemented in most Member States, These initiatives include: more flexible work and working-time organisation (Germany, Belgium and France); part time work facilities (Sweden, Luxembourg and Ireland); the development of parental leave (Denmark, France, United Kingdom, Spain and Netherlands); the deadlines for access to childcare provision (Belgium, France, United Kingdom, Ireland, Netherlands, Greece, Spain, Portugal and Sweden).

Nevertheless, childcare provision is still far off the targets set out by the EU, which specify that childcare should be provided to at least 90% of children between three years old and the mandatory school age and at least 33% of children under the age of three. Therefore, a greater effort should be made in providing more accessible and high-quality care services for children and other dependants, in order to facilitate the choice between part-time and full-time work. The social partners’ implication is a necessary condition to achieve this target.

The Knowledge Society opens up new perspectives for the quality of work: creating conditions for change in existing jobs; generating new working methods and new ways of organising work; allowing greater flexibility in the workplace. Telework represents a specific case of ICT-driven flexibility, enabling new forms of work organisation and work-life balance, removing barriers to mobility and opening thus new job opportunities for people excluded so far from the labour market. On the 16th of July 2002, the European social partners signed such an agreement relating to telework.
Risks of poverty for underprivileged groups (women, migrant workers, young people, etc.)

An inclusive labour market implies that it is possible for all citizens of working age who are willing and capable of work to enter and remain on the labour market.

4.4% of the EU population of working age were inactive despite declaring that they wanted to work. Reasons for not working included in particular family responsibility, illness or disability, other reasons for non-availability for work and discouragement in the search for work.

Long-term unemployment entails serious risks of exclusion from the labour market and gives a measure of the capacity of the labour market institutions to reintegrate workers. Long-term unemployment has decreased slightly but still affected around 3% of the EU labour force. It remains most common in Greece and Italy, where more than 5% of the labour force is affected. For the EU as a whole, long-term unemployment rates are higher for women than for men, although the opposite applies in Finland, Ireland, Sweden and the United Kingdom.

Young people in many Member States face great difficulties in accessing the labour market. Youth unemployment has remained at around 15% within the EU, or double the global unemployment rate. Youth unemployment is particularly high, at 20% or more, in Finland, France, Greece, Italy and Spain. The available data show a relative poor performance on transition from unemployment into employment. Ensuring an appropriate transition from unemployment and inactivity to employment is the aim pursued by activation and prevention policies. However, only five Member States had met the target on prevention and more efforts are needed to improve the effectiveness and efficiency of active labour market measures.

The labour market tools to promote inclusion include “Making work pay” policies, life-long learning and positive management of company restructuring. Facilitating participation in employment for people who are distant from the labour market is also a major plank of the EU Inclusion Strategy, which covers many other policy fields such as housing, health care and social protection systems. That is also the meaning of the agreement signed on the 25th of March 2010 between the European social partners entitled “Achieving an inclusive labour market”.

4. Trade union strategies

The trade union strategies established on the basis of the observations made above, are founded on the promotion and development of quality in work, which should serve as the guiding principles of the modernisation of the European social model. Quality in work goes hand in hand with progress towards full employment, higher productivity growth and better social cohesion.

There is a positive link between employment growth and quality in work. Sustainable employment growth needs all of the following: an improved
access to employment in general, an improved balance between flexibility and security and real opportunities for upward occupational mobility for those in low quality jobs, without making access to the labour market more difficult for those on the margins, a reduction of long-term unemployment without creating a situation based on repetitive spells in employment and low-quality employment; and improved upward quality dynamics, helping people in low quality jobs and at high risk of unemployment to gain employment stability and to improve employability.

There is also a positive link between quality in work and productivity. In particular, improvements in work organisation and in working conditions, as well as the increase in the quality and efficiency of investment in human capital and training are essential for productivity gains.

Quality in work is also essential for both social inclusion and regional cohesion. A high risk of unemployment, social exclusion and poverty go hand in hand with poor education, low skilled, low paid and non-permanent jobs.

For trade unions, flexicurity – which has been mentioned above extensively – is not the only model of employment market structure that aims for economic success. Certainly, the aim is to find a “socially acceptable” balance between the needs of firms and consideration for human, social or sustainable development. This “socially acceptable” balance must lead to a win-win situation. One of the ways of achieving this lies in bargaining between the social partners and, more generally, through social dialogue and its quality. This balance depends also on the capacity to respect the state of law and to apply the existing legislations (EU and national) in the fields of social policy and the labour market, the fight against undeclared work and respect for and promotion of the role of the social partners. It would be deplorable for the agenda of the Commission in the field of flexicurity to lead to greater competition between low skilled workers, instead of leading towards a macroeconomic policy, which would contribute to boosting the economy and creating more and better quality jobs. The ETUC believes that the seven following principles must serve as the basis for any flexicurity approach.

**Fighting against precarious jobs and promoting quality in work**

Precarious jobs are precarious not only for the worker, but they also have an undesirable effect on the labour market and the economy. The growing proportion of fixed term contracts is having negative effects on productivity, as temporary workers have much less access to the training courses offered by the employers. Workers hopping from one irregular employment contract to another will have less stable and lower incomes and suffer from a higher incidence of poverty. Greater employment insecurity will also lead to more “saving for a rainy day”, leading to a downturn in demand and growth. New types of flexible jobs can have impacts on health that are more negative than permanent jobs. The working conditions of non-permanent workers are worse than those of permanent workers. Workers in a flexible job situation are exposed to more dangerous working environments. Compared with permanent workers, employees under temporary contracts are much more exposed to bad working conditions and a worse protection in the field of health and safety (such
as vibrations, high noises, dangerous substances of repetitive tasks). Finally, it should be noted that the European workers themselves grant a great deal of importance to the security of their jobs. Three quarters of European workers believe that job security is the most important factor as far as job quality is concerned. A vast majority of Europeans believe that relaxing the rules on job protection will reduce job performance. For the trade union strategy, the flexibility/security agenda cannot be separated from the “quality in work” agenda. The latter is indispensable to ensure a very real balance between flexibility and security, one that it will not tip in favour of employers and profits.

Quality in work is also important to put employers back at the centre of the equation and therefore to make them face up to their responsibilities. However flexicurity tends to be quite a boon for companies, given the way it is interpreted and, too often, practised by them, notably by allowing them to develop insecure jobs and by shifting their responsibilities towards their employees to the public powers/institutions, such as Social Security, through unemployment benefit, for example.

Concentrating on upward rather than downward flexibility and improving work organisation

From the point of view of the company, there are several flexible means of appointing workers (fixed-term contract, temporary, part-time, etc.). On the other hand, from the point of view of the worker, there is a distinct lack of flexibility, and a surplus of rigidity, whether in terms of work organisation, working time arrangements or use of their skills. The flexibility of the labour market, defined as an upward flexibility, is important for workers and the economy as a whole. But what are the components of a “positive flexibility”? It is that which guarantees a certain number of collective and individual rights, such as right to access life-long learning, the recognition and transferability of formal and informal skills, the availability of special programmes in the event of a reorganisation or industrial change, ensuring the protection of the professional career by professional requalification as well as the maintenance of the rights and support to income during transitions between jobs, whether within the same organisation or company or in the case of a transition towards another job, another workplace or another country.

Safeguarding legislation on the protection of employment and completing it through labour market policies encouraging upward mobility

There are indications that Member States and the Commission see flexicurity as a means of reducing employment protection legislation (EPL) or of providing employers with a broad range of different employment contracts in the hope of thus making the European labour market more flexible and more dynamic. However, wanting to reduce EPL on the grounds that it stands in the way of high levels of employment or flows of jobs on the employment market has no objective foundation. Inversely, stable working relations improve cooperation between workers and foster a stronger personal involvement in their work, thus contributing to increased productivity. Moreover, the employment protection systems, in particular through notice of redundancies, serve as “early warning” systems. The longer the notices, the better the
situation with regard to employment, as they make it possible, in this case for the workers concerned, to prepare for the change and to start looking for a new job or an adequate training programme. The time spent unemployed is thus reduced and the workers find new and productive jobs easier. The prior notice makes it possible to combine a certain protection of the existing job with the preparation for a change of job. This approach is better than that of making people redundant and “activating” them only after a certain time spent unemployed.

**Maintaining a broad approach to balance flexibility and security**
Over the above the Danish model of external flexicurity, there are other flexibility/security “models”, such as for example:
- the Dutch inspired model, with its “equivalent rights approach” authorising certain forms (not all!) of flexible work while guaranteeing that equivalent workers enjoy equivalent rights, which is important, in particular, to ensure the mobility of these flexible contracts towards other more regular jobs;
- the German-inspired model of external numerical flexibility where the jobs are safe, but where the working time and organisation are rendered more flexible, usually through collective bargaining;
- the internal functional flexibility model in which workers move from one job to another within the company;
- and, finally, a new model that is set to develop in Southern Europe where trade unions and governments are dealing with the serious lack of flexibility of their labour market, on the one hand, by reinforcing their work legislation (putting an end to the practice of chains of fixed term contracts) and, on the other hand, by using tax policies to punish the “bad employers” and reward the “good” employers that offer regular employment contracts.

**Improving the social security systems**
In Europe, every year, more than 14 million people leave their job for various reasons: redundancy, end of a temporary employment contract, illness, family, education and others. Concentrating on employability is not enough. To facilitate transitions, workers need more stability, security and to be part of predictable labour market. One of the major aspects of the discussion on flexicurity relates to the question of knowing how to insure the risk of employment, of illness and other risks inherent to life. One of the neoliberal economic theories would have it that a higher individual risk for workers “encourages” participation in the labour market. However, several elements demonstrate that the opposite is true, that active labour market policies and high social benefits are the factors that encourage participation in the labour market. On the other hand, some groups are more exposed and at-risk and for them “security” must take priority over “flexibility”. That is the case for example for women, immigrant workers, the disabled, young people or workers with atypical employment contracts. Individuals are more ready to accept change and will have more confidence if the social security/protection systems give them opportunities in the field of training, rehabilitation and adaptation. Quality and universal social security policies, active labour market policies and strong trade unions create the social infrastructure that facilitates adaptation and thus makes workers more open to change and adaptation.
**Integrating the flexicurity policy and the macroeconomic policy**
As we have seen, flexibility does not create one job (no more than flexicurity). While flexicurity can, to some extent, facilitate adjustment on the labour market and allow a smoother transition between jobs, it does not increase the total performance of employment. This means that flexicurity policies should be implemented in conjunction with macro-economic policies that support the growth and creation of new and additional jobs. Thus, in Denmark, for example, it was only from 1993, when the government used the tax and monetary policy to encourage demand and the growth of the economy, that it started to see economic success and a growth in employment. Consequently, we cannot talk of “flexicurity” while ignoring macroeconomic policies that encourage economic growth. The objective of the European trade unions is to create more jobs of a better quality, and not to increase competition between the workers for the same quantity of available jobs, which can only lead to a reduction in wage conditions. This approach, which consists of playing workers against other workers (“internal” against “external”) must be vigorously rejected. We stress that replacing protected and decent jobs with insecure jobs is not at all a solution, including for groups that are already faced with very high unemployment rates. This approach, which increases the insecurity of a large part of the working population, will have no lasting positive effect on the economy. The effect will be the exact opposite of what Europe is seeking to promote, namely the social responsibility of companies and social cohesion. Thus mobilisation must be for “more and better jobs” and not for fewer and worse jobs.

**Improving social dialogue and collective bargaining**
The social partners, collective agreements and the participation of workers can make it possible to reconcile flexibility and economic development on the labour market by setting rules binding on the entire labour market, forcing companies to compete through productivity rather than through wage competition. The trade unions give workers a direct hold over the management, which increases the chances of solving problems through discussion/negotiation rather than through redundancy. The most important aspect of a “positive flexicurity” lies in the involvement of the social partners. They will thus be able to define the rules and guarantee the balance between flexibility and security. They need instruments, allowing them to anticipate change, to control respect for and implementation of the collective rights and individual careers. The quality of relations between the social partners is crucial for the smooth running of the labour market. When, as is unfortunately often the case in many new Member States, the social dialogue is inadequate and the social partners weak, the possibility of balancing the labour market is reduced.
Services of general interest

1. Definition of the concept: what is understood by “services of general interest”?

The reality of services of general interest in the European Union is complex and constantly evolving. It covers:
- a broad range of types of activities, from the big network industries (energy, postal services, transport and telecommunications) to health, education and social services;
- a wide dimension in the provision of these services, from European or even global to purely local level;
- services provided on a different basis: some are market based and some non-market in their nature;
- the organisation of these services varies according to historical, geographical and cultural traditions and the characteristics of the activity concerned.

For example, if we take the EUROPA glossary, general-interest services are services, market or non-market, considered to be in the general interest by the public authorities, and accordingly subjected to specific public-service obligations. They include non-market services (compulsory education, social protection, etc.), obligations of the State (security, justice, etc.) and services of general economic interest (energy, communications, etc.). It should however be pointed out that the conditions of Article 86 (former Article 90) of the Treaty relating to the rules of competition — do not apply to the first two categories (non-market services and state obligations).

In some countries, the notion of Services of General Interest covers those “public services”, which can designate
- either services with an essential public service mission;
- or the administrative services rendered by the public power;
- or the network services (energy, communication or transport for example).

We therefore see that the term “services of general interest” remains however largely undefined. Although the specific characteristics of these services remain obscure, the term includes healthcare services, social services, education services, cultural services and audiovisual services, which are often the competence of the regions.

In the light of the confusion surrounding the correct term, the European Union has chosen (Protocol 26 annexed to the Treaty on the Functioning of the
European Union – TFEU) to use the term “services of general interest” (SGI). Some have an economic character and are known as “services of a general economic interest” (SGEI). Others, inversely are “non economic services of general interest” (NESGI), such as education, Social Security, etc. The SGEI are governed by the European Treaties, i.e. in particular by the rules of competition, but derogations are possible subject to specific public service obligations by virtue of a criterion of a general interest.

For the ETUC, the debate on the Services of General Interest is much more than a battle of words and has much greater “political” implications as regards the action taken by the Union to build a European society that is not only driven by the laws of the market and free competition but that nurtures social cohesion, i.e. no exclusion, and solidarity between its members.

That is why these services of general interest are at the heart of the political debate. They touch on the central question of the role played by the public authorities in a market economy, namely, on the one hand, ensuring the proper functioning of the market and respect for the rules of the game by all the players and, on the other hand, guaranteeing the general interest, in particular the satisfaction of the essential needs of citizens and the preservation of public commodities when the market does not succeed in doing so.

**2. What is the actual situation of services of general interest at European level and in the different countries ?**

Services of general interest account for more than 26% of the GDP of the EU of the 27, they employ more than 64 million persons and invest every year more than 150 billion euros in the purchase of goods and services.

Furthermore, public investments in green electricity, renewable energies and green transport make a significant contribution to the transition towards a sustainable economy with a low carbon footprint.

This question of services of general interest (in particular on the means of accomplishing their mission with regard to the rules of the Union) has given rise to a lively or even heated debate within the Union for more than 10 years.

For example, back in 1996, the Commission published a Communication entitled “Services of General Interest in Europe”, which it updated in 2000. It expressed its wish to complete the sector actions with a discussion on the SGI and the SGEI on the whole. And while reaffirming the “benefits of liberalisations” in the various sectors, even of reinforcing them, it also and in particular affirmed the concern of the Union – the Community at the time – to promote European general interest and to ensure the SGEI objectives are properly accomplished.
In May 2003, the Commission launched a far-reaching consultation via its “Green paper on Services of general interest in Europe”, the aim of which was to determine how the rules of the European market affected certain of these public services and to what extent it appeared necessary to create a new legal framework dealing specifically with these services. Thus, this document triggered a debate on the role of the European Union in the promotion of the provision of services of general interest, in the definition of their general interest objectives and in the way in which they are organised, financed and evaluated.

Downstream of this debate, in May 2004, the Commission adopted a White Paper in which it set out the approach chosen by the European Union to favour the development of quality services of general interest. The document presented the main elements of a strategy that sets out to ensure that all citizens and companies of the Union have access to affordable and quality services of general interest. It proposed in particular nine European principles designed to lay down the rules of the market and the public service missions. The Commission thus intended to develop and pursue its sector approach without having to take recourse to a framework directive.

It also announced the publication of a new Communication, in the course of 2005, on the social and healthcare services.

This Communication was finally published in April 2006. In fact, this Communication did not concern healthcare services but dealt with two other main categories of services:
- the statutory and supplementary social security schemes;
- and the other essential services provided directly to the person (assistance for persons faced by personal challenges or crises, social and professional insertion, activities to integrate persons with long-term health or disability problems, social housing).

The aim of this Communication was to clarify the situations in which these services are subject to the European single market. It marked the beginning of a regular process of evaluation that sets out to ensure legal clarity for governments and service providers.

It also showed that almost all the social services had “economic activities” within the meaning of article 43 (freedom of establishment) and article 49 (freedom to provide services) of the former EC Treaty.

At the same time, on the 13th of January 2004, the Commission presented a proposal for a Directive – the now infamous “Bolkestein Directive” - setting out to create an internal market for services. According to the Commission, the aim of this directive was to encourage cross border economic activity in services and give a boost to competition, which would trigger an improvement in innovation and quality and bring down prices for consumers and for companies using these services. The aim was also to make it possible to improve the competitiveness of the European economy and to create jobs.
The problem with this Directive is that it encompassed all services, from distribution or construction services to health and social services. Another major sticking point was the “Country of Origin Principle” (the COP). By virtue of this principle, the service provider remains subject only to the national provisions of his country of origin, independently of the country where the service is provided. This is the example of the “Polish plumber” that was widely-quoted at the time—indeed, before Poland joined the Union—who remains “officially” attached to his country of origin, but who carries out his activity in one of the Member States, without therefore being subject to the law of the country of activity.

It met with the firm opposition of the ETUC, which expressed its objection with two large demonstrations: the first on the 19th of March 2005 in Brussels that attracted 80,000 trade unions from many European countries and the second on the 14th of February 2006, that saw 50,000 demonstrators convene before the European Parliament in Strasbourg, during the debating of this Directive in plenary session. Following these demonstrations, the Directive was modified and, above all, its scope of application reduced.

The result was the clear exclusion of:
- non economic services of general interest (NESGI);
- public and private healthcare and social services such as, for example, social housing or childcare and family services;
- gaming and lotteries;
- professions and activities linked to the exercise of the public authority (such as the notarial profession) and taxation services;
- temporary employment agencies;
- private security services.

As well as sectors already covered by a specific legislation, such as financial services, electronic communications, transport (including port services) and audiovisual services.

The following are also exempt from this directive:
- labour law;
- criminal law;
- the posting of workers.

Over and beyond these debates, it is important to point out that the organisation, conception and legal recognition of services of general interest differ within the Union.

For example, in the “Nordic” countries, the approach is more pragmatic: the service of general interest is a not a legal concept but refers to social practices, crystallised by the development of an active social policy, known as the “Welfare State”. In Germany, the concept of equal opportunities and notion of “subjective public rights” allow the setting up of services of general interest.

In Great Britain and in Ireland, services of general interest are understood to be the main network services.
The Mediterranean countries (Spain, Portugal, Italy) recognise them in their constitution whereas in Greece and in Luxembourg they tend to designate the administrative structures entrusted with the service.

In France, the public service/SGI is a strong symbol of solidarity, national identity and social cohesion.

And, for the countries that joined from 2004 onwards, the “transposition of the Community acquis” - and therefore of the texts relating to services of general interest – has introduced new concepts at national level in view of the history of most of these countries.

However, beyond this “formal” diversity, all European countries have been forced to consider that certain activities could not come under pure market rules but under specific forms of organisation and regulation in order:

– to guarantee the right of every individual to basic goods or services, such as education, health, security, transport, communications, etc.;
– to ensure economic, social and cultural cohesion;
– to build up solidarity and develop social ties and promote the general interest of the community;
– to create conditions for a development that is sustainable in economic, social and environmental terms;
– and to give due consideration for the long-term and the interest of future generations.

3. The points that are/remain under discussion and the new European legislative context

The financing of these services of general interest is one of the issues that give rise to the most heated debates. When they are recognised as being “of general interest”, certain services can thus benefit from public financing, in the form of “public service compensation”. Some therefore consider that this undermines the logic of competition and is contrary in particular to the proclaimed objectives of a “free and undistorted competition”.

But, on the other hand, the Court of Justice of the European Union has admitted several times (through the Ferring, Altmark rulings for example) that these financial payments by the State, in the form of public service compensations could not be considered/described as State aids and therefore that they were outside the control of the Commission.

This prompted the latter to “regulate” on the 13th of July 2005, these State aids in the form of “financial compensations” in a document entitled the “Monti-Altmark-Kroes package”. This document makes it possible, in particular, to raise the thresholds of notification to the Commission of certain public funds, to exclude from the notification the amounts earmarked for hospitals and social housing, and for certain air and sea connections to the islands.
The objective is to detect and rectify everything that could “distort competition”. But at the same time, it does not make it possible to truly guarantee the specific objectives carried by the SGI.

Another point under debate is that of the concept of universal service.
When a service that benefitted from a “monopoly” (telecommunications, electricity, post, etc.) opens its market to the competition, the service providers that deliver this/these service(s) must accept a certain number of obligations that set out to ensure the access of everybody, everywhere, to “certain essential services” of a high quality and at an affordable price.
This reference to “certain essential services” can be perceived as “a minimum service” to be provided, some criticising it as “a modest safeguard against unbridled liberalisation”.
At all events, others say, this notion presents a more “restrictive” and less “collective” character than that of “public service”.

Still under debate is the question of the “legal protection” of services of general interest and of the healthcare services. As once removed from the Bolkestein directive, how to ensure that they can fulfil their public service missions without being subject to the hard and fast rules of the market and competition between bodies pursuing purely lucrative goals? Is it necessary to have a “framework directive” to lay down the principles and the rules?

The new context of the Treaty on the Functioning of the European Union (TFEU) gives a few answers.
In fact, as underlined by the ETUC during the meeting of its Executive Committee, on the 1st and 2nd of June 2010, in its Resolution on public services, with the adoption of the Treaty on the Functioning of the European Union (TFEU), the former Lisbon Treaty, the situation has evolved positively, even if uncertainties nevertheless remain ...

First of all, there was the inclusion in the TFEU, of the Charter of Fundamental Social Rights. And, by virtue of its article 6 (1), the Charter of Fundamental Rights is becoming legally binding. The Charter institutes in its article 36 a right of access to SGEI in order to “promote the social and territorial cohesion of the Union”. Furthermore, several provisions of the Charter imply the existence of a mission of general interest and constitute fundamental rights that are recognised and protected by the Union. For example, the right to education (art. 14) the right of children to protection and healthcare (Art. 24.1), the right to social assistance and the right to housing (art. 34.3), the right to healthcare (art. 35), etc.

The new article 14 of the TFEU provides a legal basis. It is generally considered that article 14 does not leave the legislator of the Community any choice about the form of the action : it imposes
– the legal instrument, namely the “Regulation” and not a Directive ;
– and the legislative procedure governing its adoption, i.e. the ordinary legislative procedure.

Regulations do not grant the Member States any margin of manoeuvre when it
comes to implementation. Some may therefore think that it difficult to achieve consensus with a view to a Regulation. But for the ETUC, this is not impossible, as was demonstrated by the new Regulation on public passenger transport services by rail or road (1370/2007).

Furthermore, the new protocol (n° 26) on the SGI establishes the interpretative provisions about the shared values of the EU in respect of SGEI and confirms the broad margin of manoeuvre of the Member States in providing, commissioning, financing and organising SGEI as closely as possible to the needs of the users. Article 1 of the protocol recognises the essential role and wide discretion of national, regional and local authorities.

These three new foundations (Charter, new protocol, legal basis of article 14) of the Lisbon Treaty serve as the cornerstone for the building of a new architecture for SGI and a regulatory transversal approach concerning the SGEI, not only by making it now legally possible, but also necessary in the light of the guiding principles that are today clearly laid down in primary law (Protocol). Article 14 makes it possible to move away from a simple derogation from internal market rules to adopt a more positive attitude, taking into account the shared values incarnated by public services through the EU at a whole. Alongside article 14 of the TFEU and the new protocol, the Charter of Fundamental Rights can be used to build an authentic notion of SGI as shared values of the EU. These three new foundations impose above all a shared responsibility between the EU and the Member States in order to ensure the application of the principles inherent to public services, namely the principles of solidarity, of universal access, of equal treatment, of availability, of continuity and sustainability of quality public services and the principle of user rights. The EU must now move from the strict approach of derogation that prevailed to date to a promotional approach based on the notion of shared value, i.e. solidarity and social and territorial cohesion. It is also important to note that the Treaty grants local and regional authorities an original power of self-determination and autonomy.

4. What is the role of services of general interest in the fight against poverty and social exclusive and under what conditions do they exercise ?

Services of general interest are part of the values shared by all European societies and are an essential feature of the European social model. Their role is capital to improve quality of life of all citizens and to fight against social exclusion and isolation.

And, in particular, the social services of general interest (SSGI) play a crucial role by participating in the accomplishment of the primordial objectives of the European Union such as social, economic and territorial cohesion.
Trade unions and the fight against poverty and social exclusion

For the ETUC, services of general interest (SGI), and the social services of general interest (SSGI) in particular, play an essential role in the fight against poverty and social exclusion. Within the EU, they also play a crucial role in improving quality of life and access to social protection. They cover:

– social security;
– employment and training services;
– social housing;
– childcare;
– long-term care;
– social assistance services.

However, certain conditions must be fulfilled.

For the ETUC, one is a prerequisite: they must not be provided only to the poor and excluded, but to a wide spectrum of society, aimed at achieving solidarity and social and territorial cohesion. For example in an ageing society, poorer and older people need reliable care. Social services are crucial to maintaining their inclusion in society.

Another important condition concerns the quality of these services. The ETUC has always fought for high quality SSGI, which implies that the specific nature of objectives pursued by the SSGI cannot be made subject solely to the laws of the internal market. For the ETUC, the majority of these services “cannot be classified as economic activities under the terms of the Treaty, i.e. they cannot be made subject to competition regulations. If this were the case, conflicts would arise between the social objectives pursued by these services and competition law”.

The quality of social services must therefore be the major concern of the public authorities, of the service providers, of users and other stakeholders. With this in mind, the Social Protection Committee proposes the setting up of a “voluntary framework for the quality of social services” supplying “orientations on the way of establishing, supervising and evaluating the quality standards”. This initiative is part of a strategy that includes financing (thanks to the PROGRESS programme) of transnational projects, with a bottom-up approach, in order to develop mechanisms to develop, measure, evaluate and improve the quality of social services.

But at the same time, this quality implies that the staff that dispense these services are sufficiently trained, correctly remunerated and benefit from decent working conditions.

21. The Social Protection Committee is an organ of the Council - just like the Employment Committee or the Economic Policy Committee – that was set up in 2000 and that brings together the Social Security policymakers of the various Member States. It deals with subjects touching on social policy within the Union. Before its creation, these questions were, mainly, handled within the Economic Policy Committee;
These services are also primordial to achieve the fundamental objectives of the EU such as social, economic and territorial cohesion, a high level of employment, social inclusion and economic growth. The EU must encourage cooperation and exchange of good practices between the countries of the EU in order to improve the quality of social services, and must provide the financial support necessary for their development and their modernisation (thanks to the European social fund, for example).

In order to modernise the social services and to make them better adapted to the constantly evolving needs, to societal challenges (the ageing of the population, for example) and the financial constraints, the national authorities must further diversify the way in which these services are organised, supplied and financed (greater decentralisation, sub-contracting of certain tasks to private service providers, whether profitmaking or non profitmaking). Consequently, a growing number of these services cannot and must not enter into the field of application of the Community rules governing competition and the internal market.

Finally, another essential element that ensures that the SGI and the SSGI in particular make an effective contribution to the fight against social exclusion and against poverty, concerns their availability and their accessibility, both financial and geographical. They must be reinforced in order to:

- promote social and territorial cohesion;
- guarantee the effective exercise of fundamental rights;
- and guarantee a decent existence, in particular for the vulnerable and underprivileged groups of society.

5. What trade union strategies must be developed for the ETUC and its organisations?

The ETUC is convinced that the new article 14, along with the new protocol, is a call for action. It is unacceptable that the Commission continues to refuse to act. The ETUC requests the Commission to formulate a legislative proposal on the basis of the new article 14. The previous request for a “framework directive” that was based on the rules of the internal market (article 114) is now replaced by the new request for a regulation(s).

The contents of this kind of Regulation should reinforce the “public service mission” of public services and stipulate that (1) the power of definition is incumbent on the appropriate local, regional and national public authorities, (2) the exercise of this freedom of appreciation should not be questioned in any legal procedure except in the event of clear error, and (3) the burden of proof should be incumbent on the European Commission or another plaintiff and not the local or regional or national authority. It is possible to consider further provisions. The rules of subsidiarity are important to create a balance between the public services created at national level and the European rules governing competition and the internal market. The Member States have a broad discretionary power, reinforced by the new Treaty, to define the mis-
sions and obligations of general interest. It is time to bring the curtain down on an era in which the Commission was indifferent to the levels of regional and local organisation, favouring the market and competition over regional and local governance.

Alongside the Regulations, the Member States and the local and regional public authorities can (at the appropriate level) set up a register of non-economic services of general interest, which are excluded from the application of the Community rules on the provision of services, on competition and State aids. This twin-track approach offers the advantage of making it possible to give due consideration to the diversity of national traditions, cultures, values, etc. and a Member State with an ambitious definition of public services can draw up a vaster list than a Member State with less ambition. Unanimity would no longer be necessary and it would avoid a situation whereby a Member State would be in a situation to put the spokes in the wheel of all progress. The register can be updated whenever necessary.

The Member States have the competence to provide, commission and finance Services of General Economic interest (SGEI). Given that this competence is shared with the institutions of the EU, currently the legal uncertainty and insecurity are considerable, making it necessary to clarify the conditions of implementation in the regulations, namely:

– the conditions making it possible to define the SGI, the SGEI, the non-economic SGI and the social services of general interest (SSGI) – with regard the definition competence of the Member States. It is also necessary to clarify the conditions governing “specific tasks”, their methods of implementation and the methods of designating the operators;

– the definition of their forms of organisation – under which conditions can exclusive or special rights be decided, and more generally, what type of derogations can be applied to the rules laid down in the Treaties, the conditions governing the choice of management methods (“in-house”), and the conditions of cooperation of the activities and/or services between the local public authorities;

– the financing of the SGEI – in particular from the point of view of the application of the rules on the monitoring of State aids, within the context of a revision of the “Altmark” package (of November 2005). It is necessary to better define the compensations that do not come under the provisions of the treaty on State aids.

The guiding principles governing public services must be the safeguarding of an excellent quality, continuity and security, equality of access, affordable prices, universal supply, transparency and high quality jobs.

And as it has already been pointed out, these services must not only be governed by the commercial rules of the free market, because that would mean that the weakest and the poorest will always lose out. Similarly, it is not wise for the missions and responsibilities of the public services to be defined on an ad hoc basis by the jurisprudence of the Court of Justice of the European Union, given the fact that the rulings vary according to individual circumstances.
and offer no guarantee of continuity. The responsibility in the field of public services is shared between the European and national authorities and, consequently, a European framework is necessary in order to support regional and social cohesion.

For the ETUC, it is important that users, trade unions and consumers are consulted and are stakeholders in methods of regulation, and that involvement and consultation of workers and their representatives within the context at every level is affirmed.

However, spurred on by this battle in favour of quality services, the ETUC has every intention of exploiting the dynamic generated by “2010, European Year for Combating Poverty and Social Exclusion” at European level and at national level through its organisations, most of which are already committed, to develop or even to use more specific actions. It will do so in conjunction with its usual partners from civil society, such as the European Anti-Poverty Network (EAPN) or the European Disability Forum (EDF), with regard to the disabled.

These initiatives and mobilisations can relate for example:
- to the setting up, Europe-wide, through the appropriate measures, of a guaranteed decent income for everyone, i.e. an income that allows the beneficiary to emerge from the risk of poverty, and financed within the framework of solidarity, with an explicit contribution from the wealthiest and by finding new resources, in particular by taxing revenues that are today exempt;
- to the access to employment and training of those who are today excluded from it, in particular via the implementation of the agreement signed by the European social partners, on the 25th of March 2010, entitled “Achieving an inclusive labour market”.

Finally, at national level, it is essential for the trade unions to evaluate the impact of liberalisation and the privatisation of services of general interest, and in particular of social services, on the quality, accessibility and availability of services.

**Pour en savoir plus :**
- [http://ec.europa.eu/services_general_interest/index_fr.htm](http://ec.europa.eu/services_general_interest/index_fr.htm)
- [http://europa.eu/scadplus/glossary/general_interest_services_fr.htm](http://europa.eu/scadplus/glossary/general_interest_services_fr.htm)
- [http://www.etuc.org/a/6775](http://www.etuc.org/a/6775)
- [http://www.etuc.org/a/316](http://www.etuc.org/a/316)
Methodology note for trade union trainers

In the context of “2010: year for combating poverty and social exclusion” in Europe, ETUI has developed the present guide as a tool in trade union current training European and national level activity, addressing to all member organisations. The recent economic crisis brought to the foreground the problem of poverty and social exclusion as main issues to be in attention of trade union movement, considering that rates have reached alarming level in Europe and are still growing. This topic was included in the offer of trade union education in order to increase participants’ awareness of its importance and to develop sustainable action plans not only at European level, but also nationwide, ready to be enforced by each member organisation.

This material is aiming to be an added value to each national trade union training approach and is cumulating knowledge, competence and practical experience in the field of trade union movement and education, all designed by a team of trainers and experts, working under the guidance of ETUI Education Department.

The guide is designed on a specific pedagogical approach resulting mainly from carrying out European-level training activities. It will be the task of the trade union trainers to adapt it to their needs, according to the characteristics of own organisation, in what’s regarding national trade union organisation reality, culture, the target group and the training objectives. Running national-type training initiatives by using the different training materials provided by this guide, requires adjustment, in order to coordinate with each national trade union training system.

This guide is also a way to enable trade union trainers to develop similar activities on common interest trade union topics. It should not be seen as a standard curriculum, but a sum of flexible activities, which can be adapted according to the needs expressed by the organisations or the participants. The different scenarios suggested by this training material are guidelines, not a general valid prescription, so they can only be used as such.

The training guide can be summarised in 3 points:

– a methodology note for the trainers. This note attempts to make good use of the experience of the trainers, at national or European level. It may be useful to trade union trainers for preparing training courses on these topics;
– an initial general approach, in the form of information sheets, explaining the general modi-operandi, relating to the topic of poverty and social exclusion, particularly at European level;
– a second, more specific approach, in the form of training activities, aimed at gaining a better understanding of the problems and issues underlying the different aspects of the social protection systems faced with poverty and social exclusion.
The guide is summarising the experts’ experience in the form of the informational aspects of the topic, synthesized to the essential issues to be presented to the participants, the necessary that can enable them to understand the European context regarding poverty and social exclusion and to place in it the national realities, the different trade union organisations’ positions and actions. The information provided by experts, as minimum required, was shaped by a team of Eurotrainers, according to adult education principles, in concrete training sequences, containing all the pedagogical elements, ready to be used by trade union trainers, in their seminars, at European and national level.

A model of training methodology

The guide was developed using the preferred ETUI pedagogical approach, a variant of training methodology already in use from many years in ETUI seminars and improved by the contribution of trainers working with different training systems, in correlation with current trend of adult education. This pedagogical perspective of the guide can be adjusted to different national trade union training systems, considering that it has the advantage to be designed according to general principles of lifelong learning, compatible with other pedagogical approaches in use at national organisations level and possible to apply to different training topics.

The pedagogical approach is centered on objectives, as core of pedagogical structure and participants, as active subjects of own personal development during the training.

The training process is planned and implemented on the direction of development of knowledge, competences and attitudes of participants, step by step, focusing on the formative and practical-applicative aspect of knowledge and not on their exclusive information side.

Working with experience

The pedagogical approach underlying the guide is designed to use previous experience of participants to develop their own training process. The information provided during the training is aiming to keep the participants up to date on a specific trade union topic or to provide new dates on social field, but it is used also as an excuse to invite them to bring their own contribution to the seminar with the knowledge and skills they possess, and with their experience regarding the subject of seminar. Sharing experience and exchange of good and bad practices are modalities to develop existing competences, to bring new perspectives on topic and different ways to approach the trade union main issues.

Contrary to formal education, the training process is a personal path, developed individually by each participant, according to own background, interests and learning profile. For this reason, the pedagogical approach promoted by this guide is centered on participants equally as on training objectives. The aims of training process are reflecting the target group’s needs, the area that is
necessary to be improved regarding knowledge, competence and awareness. These aims can be achieved by providing more time for participants’ activity than for experts’ presentations, in order to give them the opportunity to explore both personal and group’s experience on the topic, to exchange practices, to actually work with the new received information and skills during the seminar and to create motivation for individual continuity of the process initialized under the guidance of trainers.

To better design and run a training seminar it is essential to have a general overview on participants’ trade union and personal background. Therefore, the enrolment forms and preparatory works are necessary tools to be used by trade union trainers in the process of planning and preparing the training.

Working with participants’ experience has as main purpose the awareness regarding the trade union movement’s problems and a change of paradigm in trade unionists’ attitude, in order to strengthen the organisations’ position as social partner and to increase the influence they have on a continuous changing social-economic and politic context.

**The trade union training specificity**

As part of lifelong learning, the trade union education is based on the same principles, but goes beyond this, presenting a number of specific characteristics. Perhaps more than any professional training, trade union education is permanently aware of changes in adult education, as an essential condition to face a constantly evolving and changing context. Only a high standard training, updated to the current situation, can enable trade unions to provide quality services for members and meet the increasingly diverse and complex needs of organizations.

The specificity of trade union training is not only on the design of training and increasingly high standards competencies required, but also on the characteristics of topics developed in the seminars. The trade union activity is demanding diverse areas of competence and for this reason the topics of training seminars are very diverse as well. The social context is complex and requires knowledge and skills on various professional fields, so the trade union training has the task to respond to this need by an extended educational offer and, in the same time, by a flexible one, according to its evolution.

Another characteristic of trade union education is referring to the beliefs and attitudinal area to which is addressing. Trade union training is about not only information and skills in social field, but more about a specific perspective and position of trade union movement in the structure of social dialog. Education is an important part of trade union’s strategy as main tool for organisational development and increase of activity’s efficiency. This is an aspect for trade union trainers to be aware of. In a context where the information means power, the competence is the key to access the position corresponding to the role of trade union as active and responsible social partner, ready, every time necessary, for decision making and complex, effective actions.

As a consequence of this training context, trainers must be at the same high professional level in terms of training standards. A permanent professional
development and update of training knowledge and competence is a must for each trade union trainer, as well as proactive attitude.

The present guide is an example of all above-mentioned training requirements, in terms of flexibility, adaptive capacity, portability of information and skills, as well as interdisciplinary perspective, all in a cumulative, complex, general interest and essential social topic as combating poverty and social exclusion.

**How to use this guide**

The structures of training seminars presented here are only guiding lines and can be adapted to the training needs inside affiliated organisations, according to the trainer’s decision as pedagogical concept.

The suggested seminars have, as all the Trade Union training courses, two standard sequences (the opening session and the evaluation session) that are not described from pedagogical perspective, because they are fixed moments, implemented in similar way for all the topics approached. These two sequences are aiming precise aspects like: presentation of aims and programme of the course, presentation of participants and trainers and final evaluation of seminar (oral and written).

The trainers have the freedom to develop the opening and the evaluation sessions in a creative way, considering the large variety of techniques available and to make the most appropriate choice, according the specificity of the group and organisation.

For the Application moments involving a group or an individual activity, we suggest the use of the activity sheet, a pedagogical tool that proved efficiency during the vast ETUI training practice. The following structure of an activity sheet is the result of a pedagogical decision and subject of an ongoing improvement process developed by the ETUI trainers.

**Designing an activity sheet contains:**

- aim (generally a pedagogical objective);
- tasks (made clear, concise, the second person of plural, expressing the requirement addressed to the participants);
- report (explanation regarding the report-back after the group work)
- time (work time and report-back time);
- resources (materials needed in activity).
Example: a model used for designing activity sheets

<table>
<thead>
<tr>
<th>Seminar subject Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objectives:</td>
</tr>
<tr>
<td>– To familiarise participants with the subject of the course</td>
</tr>
<tr>
<td>– To synthesise the characteristics of national income systems</td>
</tr>
<tr>
<td>– To contribute to the work which will be carried out during the course</td>
</tr>
<tr>
<td>Task:</td>
</tr>
<tr>
<td>Before arriving at the seminar, you will be asked to prepare a short presentation in order to inform the other participants about your national revenue system in a consistent manner.</td>
</tr>
<tr>
<td>Report:</td>
</tr>
<tr>
<td>The material will be used during the seminar for group work.</td>
</tr>
<tr>
<td>Timing:</td>
</tr>
<tr>
<td>To be prepared before the seminar.</td>
</tr>
<tr>
<td>You will have 7-10 minutes to present your report on the situation in your country.</td>
</tr>
<tr>
<td>Resources:</td>
</tr>
<tr>
<td>– Activity sheet</td>
</tr>
<tr>
<td>– Personal experience</td>
</tr>
</tbody>
</table>

This training tool is the response to a pedagogical need for systematisation and standardisation of Trade Union education activity. Just as any pedagogical tool, the activity sheet is open to improvement and future development, according to specific evolution of Trade Union educational principle.

Multicultural aspects in Trade Union Training

During the seminar and especially for opening and evaluation sessions, trainers should pay a special attention to the multicultural aspects of training. Working with interpreters requires an added competence for the trainers providing European level courses, as well as developing the group work in a multicultural training environment, according to languages available for interpretation. All the educational or informational materials used in the seminar need to be available in the working languages, in order to provide access to all the participants.

The multicultural group requires a specific pedagogical approach, designed to overcome the possible issues related to language or cultural differences, but also to use the various Trade Union cultures present in the group for the benefit of training process.

The opening session is an essential moment from multicultural perspective, because it is the first connection established between the trade unionists coming from various cultural environments. The group members need to be aware of differences, but also common aspects regarding the Trade Union experience. The following group activities are aiming also to link the Trade Union cultures on the basis of common objectives and complementary approaches, in order to develop the Trade Union networking among the national organisations. The training process has to build a bridge on all these multicultural elements and provide, at the end of the training, a complete functioning group, able to produce and to work together as a whole and not just as sum of individuals. The multicultural training group is a rich experiential environment, able to
provide complex educational opportunities and exchange of Trade Union good practices. It’s the pedagogical tact of the trainer that has to extract the maximum training benefits for the participants. For this reason, it is important to have complete overview regarding the Trade Union cultures in the group since the phase of training definition and design.

The present guide, as support material for trainers of affiliated organisations, plans to meet the need for pedagogical coherence and methodological articulation of Trade Union education, despite the national training tradition or Trade Union cultural diversity. These are essential elements for European identity of Trade Union training methodology, strengthening the Trade Union education as an active contribution component, working toward the accomplishment of organisations’ social mission.
Chapter 1
training activities

Income distribution in the fight against poverty.

<table>
<thead>
<tr>
<th>Training objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>– To compare national and European perspectives on income distribution</td>
</tr>
<tr>
<td>– To familiarise participants with the concepts of poverty, social exclusion and income distribution</td>
</tr>
<tr>
<td>– To raise participants' awareness of the role and effectiveness of income distribution in the fight against poverty</td>
</tr>
<tr>
<td>– To synthesise the main problems and questions concerning income distribution raised at national and European level</td>
</tr>
<tr>
<td>– To analyse the trade union strategies which have been developed to improve the quality of income distribution</td>
</tr>
<tr>
<td>– To familiarise participants with the ETUC position on income distribution in the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td>– To contribute to strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Target Group</th>
<th>Trade unionists dealing with income questions, education officers and trainers</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment of participants:</td>
</tr>
<tr>
<td>Initial assessment (participants' experience of the subject)</td>
</tr>
<tr>
<td>Formative assessment (observation, written assessment, reciprocal assessment, self-assessment)</td>
</tr>
<tr>
<td>Summative assessment (individual/national action plan)</td>
</tr>
<tr>
<td>Assessment of seminar:</td>
</tr>
<tr>
<td>Assessment questionnaire for participants</td>
</tr>
<tr>
<td>Assessment by the course team</td>
</tr>
</tbody>
</table>

**Preliminary work by participants**

This activity is based on a questionnaire sent to participants before the course, and preliminary work enabling them to prepare for group work and acquire familiarity with the subject. The preliminary work is based on knowledge of their own national systems and consists of a presentation of the national income system. The questionnaire and the work sheet for the preliminary work will be sent out to participants along with confirmation of their attendance on the course.
Trade unions and the fight against poverty and social exclusion

Objectives:
- To familiarise participants with the subject of the course
- To synthesise the characteristics of national income systems
- To contribute to the work which will be carried out during the course

Task:
Before arriving at the seminar, you will be asked to prepare a short presentation in order to inform the other participants about your national revenue system in a consistent manner.

Report:
The material will be used during the seminar for group work.

Timing:
To be prepared before the seminar.
You will have 7-10 minutes to present your report on the situation in your country.

Resources:
- Activity sheet
- Personal experience

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### Three-day course programme (18 hours)

<table>
<thead>
<tr>
<th>Time</th>
<th>First day</th>
<th>Second day</th>
<th>Third day</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Opening</strong></td>
<td><strong>3. The role and effectiveness of income distribution in the fight against poverty and social exclusion.</strong></td>
<td><strong>6. The ETUC position on income distribution in the fight against poverty and social exclusion.</strong></td>
</tr>
<tr>
<td></td>
<td>Course objectives</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Participants</td>
<td>- Group work</td>
<td>- Presentation by expert</td>
</tr>
<tr>
<td></td>
<td>- Programme and working method</td>
<td></td>
<td>- Debate</td>
</tr>
<tr>
<td>09.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30*</td>
<td><strong>Coffee break</strong></td>
<td><strong>Coffee break</strong></td>
<td><strong>Coffee break</strong></td>
</tr>
<tr>
<td>12.30</td>
<td><strong>1. Introduction</strong></td>
<td><em><em>30</em> Coffee break</em>*</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The concepts of poverty, social exclusion and income distribution</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Group work</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>- Group reports</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Discussion</td>
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<tr>
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</tr>
<tr>
<td>12.30</td>
<td><strong>Lunch</strong></td>
<td><strong>Lunch</strong></td>
<td></td>
</tr>
<tr>
<td>14.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.00</td>
<td><strong>2. National and European situations regarding income distribution</strong></td>
<td><strong>4. The main problems and questions concerning income distribution raised at national and European level</strong></td>
<td><strong>Group reports</strong></td>
</tr>
<tr>
<td></td>
<td>- Group work</td>
<td>- Presentation by expert</td>
<td>- Discussion</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Debate</td>
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<tr>
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</tr>
<tr>
<td>30*</td>
<td><strong>Coffee break</strong></td>
<td><strong>Coffee break</strong></td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
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</tr>
<tr>
<td>17.30</td>
<td>End of the day</td>
<td>End of the day</td>
<td>Departure of participants</td>
</tr>
<tr>
<td>19.00</td>
<td>Dinner</td>
<td>Dinner</td>
<td>Dinner</td>
</tr>
</tbody>
</table>
### Training sequence 1 - Introduction

**Training objective of the sequence**: To familiarise participants with the main concepts involved in the subject of poverty and social exclusion

**Secondary objectives**:
- To raise participants' awareness of the impact of poverty and social exclusion in the lives of workers
- To identify the basic elements of poverty and social exclusion in the trade union context
- To analyse the question of poverty and social exclusion in the European and international context

**Pedagogical approaches**:
- RAISING AWARENESS by brainstorming
- THEORETICAL PART, presentation by expert
- APPLICATION in group work

**Methods and techniques**:
- We propose:
  - ACTIVE METHOD for awareness-raising (group work)
  - AFFIRMATIVE METHOD for theoretical part, expert presentation
  - ACTIVE METHOD for application (debate)

**Resources**:
- Expert Guide (An introduction defining the concept of poverty in ILO, international, European and national contexts, and the ETUC position; social categories at risk of poverty; methods of identifying poverty levels; fundamental aspects causing poverty; aspects influencing the level of poverty represented in the following chapters)
  - Introduction: What do we mean by poverty and social exclusion?
  - PPT presentation/flipchart:
  - Participants' experience
  - Activity sheet

**Duration**: 2-3 hours

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### Training sequence 2 - National and European situations regarding income distribution

**Training objective of the sequence**: To compare national and European situations regarding income distribution

**Secondary objectives**:
- To raise participants' awareness of the different national and European situations regarding income distribution
- To identify national and European situations regarding income distribution
- To compare national situations regarding income distribution in the European context

**Pedagogical approaches**:
- RAISING PARTICIPANTS' AWARENESS in group work
- THEORETICAL PART, presentation by expert
- APPLICATION in debate

**Methods and techniques**:
- We propose:
  - ACTIVE METHOD for awareness-raising (group work)
  - AFFIRMATIVE METHOD for theoretical part, expert presentation
  - ACTIVE METHOD for application (debate)

**Resources**:
- Expert Guide (The minimum wage in EU countries, Taxation in the EU)
  - PPT presentation/flipchart:
  - Participants' experience
  - Activity sheet

**Duration**: 2-3 hours
## Training sequence 3 - The role and effectiveness of income distribution in the fight against poverty and social exclusion

**Training objective of the sequence**
- To raise participants’ awareness of the role and effectiveness of income distribution in the fight against poverty and social exclusion

**Secondary objectives**
- To raise participants’ awareness of the role and effectiveness of income distribution in the fight against poverty and social exclusion
- To identify the basic elements of income distribution in the fight against poverty and social exclusion
- To analyse the role and effectiveness of income distribution in the fight against poverty and social exclusion in the trade union context

**Pedagogical approaches**
- RAISING PARTICIPANTS’ AWARENESS in group work
- THEORETICAL PART, presentation by expert
- APPLICATION in debate

**Methods and techniques**
- We propose:
  - ACTIVE METHOD for awareness-raising (group work)
  - AFFIRMATIVE METHOD for theoretical part, expert presentation
  - ACTIVE METHOD for application (debate)

**Resources**
- Expert Guide (Tension between labour and capital in income distribution, Income distribution and wealth)
- PPT presentation/flipchart:
- Participants’ experience
- Activity sheet

**Duration**
- 1h30 - 2 hours

## Training sequence 4
The main problems and questions concerning income distribution raised at national and European level

**Training objective of the sequence**
- To synthesise the main problems and questions concerning income distribution raised at national and European level

**Secondary objectives**
- To raise participants’ awareness of the impact of the main problems and questions concerning income distribution raised at national and European level
- To identify the main problems and questions concerning income distribution raised at national and European level
- To synthesise the main problems and questions concerning income distribution raised at national and European level in the trade union context

**Pedagogical approaches**
- RAISING AWARENESS by Q&A
- THEORETICAL PART, presentation by expert
- APPLICATION in debate

**Methods and techniques**
- We propose:
  - INTERACTIVE METHOD for raising awareness (Q&A)
  - AFFIRMATIVE METHOD for theoretical part, expert presentation
  - ACTIVE METHOD for application (debate)

**Resources**
- Expert Guide (Social inequalities, Labour market and poverty, Emergence of new forms of poverty?)
- PPT presentation/flipchart:
- Participants’ experience
- Activity sheet

**Duration**
- 1h - 1.30 hours
### Training sequence 5 - Trade union strategies which have been developed to improve the quality of income distribution

**Training objective of the sequence**  
To analyse the trade union strategies which have been developed to improve the quality of income distribution.

**Secondary objectives**  
- To raise participants' awareness of the trade union strategies which have been developed to improve the quality of income distribution.  
- To identify good practices in the trade union strategies which have been developed to improve the quality of income distribution.  
- To analyse the trade union strategies which have been developed to improve the quality of income distribution.

**Pedagogical approaches**  
RAISING AWARENESS by Q&A  
THEORETICAL PART, presentation by expert  
APPLICATION in debate

**Methods and techniques**  
We propose:  
INTERACTIVE METHOD for raising awareness (Q&A)  
AFFIRMATIVE METHOD for theoretical part, expert presentation  
ACTIVE METHOD for application (debate)

**Resources**  
Expert Guide  
PPT presentation/flipchart: Income redistribution or what should be done to reduce poverty and social exclusion, thus promoting social cohesion?  
Participants' experience  
Activity sheet

**Duration**  
1h30 - 2 hours

### Training sequence 6 - The ETUC position on income distribution in the fight against poverty and social exclusion

**Training objective of the sequence**  
To define the ETUC position on income distribution in the fight against poverty and social exclusion.

**Secondary objectives**  
- To raise participants' awareness of the impact of the ETUC position on income distribution in the fight against poverty and social exclusion.  
- To define the ETUC position on income distribution in the fight against poverty and social exclusion.  
- To analyse the ETUC position on income distribution in the fight against poverty and social exclusion.

**Pedagogical approaches**  
RAISING AWARENESS by Q&A  
THEORETICAL PART, presentation by expert  
APPLICATION in debate

**Methods and techniques**  
We propose:  
INTERACTIVE METHOD for raising awareness (Q&A)  
AFFIRMATIVE METHOD for theoretical part, expert presentation  
ACTIVE METHOD for application (debate)

**Resources**  
Expert Guide  
PPT presentation/flipchart: Income redistribution or what should be done to reduce poverty and social exclusion, thus promoting social cohesion?  
Participants' experience

**Duration**  
1h - 1.30 hours
### Training sequence 7
#### The national trade union action plan on income distribution in the fight against poverty and social exclusion

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
<th>— To contribute to strengthening social cohesion and trade union solidarity throughout Europe in the fight against poverty and social exclusion</th>
</tr>
</thead>
</table>
| Secondary objectives              | — To raise participants' awareness of the importance of strengthening social cohesion and trade union solidarity throughout Europe in the fight against poverty and social exclusion  
— To identify the basic elements of a national trade union action plan on income distribution in the fight against poverty and social exclusion.  
— To synthesise a national trade union action plan on income distribution in the fight against poverty and social exclusion. |
| Pedagogical approaches            | RAISING PARTICIPANTS’ AWARENESS in group work  
THEORETICAL PART, presentation by expert  
APPLICATION in debate |
| Methods and techniques            | We propose:  
ACTIVE METHOD for awareness-raising (group work)  
AFFIRMATIVE METHOD for theoretical part, expert presentation  
ACTIVE METHOD for application (debate) |
| Resources                         | Expert Guide (On the necessity and urgency of action)  
PPT presentation/flipchart: Participants' experience  
Activity sheet |
| Duration                          | 1h30 - 2 hours |
Chapter 2 training activities

The minimum wage in Europe

<table>
<thead>
<tr>
<th>Training objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>– To compare national and European perspectives on the minimum wage</td>
</tr>
<tr>
<td>– To familiarise participants with the concepts of poverty, social exclusion, minimum wage and income distribution</td>
</tr>
<tr>
<td>– To raise participants’ awareness of the role and effectiveness of the minimum wage in Europe in the fight against poverty and social exclusion</td>
</tr>
<tr>
<td>– To synthesise the main problems and questions concerning the minimum wage raised at national and European level</td>
</tr>
<tr>
<td>– To analyse the trade union strategies which have been developed to improve the quality of the minimum wage in Europe</td>
</tr>
<tr>
<td>– To familiarise participants with the ETUC position on the minimum wage in the fight against poverty and social exclusion</td>
</tr>
<tr>
<td>– To contribute to strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion</td>
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</tbody>
</table>

<table>
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<tr>
<th>Target Group</th>
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<td>Trade unionists dealing with income questions, education officers and trainers</td>
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<tr>
<td>Assessment of participants:</td>
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<td>Summative assessment (individual/national action plan)</td>
</tr>
<tr>
<td>Assessment of seminar:</td>
</tr>
<tr>
<td>Assessment questionnaire for participants</td>
</tr>
<tr>
<td>Assessment by the course team</td>
</tr>
</tbody>
</table>

Preliminary work by participants
This activity is based on a questionnaire sent to participants before the course, and preliminary work enabling them to prepare for group work and acquire familiarity with the subject. The preliminary work is based on knowledge of their own national systems and consists of a presentation of the national income system. The questionnaire and the work sheet for the preliminary work will be sent out to participants along with confirmation of their attendance on the course.
Trade unions and the fight against poverty and social exclusion

Seminar subject

Date:

Objectives:
– To familiarise participants with the subject of the course
– To synthesise the characteristics of national income systems
– To contribute to the work which will be carried out during the course

Task:
Before arriving at the seminar, you will be asked to prepare a short presentation in order to inform the other participants about your national income system in a consistent manner.

Report:
The material will be used during the seminar for group work.

Timing:
To be prepared before the seminar.
You will have 7-10 minutes to present your report on the situation in your country.

Resources:
– Activity sheet
– Personal experience

Three-day course programme (18 hours)

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<th>Third day</th>
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<td></td>
<td><strong>Opening</strong></td>
<td><strong>3. The role and effectiveness of the minimum wage in Europe in the fight against poverty and social exclusion</strong></td>
<td><strong>6. The ETUC position on the minimum wage in the fight against poverty and social exclusion.</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Course objectives</strong></td>
<td><strong>Group work</strong></td>
<td><strong>Presentation by expert</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Presentations:</strong></td>
<td><strong>Debate</strong></td>
<td><strong>Debate</strong></td>
</tr>
<tr>
<td></td>
<td>– Participants</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>– Programme and working method</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09:00</td>
<td><strong>1. Introduction</strong></td>
<td><strong>Group reports</strong></td>
<td><strong>7. National trade union action plan on the minimum wage in the fight against poverty and social exclusion.</strong></td>
</tr>
<tr>
<td></td>
<td><strong>The concepts of poverty, social exclusion, the minimum wage and income distribution</strong></td>
<td><strong>Discussion</strong></td>
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</tr>
<tr>
<td></td>
<td>– Group work</td>
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<td></td>
<td>– Group reports</td>
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<td></td>
<td>– Discussion</td>
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<tr>
<td>12:30</td>
<td><strong>12.30</strong></td>
<td><strong>14.00</strong></td>
<td><strong>17.30</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Lunch</strong></td>
<td><strong>2. National and European situations regarding the minimum wage</strong></td>
<td><strong>End of the day</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Group work</strong></td>
<td><strong>Course assessment</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Presentation by expert</strong></td>
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<td><strong>Debate</strong></td>
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<td></td>
<td><strong>Discussion</strong></td>
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<tr>
<td>14:00</td>
<td><strong>30</strong></td>
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<tr>
<td></td>
<td><strong>Coffee break</strong></td>
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<td></td>
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</tr>
<tr>
<td>17:30</td>
<td><strong>End of the day</strong></td>
<td><strong>End of the day</strong></td>
<td><strong>Departure of participants</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Dinner</strong></td>
<td></td>
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</tr>
<tr>
<td>19:00</td>
<td><strong>Dinner</strong></td>
<td></td>
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</tr>
</tbody>
</table>
## Trade unions and the fight against poverty and social exclusion

### Training sequence 1 - Introduction

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
<th>-- To familiarise participants with the main concepts involved in the subject of poverty and social exclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary objectives</td>
<td>-- To raise participants' awareness of the impact of poverty and social exclusion in the lives of workers.</td>
</tr>
<tr>
<td></td>
<td>-- To identify the basic elements of poverty and social exclusion in the trade union context</td>
</tr>
<tr>
<td></td>
<td>-- To analyse the question of poverty and social exclusion in the European and international context</td>
</tr>
<tr>
<td>Pedagogical approaches</td>
<td>RAISING AWARENESS by brainstorming</td>
</tr>
<tr>
<td></td>
<td>THEORETICAL PART, presentation by expert</td>
</tr>
<tr>
<td></td>
<td>APPLICATION in group work</td>
</tr>
<tr>
<td>Methods and techniques</td>
<td>We propose:</td>
</tr>
<tr>
<td></td>
<td>INTERACTIVE METHOD for raising awareness (brainstorming)</td>
</tr>
<tr>
<td></td>
<td>AFFIRMATIVE METHOD for theoretical part, expert presentation</td>
</tr>
<tr>
<td></td>
<td>ACTIVE METHOD for application (group work)</td>
</tr>
<tr>
<td>Resources</td>
<td>Expert Guide (An introduction defining the concept of poverty in ILO, international, European and national contexts, and the ETUC position; social categories at risk of poverty; methods of identifying poverty levels; fundamental aspects causing poverty; aspects influencing the level of poverty represented in the following chapters)</td>
</tr>
<tr>
<td></td>
<td>(Concepts and definitions)</td>
</tr>
<tr>
<td></td>
<td>PPT presentation/flipchart:</td>
</tr>
<tr>
<td></td>
<td>Participants' experience</td>
</tr>
<tr>
<td></td>
<td>Activity sheet</td>
</tr>
<tr>
<td>Duration</td>
<td>2-3 hours</td>
</tr>
</tbody>
</table>

### Training sequence 2 - National and European situations regarding social protection

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
<th>-- To compare national and European situations regarding social protection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary objectives</td>
<td>-- To raise participants' awareness of the different national and European situations regarding social protection</td>
</tr>
<tr>
<td></td>
<td>-- To identify national and European situations regarding social protection</td>
</tr>
<tr>
<td></td>
<td>-- To compare national situations regarding social protection in the European context</td>
</tr>
<tr>
<td>Pedagogical approaches</td>
<td>RAISING PARTICIPANTS' AWARENESS in group work</td>
</tr>
<tr>
<td></td>
<td>THEORETICAL PART, presentation by expert</td>
</tr>
<tr>
<td></td>
<td>APPLICATION in debate</td>
</tr>
<tr>
<td>Methods and techniques</td>
<td>We propose:</td>
</tr>
<tr>
<td></td>
<td>ACTIVE METHOD for awareness-raising (group work)</td>
</tr>
<tr>
<td></td>
<td>AFFIRMATIVE METHOD for theoretical part, expert presentation</td>
</tr>
<tr>
<td></td>
<td>ACTIVE METHOD for application (debate)</td>
</tr>
<tr>
<td>Resources</td>
<td>Expert Guide (The situation in Europe)</td>
</tr>
<tr>
<td></td>
<td>PPT presentation/flipchart:</td>
</tr>
<tr>
<td></td>
<td>Participants' experience</td>
</tr>
<tr>
<td></td>
<td>Activity sheet</td>
</tr>
<tr>
<td>Duration</td>
<td>2-3 hours</td>
</tr>
</tbody>
</table>
## Training sequence 3 - The role and effectiveness of social protection in the fight against poverty and social exclusion

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
<th>To raise participants' awareness of the role and effectiveness of social protection in the fight against poverty and social exclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary objectives</td>
<td>To raise participants' awareness of the role and effectiveness of social protection in the fight against poverty and social exclusion. To identify the basic elements of the role and effectiveness of social protection in the fight against poverty and social exclusion. To analyse the role and effectiveness of social protection in the fight against poverty and social exclusion in the trade union context</td>
</tr>
<tr>
<td>Pedagogical approaches</td>
<td>RAISING PARTICIPANTS' AWARENESS in group work THEORETICAL PART, presentation by expert APPLICATION in debate</td>
</tr>
<tr>
<td>Methods and techniques</td>
<td>We propose: ACTIVE METHOD for awareness-raising (group work) AFFIRMATIVE METHOD for theoretical part, expert presentation ACTIVE METHOD for application (debate)</td>
</tr>
<tr>
<td>Resources</td>
<td>Expert Guide (The role of social protection in the fight against exclusion and poverty) PPT presentation/flipchart Participants' experience Activity sheet</td>
</tr>
<tr>
<td>Duration</td>
<td>1h30 – 2 hours</td>
</tr>
</tbody>
</table>

## Training sequence 4 - The main problems and questions concerning social protection raised at national and European level

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
<th>To synthesise the main problems and questions concerning social protection raised at national and European level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary objectives</td>
<td>To raise participants' awareness of the main problems and questions concerning social protection raised at national and European level. To identify the main problems and questions concerning social protection raised at national and European level. To synthesise the main problems and questions concerning social protection raised at national and European level in the trade union context</td>
</tr>
<tr>
<td>Pedagogical approaches</td>
<td>RAISING AWARENESS by Q&amp;A THEORETICAL PART, presentation by expert APPLICATION in debate</td>
</tr>
<tr>
<td>Methods and techniques</td>
<td>We propose: INTERACTIVE METHOD for raising awareness (Q&amp;A) AFFIRMATIVE METHOD for theoretical part, expert presentation ACTIVE METHOD for application (debate)</td>
</tr>
<tr>
<td>Resources</td>
<td>Expert Guide (The problems or questions posed) PPT presentation/flipchart Participants' experience Activity sheet</td>
</tr>
<tr>
<td>Duration</td>
<td>1h - 1.30 hours</td>
</tr>
</tbody>
</table>
### Training sequence 5 - The trade union strategies which have been developed to improve the quality of social protection

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
<th>– To analyse the trade union strategies which have been developed to improve the quality of social protection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary objectives</td>
<td>– To raise participants’ awareness of the trade union strategies which have been developed to improve the quality of social protection</td>
</tr>
<tr>
<td></td>
<td>– To identify good practices in the trade union strategies which have been developed to improve the quality of social protection</td>
</tr>
<tr>
<td></td>
<td>– To analyse the trade union strategies which have been developed to improve the quality of social protection</td>
</tr>
<tr>
<td>Pedagogical approaches</td>
<td>RAISING AWARENESS by Q&amp;A</td>
</tr>
<tr>
<td></td>
<td>THEORETICAL PART, presentation by expert</td>
</tr>
<tr>
<td></td>
<td>APPLICATION in debate</td>
</tr>
<tr>
<td>Methods and techniques</td>
<td>We propose:</td>
</tr>
<tr>
<td></td>
<td>INTERACTIVE METHOD for raising awareness (Q&amp;A)</td>
</tr>
<tr>
<td></td>
<td>AFFIRMATIVE METHOD for theoretical part, expert presentation</td>
</tr>
<tr>
<td></td>
<td>ACTIVE METHOD for application (debate)</td>
</tr>
<tr>
<td>Resources</td>
<td>Expert</td>
</tr>
<tr>
<td></td>
<td>Guide (Trade union strategies)</td>
</tr>
<tr>
<td></td>
<td>PPT presentation/flipchart:</td>
</tr>
<tr>
<td></td>
<td>Participants’ experience</td>
</tr>
<tr>
<td>Duration</td>
<td>1h30 -2 hours</td>
</tr>
</tbody>
</table>

### Training sequence 6 - The ETUC position on social protection in the fight against poverty and social exclusion

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
<th>– To define the ETUC position on social protection in the fight against poverty and social exclusion.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary objectives</td>
<td>– To raise participants’ awareness of the impact of the ETUC position on social protection in the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td></td>
<td>– To define the ETUC position on social protection in the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td></td>
<td>– To analyse the ETUC position on social protection in the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td>Pedagogical approaches</td>
<td>RAISING AWARENESS by Q&amp;A</td>
</tr>
<tr>
<td></td>
<td>THEORETICAL PART, presentation by expert</td>
</tr>
<tr>
<td></td>
<td>APPLICATION in debate</td>
</tr>
<tr>
<td>Methods and techniques</td>
<td>We propose:</td>
</tr>
<tr>
<td></td>
<td>INTERACTIVE METHOD for raising awareness (Q&amp;A)</td>
</tr>
<tr>
<td></td>
<td>AFFIRMATIVE METHOD for theoretical part, expert presentation</td>
</tr>
<tr>
<td></td>
<td>ACTIVE METHOD for application (debate)</td>
</tr>
<tr>
<td>Resources</td>
<td>Expert</td>
</tr>
<tr>
<td></td>
<td>Guide</td>
</tr>
<tr>
<td></td>
<td>PPT presentation/flipchart:</td>
</tr>
<tr>
<td></td>
<td>Participants’ experience</td>
</tr>
<tr>
<td>Duration</td>
<td>1h - 1.30 hours</td>
</tr>
</tbody>
</table>
### Training sequence 7
**National trade union action plan on the minimum wage in the fight against poverty and social exclusion.**

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
<th>To contribute to strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary objectives</td>
<td>To raise participants’ awareness of the importance of strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td></td>
<td>To identify the basic elements of a national trade union action plan on the minimum wage in the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td></td>
<td>To synthesise a national trade union action plan on the minimum wage in the fight against poverty and social exclusion.</td>
</tr>
</tbody>
</table>

**Pedagogical approaches**

- RAISING PARTICIPANTS’ AWARENESS in group work
- THEORETICAL PART, presentation by expert
- APPLICATION in debate

**Methods and techniques**

- We propose:  
  - ACTIVE METHOD for awareness-raising (group work)  
  - AFFIRMATIVE METHOD for theoretical part, expert presentation  
  - ACTIVE METHOD for application (debate)

**Resources**

- Expert Guide (Fighting poverty: parallel action upstream on the quality of work and wages)  
- PPT presentation/flipchart  
- Participants’ experience  
- Activity sheet

**Duration**

1h30 - 2 hours
Chapter 3
training activities

The quality of social protection

<table>
<thead>
<tr>
<th>Chapter 2: The quality of social protection</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Training objectives</strong></td>
</tr>
<tr>
<td>– To compare national and European situations regarding social protection</td>
</tr>
<tr>
<td>– To familiarise participants with the concepts of poverty, social exclusion and social protection</td>
</tr>
<tr>
<td>– To raise participants' awareness of the role and effectiveness of social protection in the fight against poverty</td>
</tr>
<tr>
<td>– To synthesise the main problems and questions concerning social protection raised at national and European level</td>
</tr>
<tr>
<td>– To analyse the trade union strategies which have been developed to improve the quality of social protection</td>
</tr>
<tr>
<td>– To familiarise participants with the ETUC position on social protection in the fight against poverty and social exclusion</td>
</tr>
<tr>
<td>– To contribute to strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion</td>
</tr>
<tr>
<td><strong>Target Group</strong></td>
</tr>
<tr>
<td>Trade unionists dealing with social protection, education officers and trainers</td>
</tr>
<tr>
<td><strong>Assessment</strong></td>
</tr>
<tr>
<td>Assessment of participants:</td>
</tr>
<tr>
<td>Initial assessment (participants' experience of the subject)</td>
</tr>
<tr>
<td>Formative assessment (observation, written assessment, reciprocal assessment, self-assessment)</td>
</tr>
<tr>
<td>Assessment of seminar:</td>
</tr>
<tr>
<td>Assessment questionnaire for participants</td>
</tr>
<tr>
<td>Assessment by the course team</td>
</tr>
</tbody>
</table>

**Preliminary work by participants**
This activity is based on a questionnaire sent to participants before the course, and preliminary work enabling them to prepare for group work and acquire familiarity with the subject. The preliminary work is based on knowledge of their own national systems and consists of a presentation of the national social protection system. The questionnaire and the work sheet for the preliminary work will be sent out to participants along with confirmation of their attendance on the course.
Trade unions and the fight against poverty and social exclusion

Objectives:
– To familiarise participants with the subject of the course
– To synthesise the characteristics of national social protection systems
– To contribute to the work which will be carried out during the course

Task:
Before arriving at the seminar, you will be asked to prepare a short presentation in order to inform the other participants about your national social protection system in a consistent manner.

Report:
The material will be used during the seminar for group work.

Timing:
To be prepared before the seminar.
You will have 7-10 minutes to present your report on the situation in your country.

Resources:
– Activity sheet
– Personal experience

Three-day course programme (18 hours)

<table>
<thead>
<tr>
<th>Time</th>
<th>First day</th>
<th>Second day</th>
<th>Third day</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:00</td>
<td>Opening</td>
<td>3. The role and effectiveness of social protection in the fight against poverty.</td>
<td>6. The ETUC position on social protection in the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td></td>
<td>Course objectives</td>
<td>– Group work</td>
<td>– Presentation by expert</td>
</tr>
<tr>
<td></td>
<td>Presentations:</td>
<td>– Programme and working method</td>
<td>– Debate</td>
</tr>
<tr>
<td></td>
<td>– Participants</td>
<td>– Group work</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Programme and working method</td>
<td>– Discussion</td>
<td></td>
</tr>
<tr>
<td>12:30</td>
<td>Coffee break</td>
<td>Coffee break</td>
<td>Coffee break</td>
</tr>
<tr>
<td></td>
<td>1. Introduction</td>
<td>– Group reports</td>
<td>7. National trade union action plan on social protection in the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td></td>
<td>The concepts of poverty, social exclusion and social protection</td>
<td>– Discussion</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Group work</td>
<td>– Group reports</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Group reports</td>
<td>– Discussion</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Discussion</td>
<td>– Group reports</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Group reports</td>
<td>– Discussion</td>
<td></td>
</tr>
<tr>
<td>12:30</td>
<td>Lunch</td>
<td>Lunch</td>
<td>Lunch</td>
</tr>
<tr>
<td>14:00</td>
<td>Lunch</td>
<td>Lunch</td>
<td>Lunch</td>
</tr>
<tr>
<td>14:00</td>
<td>2. National and European situations regarding social protection</td>
<td>4. The main problems and questions concerning social protection raised at national and European level</td>
<td>– Group reports</td>
</tr>
<tr>
<td></td>
<td>– Group work</td>
<td>– Presentation by expert</td>
<td>– Discussion</td>
</tr>
<tr>
<td></td>
<td></td>
<td>– Debate</td>
<td></td>
</tr>
<tr>
<td>17:30</td>
<td>End of the day</td>
<td>End of the day</td>
<td>Departure of participants</td>
</tr>
<tr>
<td>19:00</td>
<td>Dinner</td>
<td>Dinner</td>
<td>Dinner</td>
</tr>
</tbody>
</table>
## Trade unions and the fight against poverty and social exclusion

### Training sequence 1 - Introduction

**Training objective of the sequence**  
To familiarise participants with the main concepts involved in the subject of poverty and social exclusion

**Secondary objectives**  
- To raise participants’ awareness of the impact of poverty and social exclusion in the lives of workers.  
- To identify the basic elements of poverty and social exclusion in the trade union context  
- To analyse the question of poverty and social exclusion in the European and international context

**Pedagogical approaches**  
RAISING AWARENESS by brainstorming  
THEORETICAL PART, presentation by expert  
APPLICATION in group work

**Methods and techniques**  
We propose  
INTERACTIVE METHOD for raising awareness (brainstorming)  
AFFIRMATIVE METHOD for theoretical part, expert presentation  
ACTIVE METHOD for application (group work)

**Resources**  
**Expert**  
(An introduction defining the concept of poverty in ILO, international, European and national contexts, and the ETUC position; social categories at risk of poverty; methods of identifying poverty levels; fundamental aspects causing poverty; aspects influencing the level of poverty represented in the following chapters)  
(Definition: What do we mean by a minimum wage in the European Union?)  
PPT presentation/flipchart  
Participants’ experience  
Activity sheet

**Duration**  
2-3 hours

### Training sequence 2 - National and European situations regarding the minimum wage

**Training objective of the sequence**  
To compare national and European situations regarding the minimum wage

**Secondary objectives**  
- To raise participants’ awareness of the different national and European situations regarding the minimum wage  
- To identify national and European situations regarding the minimum wage  
- To compare national situations regarding the minimum wage in the European context

**Pedagogical approaches**  
RAISING PARTICIPANTS’ AWARENESS in group work  
THEORETICAL PART, presentation by expert  
APPLICATION in debate

**Methods and techniques**  
We propose  
ACTIVE METHOD for awareness-raising (group work)  
AFFIRMATIVE METHOD for theoretical part, expert presentation  
ACTIVE METHOD for application (debate)

**Resources**  
**Expert**  
Guide (The minimum wage in Europe, What is the reality of the ‘minimum wage’ in Europe?)  
PPT presentation/flipchart  
Participants’ experience  
Activity sheet

**Duration**  
2-3 hours
### Training sequence 7 - National trade union action plan on social protection in the fight against poverty and social exclusion

#### Training objective of the sequence
- To contribute to strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion

#### Secondary objectives
- To raise participants’ awareness of the importance of strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion
- To identify the basic elements of a national trade union action plan on social protection in the fight against poverty and social exclusion
- To synthesise a national trade union action plan on social protection in the fight against poverty and social exclusion

#### Pedagogical approaches
- RAISING PARTICIPANTS’ AWARENESS in group work
- THEORETICAL PART, presentation by expert
- APPLICATION in debate

#### Methods and techniques
- We propose:
  - ACTIVE METHOD for awareness-raising (group work)
  - AFFIRMATIVE METHOD for theoretical part, expert presentation
  - ACTIVE METHOD for application (debate)

#### Resources
- Expert Guide (Establishing quantitative and qualitative objectives)
- PPT presentation/flipchart:
  - Participants’ experience
  - Activity sheet

#### Duration
- 1h30 – 2 hours
Chapter 4

Training activities

Quality of work and flexicurity

<table>
<thead>
<tr>
<th>Chapter 4: Quality of work and flexicurity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Training objectives</strong></td>
</tr>
<tr>
<td>– To compare national and European situations regarding the quality of work and flexicurity</td>
</tr>
<tr>
<td>– To familiarise participants with the concepts of poverty, social exclusion, the quality of work and flexicurity</td>
</tr>
<tr>
<td>– To raise participants' awareness of the role and effectiveness of the quality of work and flexicurity in the fight against poverty and social exclusion</td>
</tr>
<tr>
<td>– To synthesise the main problems and questions concerning the quality of work and flexicurity raised at national and European level</td>
</tr>
<tr>
<td>– To analyse the trade union strategies which have been developed to improve the quality of work and the question of flexicurity</td>
</tr>
<tr>
<td>– To familiarise participants with the ETUC position on the quality of work and flexicurity in the fight against poverty and social exclusion</td>
</tr>
<tr>
<td>– To contribute to strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Target Group</strong></th>
<th>Trade unionists dealing with working conditions, education officers and trainers</th>
</tr>
</thead>
</table>

**Assessment**
- Assessment of participants:
  - Initial assessment (participants' experience of the subject)
  - Formative assessment (observation, written assessment, reciprocal assessment, self-assessment)
  - Summative assessment (individual/national action plan)
- Assessment of seminar:
  - Assessment questionnaire for participants
  - Assessment by the course team

**Preliminary work by participants**
This activity is based on a questionnaire sent to participants before the course, and preliminary work enabling them to prepare for group work and acquire familiarity with the subject. The preliminary work is based on knowledge of their own national systems and consists of a presentation on the quality of work and the question of flexicurity. The questionnaire and the work sheet for the preliminary work will be sent out to participants along with confirmation of their attendance on the course.
Trade unions and the fight against poverty and social exclusion

**Seminar subject**

**Date:**

**Objectives:**
- To familiarise participants with the subject of the course
- To analyse the national situation regarding the quality of work and the question of flexicurity
- To contribute to the work which will be carried out during the course

**Task:**
Before arriving at the seminar, you will be asked to prepare a short presentation in order to inform the other participants about your national situation regarding the quality of work and the question of flexicurity in a consistent manner.

**Report:**
The material will be used during the seminar for group work.

**Timing:**
To be prepared before the seminar.
You will have 7-10 minutes to present your report on the situation in your country.

**Resources:**
- Activity sheet
- Personal experience

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### Three-day course programme (18 hours)

<table>
<thead>
<tr>
<th>Time</th>
<th>First day</th>
<th>Second day</th>
<th>Third day</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:00</td>
<td><strong>Opening</strong>&lt;br&gt;Course objectives&lt;br&gt;Presentations:&lt;br&gt;– Participants&lt;br&gt;– Programme and working method</td>
<td>3. The role and effectiveness of the quality of work and the question of flexicurity in the fight against poverty and social exclusion&lt;br&gt;– Group work</td>
<td>6. The ETUC position on the quality of work and flexicurity in the fight against poverty and social exclusion.&lt;br&gt;– Presentation by expert&lt;br&gt;– Debate</td>
</tr>
<tr>
<td>30*</td>
<td>Coffee break</td>
<td>Coffee break</td>
<td>Coffee break</td>
</tr>
<tr>
<td>12.30</td>
<td>1. Introduction&lt;br&gt;The concepts of poverty, social exclusion, the quality of work and flexicurity&lt;br&gt;– Group work&lt;br&gt;– Group reports&lt;br&gt;– Discussion</td>
<td>– Group reports&lt;br&gt;– Discussion</td>
<td>7. National trade union action plan on the quality of work and the question of flexicurity in the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td>12.30</td>
<td>Lunch</td>
<td>Lunch</td>
<td>Lunch</td>
</tr>
<tr>
<td>14.00</td>
<td>2. National and European situations regarding the quality of work and flexicurity&lt;br&gt;– Group work</td>
<td>4. The main problems and questions concerning the quality of work and flexicurity raised at national and European level&lt;br&gt;– Presentation by expert&lt;br&gt;– Debate</td>
<td>– Group reports&lt;br&gt;– Discussion</td>
</tr>
<tr>
<td>30*</td>
<td>Coffee break</td>
<td>Coffee break</td>
<td>Coffee break</td>
</tr>
<tr>
<td><strong>arrival</strong></td>
<td>– Group reports&lt;br&gt;– Discussion</td>
<td>5. Trade union strategies which have been developed to improve the quality of work and the question of flexicurity&lt;br&gt;– Presentation of good practices (perspective of at least one national trade union organisation)&lt;br&gt;– Debate</td>
<td>Conclusions&lt;br&gt;Course assessment</td>
</tr>
<tr>
<td>17.30</td>
<td>End of the day</td>
<td>End of the day</td>
<td>Departure of participants</td>
</tr>
<tr>
<td>19.00</td>
<td>Dinner</td>
<td>Dinner</td>
<td>Dinner</td>
</tr>
</tbody>
</table>

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### Training sequence 1 - Introduction

**Training objective of the sequence**

- To familiarise participants with the main concepts involved in the subject of poverty and social exclusion

**Secondary objectives**

- To raise participants' awareness of the impact of poverty and social exclusion in the lives of workers.
- To identify the basic elements of poverty and social exclusion in the trade union context
- To analyse the question of poverty and social exclusion in the European and international context

**Pedagogical approaches**

- RAISING AWARENESS by brainstorming
- THEORETICAL PART, presentation by expert
- APPLICATION in group work

**Methods and techniques**

- We propose:
  - INTERACTIVE METHOD for raising awareness (brainstorming)
  - AFFIRMATIVE METHOD for theoretical part, expert presentation
  - ACTIVE METHOD for application (group work)

**Resources**

- Expert
- Guide (What about the Danish example?)
- PPT presentation/flipchart:
- Participants' experience
- Activity sheet

**Duration**

2-3 hours

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### Training sequence 2 - National and European situations regarding the quality of work and flexicurity

**Training objective of the sequence**

- To compare national and European situations regarding the quality of work and flexicurity

**Secondary objectives**

- To raise participants' awareness of the different national and European situations regarding the quality of work and flexicurity
- To identify national and European situations regarding the quality of work and flexicurity
- To compare national situations regarding the quality of work and flexicurity in the European context

**Pedagogical approaches**

- RAISING PARTICIPANTS’ AWARENESS in group work
- THEORETICAL PART, presentation by expert
- APPLICATION in debate

**Methods and techniques**

- We propose:
  - ACTIVE METHOD for awareness-raising (group work)
  - AFFIRMATIVE METHOD for theoretical part, expert presentation
  - ACTIVE METHOD for application (debate)

**Resources**

- Expert
- Guide (What about the Danish example?)
- PPT presentation/flipchart:
- Participants' experience
- Activity sheet

**Duration**

2-3 hours
## Training sequence 3
The role and effectiveness of the quality of work and flexicurity in the fight against poverty and social exclusion

### Training objective of the sequence
- To raise participants’ awareness of the role and effectiveness of the quality of work and flexicurity in the fight against poverty and social exclusion

### Secondary objectives
- To raise participants’ awareness of the role and effectiveness of the quality of work and flexicurity in the fight against poverty and social exclusion
- To identify the basic elements of the role and effectiveness of the quality of work and flexicurity in the fight against poverty and social exclusion
- To analyse the role and effectiveness of the quality of work and flexicurity in the fight against poverty and social exclusion in the trade union context

### Pedagogical approaches
- RAISING PARTICIPANTS’ AWARENESS in group work
- THEORETICAL PART, presentation by expert
- APPLICATION in debate

### Methods and techniques
We propose:
- ACTIVE METHOD for awareness-raising (group work)
- AFFIRMATIVE METHOD for theoretical part, expert presentation
- ACTIVE METHOD for application (debate)

### Resources
- Expert Guide (The European situation: the role of each aspect of the quality of work in the fight against poverty and social exclusion and the questions/problems raised)
- PPT presentation/flipchart: Participants’ experience
- Activity sheet

### Duration
1h30 - 2 hours

## Training sequence 4
The main problems and questions concerning the quality of work and flexicurity raised at national and European level

### Training objective of the sequence
- To synthesise the main problems and questions concerning the quality of work and flexicurity raised at national and European level

### Secondary objectives
- To raise participants’ awareness of the impact of the main problems and questions concerning the quality of work and flexicurity raised at national and European level
- To identify the main problems and questions concerning the quality of work and flexicurity raised at national and European level
- To synthesise the main problems and questions concerning the quality of work and flexicurity raised at national and European level in the trade union context

### Pedagogical approaches
- RAISING AWARENESS by Q&A
- THEORETICAL PART, presentation by expert
- APPLICATION in debate

### Methods and techniques
We propose:
- INTERACTIVE METHOD for raising awareness (Q&A)
- AFFIRMATIVE METHOD for theoretical part, expert presentation
- ACTIVE METHOD for application (debate)

### Resources
- Expert Guide (The European situation: the role of each aspect of the quality of work in the fight against poverty and social exclusion and the questions/problems raised)
- PPT presentation/flipchart: Participants’ experience
- Activity sheet

### Duration
1h - 1.30 hours
## Training sequence 5
### Trade union strategies which have been developed to improve the quality of work and the question of flexicurity

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
<th>— To analyse the trade union strategies which have been developed to improve the quality of work and the question of flexicurity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary objectives</td>
<td>— To raise participants’ awareness of the importance of the trade union strategies which have been developed to improve the quality of work and the question of flexicurity</td>
</tr>
<tr>
<td></td>
<td>— To identify good practices in the trade union strategies which have been developed to improve the quality of work and the question of flexicurity</td>
</tr>
<tr>
<td></td>
<td>— To analyse the trade union strategies which have been developed to improve the quality of work and the question of flexicurity</td>
</tr>
<tr>
<td>Pedagogical approaches</td>
<td>RAISING AWARENESS by Q&amp;A</td>
</tr>
<tr>
<td>Methods and techniques</td>
<td>THEORETICAL PART, presentation by expert</td>
</tr>
<tr>
<td></td>
<td>APPLICATION in debate</td>
</tr>
<tr>
<td>Resources</td>
<td>Expert</td>
</tr>
<tr>
<td></td>
<td>Guide (Trade union strategies)</td>
</tr>
<tr>
<td></td>
<td>PPT presentation/flipchart:</td>
</tr>
<tr>
<td></td>
<td>Participants’ experience</td>
</tr>
<tr>
<td>Duration</td>
<td>1h30 -2 hours</td>
</tr>
</tbody>
</table>

## Training sequence 6
### The ETUC position on the quality of work and flexicurity in the fight against poverty and social exclusion

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
<th>— To define the ETUC position on the quality of work and flexicurity in the fight against poverty and social exclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary objectives</td>
<td>— To raise participants' awareness of the impact of the ETUC position on the quality of work and flexicurity in the fight against poverty and social exclusion</td>
</tr>
<tr>
<td></td>
<td>— To define the ETUC position on the quality of work and flexicurity in the fight against poverty and social exclusion</td>
</tr>
<tr>
<td></td>
<td>— To analyse the ETUC position on the quality of work and flexicurity in the fight against poverty and social exclusion</td>
</tr>
<tr>
<td>Pedagogical approaches</td>
<td>RAISING AWARENESS by Q&amp;A</td>
</tr>
<tr>
<td>Methods and techniques</td>
<td>THEORETICAL PART, presentation by expert</td>
</tr>
<tr>
<td></td>
<td>APPLICATION in debate</td>
</tr>
<tr>
<td>Resources</td>
<td>Expert</td>
</tr>
<tr>
<td></td>
<td>Guide</td>
</tr>
<tr>
<td></td>
<td>PPT presentation/flipchart:</td>
</tr>
<tr>
<td></td>
<td>Participants’ experience</td>
</tr>
<tr>
<td>Duration</td>
<td>1h - 1.30 hours</td>
</tr>
</tbody>
</table>
### Training sequence 7
**National trade union action plan on the quality of work and the question of flexicurity in the fight against poverty and social exclusion**

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
</tr>
</thead>
<tbody>
<tr>
<td>— To contribute to strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Secondary objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>— To raise participants' awareness of the importance of strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion</td>
</tr>
<tr>
<td>— To identify the basic elements of a national trade union action plan on the quality of work and the question of flexicurity in the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td>— To synthesise a national trade union action plan on the quality of work and the question of flexicurity in the fight against poverty and social exclusion.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pedagogical approaches</th>
</tr>
</thead>
<tbody>
<tr>
<td>RAISING PARTICIPANTS' AWARENESS in group work</td>
</tr>
<tr>
<td>THEORETICAL PART, presentation by expert</td>
</tr>
<tr>
<td>APPLICATION in debate</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Methods and techniques</th>
</tr>
</thead>
<tbody>
<tr>
<td>We propose:</td>
</tr>
<tr>
<td>ACTIVE METHOD for awareness-raising (group work)</td>
</tr>
<tr>
<td>AFFIRMATIVE METHOD for theoretical part, expert presentation</td>
</tr>
<tr>
<td>ACTIVE METHOD for application (debate)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expert</td>
</tr>
<tr>
<td>Guide (Improving social dialogue and collective bargaining)</td>
</tr>
<tr>
<td>PPT presentation/flipchart:</td>
</tr>
<tr>
<td>Participants' experience</td>
</tr>
<tr>
<td>Activity sheet</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>1h30 – 2 hours</td>
</tr>
</tbody>
</table>
Chapter 5

training activities

Services of general interest

<table>
<thead>
<tr>
<th>Chapter 5: Services of general interest</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Training objectives</strong></td>
</tr>
<tr>
<td>– To compare national and European perspectives on services of general interest</td>
</tr>
<tr>
<td>– To familiarise participants with the concepts of poverty, social exclusion and services of general interest</td>
</tr>
<tr>
<td>– To raise participants’ awareness of the role and effectiveness of services of general interest in the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td>– To synthesise the main problems and questions concerning services of general interest raised at national and European level</td>
</tr>
<tr>
<td>– To analyse the trade union strategies which have been developed to improve the quality of services of general interest</td>
</tr>
<tr>
<td>– To familiarise participants with the ETUC position on services of general interest in the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td>– To contribute to strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion.</td>
</tr>
<tr>
<td><strong>Target Group</strong></td>
</tr>
<tr>
<td>Trade unionists dealing with services of general interest, education officers and trainers</td>
</tr>
<tr>
<td><strong>Assessment</strong></td>
</tr>
<tr>
<td>Assessment of participants:</td>
</tr>
<tr>
<td>Initial assessment (participants’ experience of the subject)</td>
</tr>
<tr>
<td>Formative assessment (observation, written assessment, reciprocal assessment, self-assessment)</td>
</tr>
<tr>
<td>Summative assessment (individual/national action plan)</td>
</tr>
<tr>
<td>Assessment of seminar:</td>
</tr>
<tr>
<td>Assessment questionnaire for participants</td>
</tr>
<tr>
<td>Assessment by the course team</td>
</tr>
</tbody>
</table>

Preliminary work by participants
This activity is based on a questionnaire sent to participants before the course, and preliminary work enabling them to prepare for group work and acquire familiarity with the subject. The preliminary work is based on knowledge of their own national systems and consists of a presentation of the national system for services of general interest. The questionnaire and the work sheet for the preliminary work will be sent out to participants along with confirmation of their attendance on the course.
Seminar subject: Trade unions and the fight against poverty and social exclusion

Objectives:
– To familiarise participants with the subject of the course
– To synthesise the characteristics of national systems for services of general interest
– To contribute to the work which will be carried out during the course

Task:
Before arriving at the seminar, you will be asked to prepare a short presentation in order to inform the other participants about your national system for services of general interest in a consistent manner.

Report:
The material will be used during the seminar for group work.

Timing:
To be prepared before the seminar.
You will have 7-10 minutes to present your report on the situation in your country.

Resources:
– Activity sheet
– Personal experience

Three-day course programme (18 hours)

<table>
<thead>
<tr>
<th>Time</th>
<th>First day</th>
<th>Second day</th>
<th>Third day</th>
</tr>
</thead>
</table>
| 09:00  | Opening                                       | 3. The role and effectiveness of services of general interest in the fight against poverty and social exclusion.  
Course objectives  
Presentations:  
– Participants  
– Programme and working method  
– Group work  |
|        |                                               | 6. The ETUC position on services of general interest in the fight against poverty and social exclusion.  
– Presentation by expert  
– Debate  |
| 30*    | Coffee break                                 | Coffee break                                  | Coffee break                                  |
| 12:30  | 1. Introduction  
The concepts of poverty, social exclusion and services of general interest  
– Group work  
– Group reports  
– Discussion  | 7. National trade union action plan for services of general interest in the fight against poverty and social exclusion.  
– Group reports  
– Discussion  |
| 12:30  | Lunch                                        | Lunch                                         | Lunch                                         |
| 14:00  | 2. National and European situations regarding services of general interest  
– Group work  | 4. The main problems and questions concerning services of general interest raised at national and European level  
– Presentation by expert  
– Debate  |
|        |                                               |                                               |                                               |
| 30*    | Coffee break                                 | Coffee break                                  | Coffee break                                  |
| arrival| 5. Trade union strategies which have been developed to improve the quality of services of general interest  
– Presentation of good practices (perspective of at least one national trade union organisation)  
– Debate  | Conclusions  
Course assessment  |
| 17:30  | End of the day                               | End of the day                                | Departure of participants                      |
| 19:00  | Dinner                                       | Dinner                                        | Dinner                                        |
Training sequence 1 - Introduction

Training objective of the sequence -- To familiarise participants with the main concepts involved in the subject of poverty and social exclusion

Secondary objectives -- To raise participants’ awareness of the impact of poverty and social exclusion in the lives of workers.
-- To identify the basic elements of poverty and social exclusion in the trade union context.
-- To analyse the question of poverty and social exclusion in the European and international context.

Pedagogical approaches RAISING AWARENESS by brainstorming
THEORETICAL PART, presentation by expert
APPLICATION in group work

Methods and techniques We propose:
INTERACTIVE METHOD for raising awareness (brainstorming)
AFFIRMATIVE METHOD for theoretical part, expert presentation
ACTIVE METHOD for application (group work)

Resources Expert
(An introduction defining the concept of poverty in ILO, international, European and national contexts, and the ETUC position; social categories at risk of poverty; methods of identifying poverty levels; fundamental aspects causing poverty; aspects influencing the level of poverty presented in the following chapters)
(Definition of concept: what do we mean by services of general interest?)
PPT presentation/flipchart:
Participants’ experience
Activity sheet

Duration 2-3 hours

Training sequence 2 - National and European situations regarding services of general interest

Training objective of the sequence -- To compare national and European situations regarding services of general interest

Secondary objectives -- To raise participants’ awareness of the different national and European situations regarding services of general interest.
-- To identify national and European situations regarding services of general interest.
-- To compare national situations regarding services of general interest in the European context.

Pedagogical approaches RAISING PARTICIPANTS’ AWARENESS in group work
THEORETICAL PART, presentation by expert
APPLICATION in debate

Methods and techniques We propose:
ACTIVE METHOD for awareness-raising (group work)
AFFIRMATIVE METHOD for theoretical part, expert presentation
ACTIVE METHOD for application (debate)

Resources Expert
Guide (What is the actual situation of services of general interest in Europe and in the different countries?)
PPT presentation/flipchart:
Participants’ experience
Activity sheet

Duration 2-3 hours
### Training sequence 3
**The role and effectiveness of services of general interest in the fight against poverty and social exclusion**

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
<th>– To raise participants’ awareness of the role and effectiveness of services of general interest in the fight against poverty and social exclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary objectives</td>
<td>– To raise participants’ awareness of the role and effectiveness of services of general interest in the fight against poverty and social exclusion</td>
</tr>
<tr>
<td></td>
<td>– To identify the basic elements in the role and effectiveness of services of general interest in the fight against poverty and social exclusion</td>
</tr>
<tr>
<td></td>
<td>– To analyse the role and effectiveness of services of general interest in the fight against poverty and social exclusion in the trade union context</td>
</tr>
<tr>
<td>Pedagogical approaches</td>
<td>RAISING PARTICIPANTS’ AWARENESS in group work</td>
</tr>
<tr>
<td></td>
<td>THEORETICAL PART, presentation by expert</td>
</tr>
<tr>
<td></td>
<td>APPLICATION in debate</td>
</tr>
<tr>
<td>Methods and techniques</td>
<td>We propose:</td>
</tr>
<tr>
<td></td>
<td>ACTIVE METHOD for awareness-raising (group work)</td>
</tr>
<tr>
<td></td>
<td>AFFIRMATIVE METHOD for theoretical part, expert presentation</td>
</tr>
<tr>
<td></td>
<td>ACTIVE METHOD for application (debate)</td>
</tr>
<tr>
<td>Resources</td>
<td>Expert Guide (What is the role of services of general interest in the fight against poverty and social exclusion, and under what circumstances do they fulfil it?)</td>
</tr>
<tr>
<td></td>
<td>PPT presentation/flipchart: Participants’ experience</td>
</tr>
<tr>
<td></td>
<td>Activity sheet</td>
</tr>
<tr>
<td>Duration</td>
<td>1h30 - 2 hours</td>
</tr>
</tbody>
</table>

### Training sequence 4
**The main problems and questions concerning services of general interest raised at national and European level**

<table>
<thead>
<tr>
<th>Training objective of the sequence</th>
<th>– To synthesise the main problems and questions concerning services of general interest raised at national and European level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary objectives</td>
<td>– To raise participants’ awareness of the main problems and questions concerning services of general interest raised at national and European level</td>
</tr>
<tr>
<td></td>
<td>– To identify the main problems and questions concerning services of general interest raised at national and European level</td>
</tr>
<tr>
<td></td>
<td>– To synthesise the main problems and questions concerning services of general interest raised at national and European level in the trade union context</td>
</tr>
<tr>
<td>Pedagogical approaches</td>
<td>RAISING AWARENESS by Q&amp;A</td>
</tr>
<tr>
<td></td>
<td>THEORETICAL PART, presentation by expert</td>
</tr>
<tr>
<td></td>
<td>APPLICATION in debate</td>
</tr>
<tr>
<td>Methods and techniques</td>
<td>We propose:</td>
</tr>
<tr>
<td></td>
<td>INTERACTIVE METHOD for raising awareness (Q&amp;A)</td>
</tr>
<tr>
<td></td>
<td>AFFIRMATIVE METHOD for theoretical part, expert presentation</td>
</tr>
<tr>
<td></td>
<td>ACTIVE METHOD for application (debate)</td>
</tr>
<tr>
<td>Resources</td>
<td>Expert Guide (The points which are/remain under debate and the new European legislative context)</td>
</tr>
<tr>
<td></td>
<td>PPT presentation/flipchart: Participants’ experience</td>
</tr>
<tr>
<td></td>
<td>Activity sheet</td>
</tr>
<tr>
<td>Duration</td>
<td>1h - 1.30 hours</td>
</tr>
</tbody>
</table>
Trade unions and the fight against poverty and social exclusion

**Training sequence 5**

**Trade union strategies which have been developed to improve the quality of services of general interest**

**Training objective of the sequence**

→ To analyse the trade union strategies which have been developed to improve the quality of services of general interest

**Secondary objectives**

→ To raise participants’ awareness of the importance of the trade union strategies which have been developed to improve the quality of services of general interest
→ To identify good practices in the trade union strategies which have been developed to improve the quality of services of general interest
→ To analyse the trade union strategies which have been developed to improve the quality of services of general interest

**Pedagogical approaches**

RAISING AWARENESS by Q&A
THEORETICAL PART, presentation by expert
APPLICATION in debate

**Methods and techniques**

We propose:
INTERACTIVE METHOD for raising awareness (Q&A)
AFFIRMATIVE METHOD for theoretical part, expert presentation
ACTIVE METHOD for application (debate)

**Resources**

Expert Guide *(The new context of the Treaty on the Functioning of the European Union (TFEU) provides some outline answers)*
PPT presentation/flipchart:
Participants’ experience

**Duration**

1h30 - 2 hours

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**Training sequence 6**

**The ETUC position on services of general interest in the fight against poverty and social exclusion**

**Training objective of the sequence**

→ To define the ETUC position on services of general interest in the fight against poverty and social exclusion.

**Secondary objectives**

→ To raise participants’ awareness of the impact of the ETUC position on services of general interest in the fight against poverty and social exclusion.
→ To define the ETUC position on services of general interest in the fight against poverty and social exclusion.
→ To analyse the ETUC position on services of general interest in the fight against poverty and social exclusion.

**Pedagogical approaches**

RAISING AWARENESS by Q&A
THEORETICAL PART, presentation by expert
APPLICATION in debate

**Methods and techniques**

We propose:
INTERACTIVE METHOD for raising awareness (Q&A)
AFFIRMATIVE METHOD for theoretical part, expert presentation
ACTIVE METHOD for application (debate)

**Resources**

Expert Guide
PPT presentation/flipchart:
Participants’ experience

**Duration**

1h - 1.30 hours

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123
Trade unions and the fight against poverty and social exclusion

<table>
<thead>
<tr>
<th>Training sequence 7</th>
<th>National trade union action plan for services of general interest in the fight against poverty and social exclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training objective</td>
<td>To contribute to strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion</td>
</tr>
<tr>
<td>of the sequence</td>
<td></td>
</tr>
<tr>
<td>Secondary objectives</td>
<td>To raise participants' awareness of the importance of strengthening social cohesion and trade union solidarity throughout Europe through the fight against poverty and social exclusion</td>
</tr>
<tr>
<td></td>
<td>To identify the basic elements of a national trade union action plan on services of general interest in the fight against poverty and social exclusion</td>
</tr>
<tr>
<td></td>
<td>To synthesise a national trade union action plan on services of general interest in the fight against poverty and social exclusion</td>
</tr>
<tr>
<td>Pedagogical</td>
<td>RAISING PARTICIPANTS' AWARENESS in group work</td>
</tr>
<tr>
<td>approaches</td>
<td>THEORETICAL PART, presentation by expert</td>
</tr>
<tr>
<td></td>
<td>APPLICATION in debate</td>
</tr>
<tr>
<td>Methods and</td>
<td>We propose:</td>
</tr>
<tr>
<td>techniques</td>
<td>ACTIVE METHOD for awareness-raising (group work)</td>
</tr>
<tr>
<td></td>
<td>AFFIRMATIVE METHOD for theoretical part, expert presentation</td>
</tr>
<tr>
<td></td>
<td>ACTIVE METHOD for application (debate)</td>
</tr>
<tr>
<td>Resources</td>
<td>Expert Guide (What trade union strategies should be developed for the ETUC and its organisations?)</td>
</tr>
<tr>
<td></td>
<td>PPT presentation/flipchart:</td>
</tr>
<tr>
<td></td>
<td>Participants' experience</td>
</tr>
<tr>
<td></td>
<td>Activity sheet</td>
</tr>
<tr>
<td>Duration</td>
<td>1h30 - 2 hours</td>
</tr>
</tbody>
</table>
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