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From the Margins to the Center? 25 Years of Social Indicators in EU Governance

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2010: the Lisbon Strategy

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Strategic Agenda 2000-2010: *"to become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion"*

Method: Open Method of Coordination (OMC): common objectives, monitoring, mutual learning, policy guidelines, reporting

Social Indicators (Laeken Indicators, EU Council December 2001) + Data (EU-SILC 2004)

AROP (+threshold)	Dispersion around the AROP rate
S80/S20	Anchored AROP
Persistent AROP	AROP rate before social transfers
Relative median AROP-gap	GINI
Regional cohesion	Persistence of low income
LT unemployment rate	Very LT unemployment rate
Persons living in jobless households	Persons with low educational attainment
Early school leavers	Infant mortality rate
Life-expectancy at birth	
Self-defined health status	

Extension of indicator set

https://employment-social-affairs.ec.europa.eu/policies-and-activities/social-protection-social-inclusion/social-protection-committee/indicators-sub-group/eu-social-indicators_en



Monitoring and Reporting

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Governance forum: Social Protection Committee (+Indicator Subgroup)

Reporting:

- National Action Plans
- Joint Report on Social Protection and Social Inclusion (annual)
- Reporting EPSCO Council

Evaluation of Lisbon Strategy

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Impact of Lisbon-strategy and OMC SPSI mixed

From one side:

- Social policy subject of coordination at EU level
- Social policy as productive factor
- Development of policy tools
- Visibility of social policy in EU and national policies

From the other side:

- OMC remains rather marginal process next to Financial-Macro economic policies
- Limited impact on objectives
- National actionplans often ‘micro measures for micro categories’

Monitoring: using indicators for exploring situation in Member States

Europe 2020 Strategy (2010-2020): Integration of social policy in overall EU governance

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European Council Juni 17th 2010:

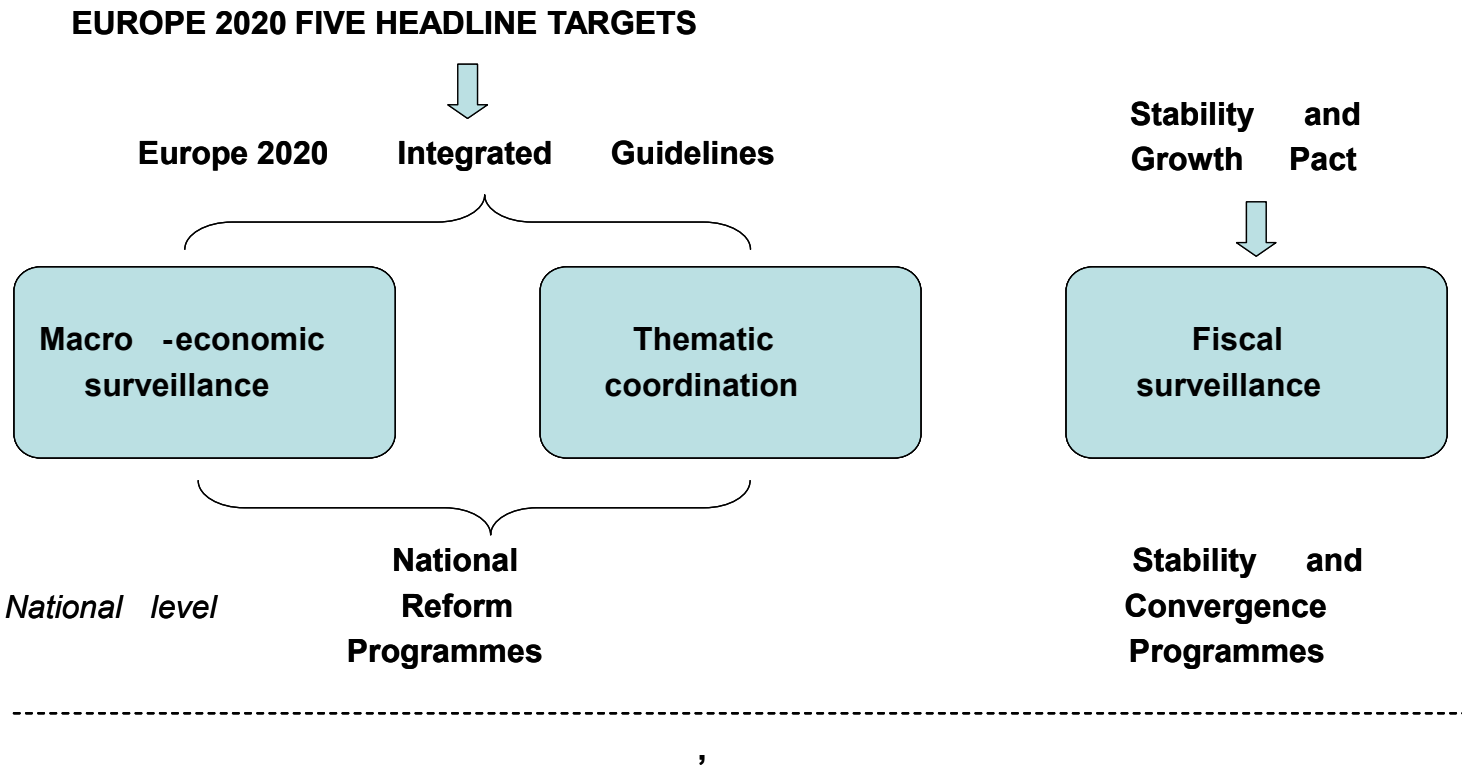
"we adopt "Europe 2020", our new strategy for jobs and smart, sustainable and ***inclusive growth****. It constitutes a coherent framework for the Union to mobilise all of its instruments and policies and for the Member States to take* ***enhanced coordinated action****."*

Context:

- *Financial crisis of 2008 and following economic crisis*
  - "we confirm our commitment to ensuring financial stability by addressing the gaps in regulation and supervision of financial markets"
  - "we fully agree on the urgent need to **reinforce the coordination of our economic policies.** We agree on first orientations as regards the Stability and Growth Pact and budgetary surveillance as well as broader macroeconomic surveillance"
- *From social policy strand: request for stronger social dimension*

The structure

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The (integrated) process: European Semester

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(from 2025: medium term fiscal structural plans)
November: **Autumn Package**:

- ➢Annual Growth Survey: Commissions view on next policy cycle
- ➢Eurozone Recommendation:
- ➢Joint Employment Report: Joint assessment of labour market and social situation (Commission+Member States)
- ➢Alert Mechanism Report: alert mechanism for macro-economic imbalances

February (June from early 20s): **Country Reports**
(Multilateral Implementation Reviews)
April**: National Reform Programs**/Annual Progress Report
June: **Country Specific Recommendations**

NEW!: headline targets

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employment	75% employed (20-64 y.)
R&D / innovation	3% of GDP (public+private)
Climate change / energy	Greenh. gas emissions -20% (30%) than 1990 20% of energy from renew 20% incr. in energy effic.
Education	school drop-out rates <10% at least 40% (30-34 y.olds) compl. third level educ.
Poverty / social exclusion	at least 20 million fewer people at risk of poverty and social exclusion

Context and scope

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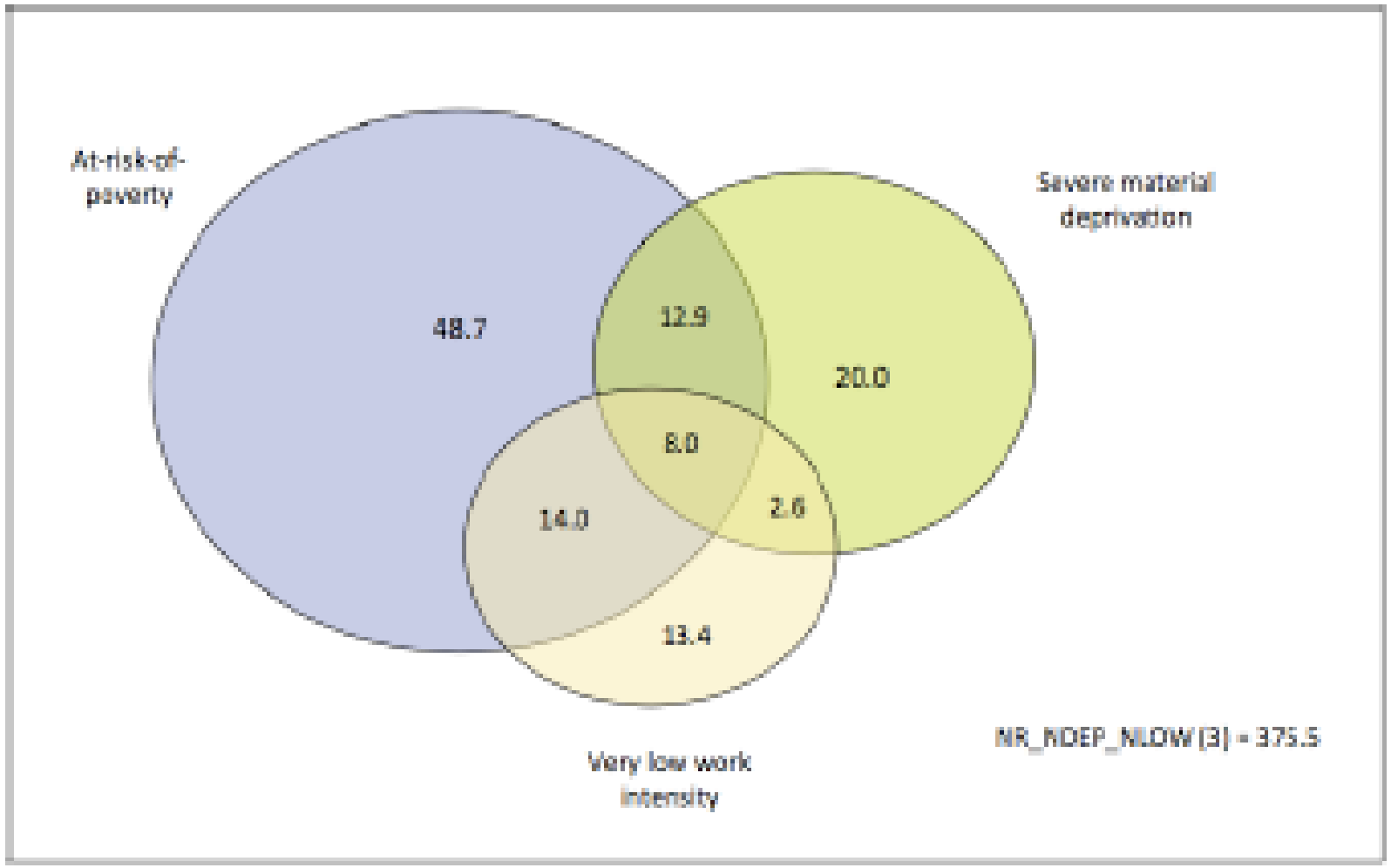
Based on 3 indicators:

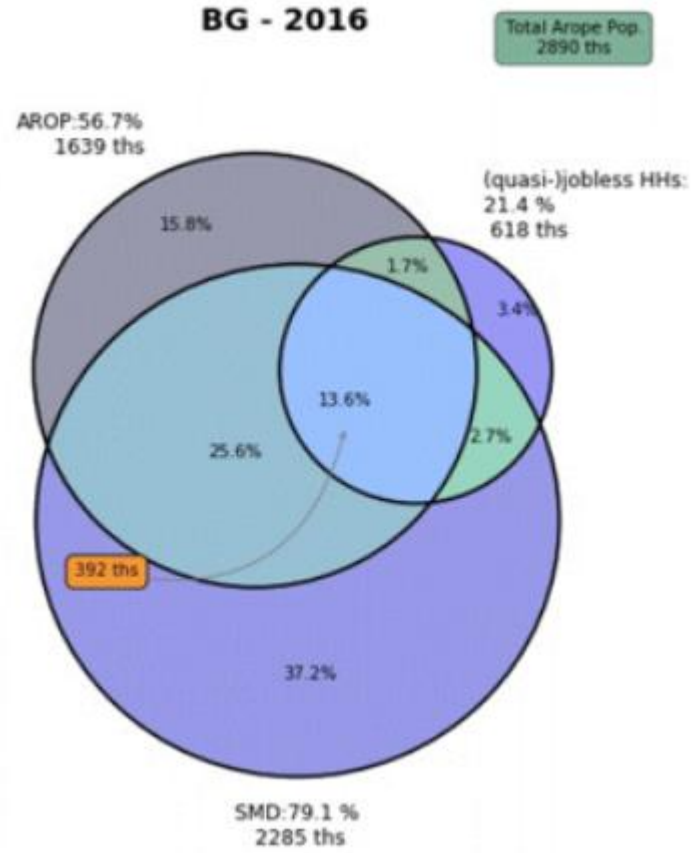
- *number of persons at-risk-of-poverty: number of persons in household with income below 60% of national median equivalized household income*
- *Number of persons in (quasi-)jobless households: i.e. a household where adult members work less than 20% of the potential number of months they could have worked over the year.*
- *Number of persons in household in situation of Severe material deprivation: not have/being able to do at least 4 out of 9 items (pay for rent/mortgage/utility, keep home adequately warm, pay for unexpected expenses, eat meat/proteins regularly, go on holiday, a TV set, a washing machine, a car, a telephone)*

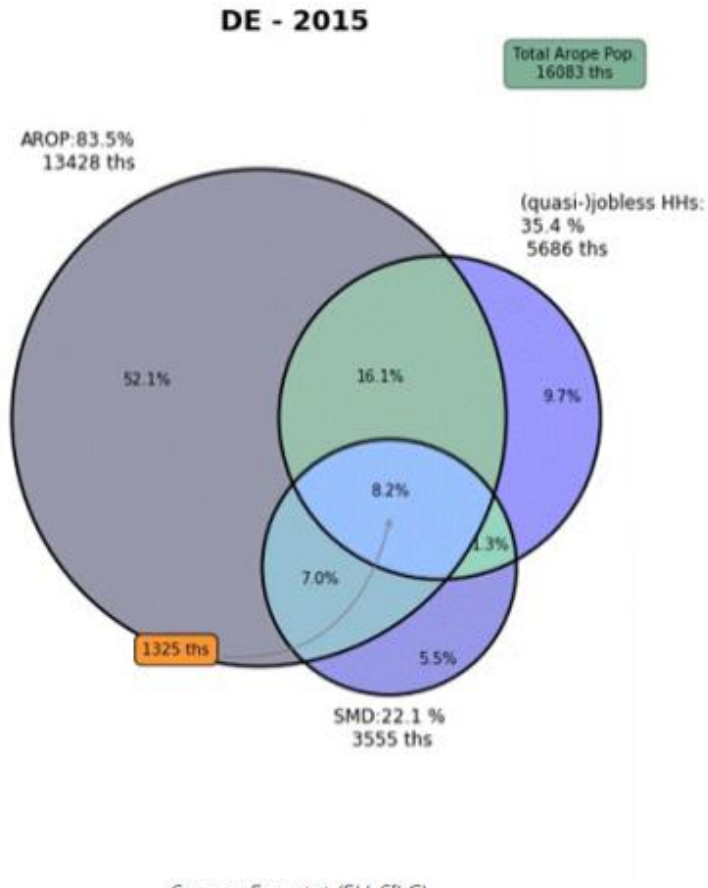
A persons is at-risk-of-poverty or socially excluded if he/she 'scores' on at least one of the indicators.

Member States to set national targets, based on own choice of indicators but to show link with EU-target

Figure 2. People at risk of poverty or social exclusion, EU-27, 2011 (million persons).







Source: Eurostat (EU-SILC)

Monitoring under Europe 2020: introduction of high level monitoring tools

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Joint Assessment Framework -> monitoring Employment guidelines
Social Protection Performance Monitor -> Annual Report SPC

Evaluation of Lisbon Strategy

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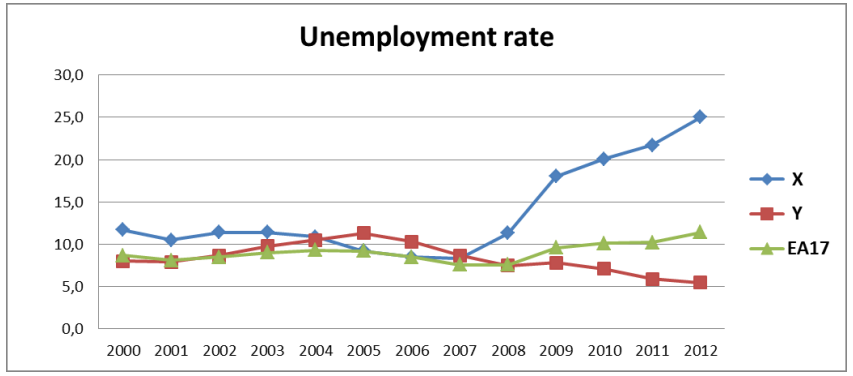
2010-2014 (Commission Barosso II): dominance of "**austerity policy**"

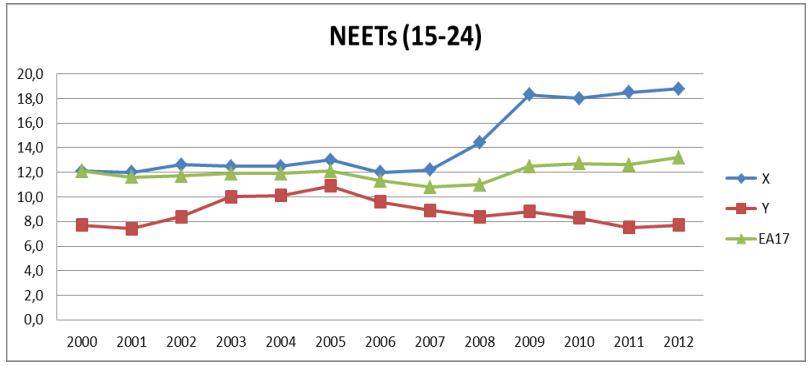
- ➢ Initially recognition of role of social protection as 'automatic stabilizer'
- ➢ But soon dominance of (strict) fiscal policies
- ➢ Country Specific Reccomendations-(CSRs) are first and foremost of fiscal and economic nature (also on domains of pensions- and health expenditure).

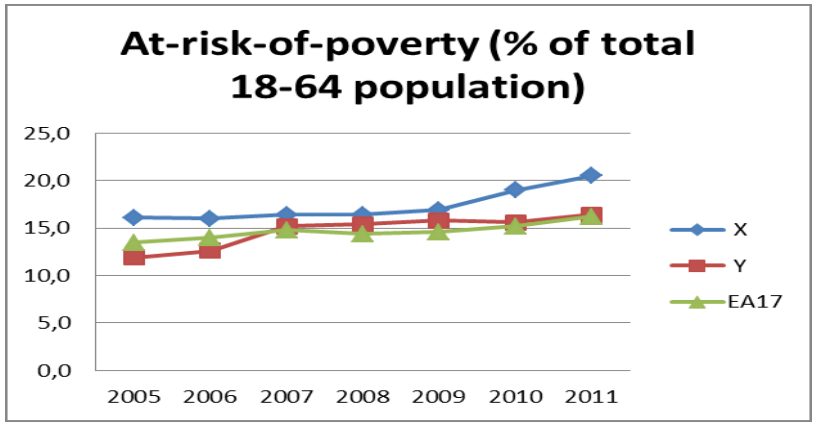
But: end of 2013: Commission Communication on **'Strengthening social dimension of the economic and monetary Union**'

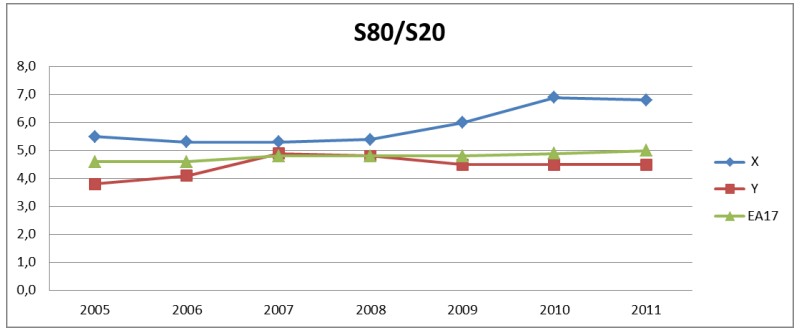
Austerity: the role of social indicators

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European Pillar of Social Rights

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Pres. Juncker State of the Union 2015:

> *"(…), I will want to develop a European pillar of social rights, which takes account of the changing realities of Europe's societies and the world of work. And which can serve as a compass for the renewed convergence within the euro area*."

Proclaimed by European Parliament, Council and Commission on Social Summit in Gothenburg November 2017

20 principles around 3 themes:

- equal opportunities and access to the labour market
- Fair working conditions
- Social protection and social inclusion

Focus on upward social convergence

Social scoreboard

- **detect** key employment and social problems and to **assess** convergence or divergence patterns across Member States
- Used in the European Semester (Joint Employment Report – Autumn Package)

Benchmarking: minimum income, pension adequacy,

The social scoreboard

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Equal Opportunities
Early leavers from education and training: Share of people aged 18–24 with at most lower secondary education and not in further education or training. [1, 2]
Digital skills: Share of individuals aged 16–74 who have basic or above-basic overall digital skills. [1, 2]
NEET rate: Young people aged 15–29 neither in employment nor in education and training. [1, 2]
Gender employment gap: Difference in employment rates between men and women (aged 20–64). [1, 2]
Income quintile share ratio (S80/S20): Ratio of the total income received by the top 20% of the population to that received by the bottom 20%. [1, 2]
Fair Working Conditions
Employment rate: Percentage of the population aged 20–64 in employment.
Unemployment rate: Percentage of the active population aged 15–74 without work.
Long-term unemployment rate: Share of people unemployed for 12 months or longer (aged 15–74).
Disposable income: Real gross disposable income of households per capita growth/index. [1, 2]
Social Protection and Inclusion
At-risk-of-poverty or social exclusion rate (AROPE): Share of people at risk of poverty, severely materially/socially deprived, or living in households with very low work intensity.
Child AROPE: At-risk-of-poverty or social exclusion rate specifically for children aged under 18.
Impact of social transfers: Reduction in poverty achieved by social transfers (excluding pensions).
Disability employment gap: Difference in employment rates between persons with and without disabilities.
Housing cost overburden rate: Share of the population living in households where total housing costs represent more than 50% of disposable income.
Formal early childhood education and care: Children aged less than 3 years enrolled in formal childcare.
Self-reported unmet medical care: Share of people aged 16 and over reporting unmet needs for medical

The Social Scoreboard

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Table 1. Summary of headline indicators of the Social Scoreboard

	Equal opportunities and access to the labour market					Dynamic labour markets and fair working conditions					Public support / Social protection and inclusion			
	Early leavers from education and training	Gender employment gap	Income quintile ratio	At risk of poverty or social exclusion rate	Youth NEET rate	Employment rate	Unemployment rate	Long-term unemployment rate	GDHI per capita growth	Net earnings of a full-time single worker earning AW	Impact of social transfers on poverty reduction	Children aged less than 3 years in formal childcare	Self-reported unmet need for medical care	Individuals' level of digital skills
Year	2019	Q2-2020	2019	2019	Q2-2020	Q2-2020	Q2-2020	Q2-2019	2019	2019	2019	2019	2019	2019
Best performers	EL, HR, IE, LT, SI	FI, LT, LV	BE, CZ, SI	FI, SI	CZ, NL, SE	CZ, DE, NL, SE	CZ, PL		EE, HU, LT, RO	DE, IE, LU, NL	AT, DK, FI, SI	BE, DK, ES, NL, LU		DE, DK, FI, NL, SE
Better than average	CZ, EE, IR, PL, PT, SE	AT, DE, DK, FR, LU, PT, SE, SI	AT, DK, EL, FI, MT, NL	AT, CY, DE, DK, HR, NL, PL, SK	DK, EE, LU, LV, MT, PL, SI	DK, EE, FI, LT, LV, MT, PL	BE, DE, FR, HU, IE, IT, MT, NL, PT	CZ, DK, EE, FR, HU, NL, PL, PT	CZ, SE, SK	BE, CY, FI, FR, SE	BE, CZ, FR, LT, SE	MT, PT, SE, SI	AT, CZ, DE, ES, LT, LU, MT, NL	AT, CZ, EE, EL, HR, IE
On average	AT, BE, DE, DK, FR, LV, NL, SK	BE, BG, EE, ES, HR, IE, NL, SK	DE, EE, HR, HU, LU, PL, PT	BE, HU, LU, PT	BE, FI, HU, LT, PT, SK	CY, FR, HU, LU, PT, SI, SK	AT, BG, CY, DK, FI, HR, LU, RO, SI, SK	AT, BE, BG, CY, FI, HR, IE, LV, RO, SE, SI	DE, DK, HR, FI, LV, PT, SI	EL, MT	CY, DE, NL, PL	EE, CY, DE, LV, FI	BE, BG, CY, HR, HU, PL, PT, SE, SI	BE, ES, FR, LT, MT, PT, SI, SK
Good but to monitor				CZ, FR				MT		AT				LU
Weak but improving	IT, RO	EL	LT	EL, LT	RO	HR		EL, ES, IT		BG, HU, LT, LV, PL, RO	LV	LT	EE, LV	
To watch	CY, HU, LU	CY, CZ	CY, ES, SE	EE, ES, MT, SE	AT, EL, FR, HR, IE	AT, BE, BG, IE, RO	EE, LT, LV, SE	LT, LU, SK	BE, IE, FR, NL	CZ, EE, ES, HR, IT, PT, SI	EE, HR, HU, LU, MT	AT, BG, EL	DK, FI, RO	CY, HU, PL
Critical situations	BG, ES, MT	HU, IT, MT, PL, RO	BG, RO	BG, LV, RO	BG, CY, ES, IT	EL, ES, IT	EL, ES		AT, CY, ES, IT	SK	BG, EL, ES, IT, RO	CZ, HR, HU, PL, RO	EL	BG, LV, RO

Europe 2020 and indicators: some conclusions

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- **Target not reached**, although improvement over last years (but not in AROP), but:
  - ➢ enhanced visibility
  - ➢some accountability
- From indicators to **more focused monitoring** tools and steps towards
- **benchmarking** (at the expense of the use of the broader set of indicators)
- **increased balance** in governance process between social policies and other strands
- **Key-role of social monitoring** in governance process (use in different components of European Semester: JER, Country reports)

Commission Von der Leyen I

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Focus on Green Deal and Digital

Green deal

- Climate neutrality by 2050
- Economic growth without exhaustion of raw materials
- Leaving no one behind (focus on most hit regions)

Sociaal Policy: i.a.

- Action Plan for the implementation of the European Pillar of Social Rights
- Council Recomendation European Child Guarantee (2021)
- Directive Minimum wages (2022)
- Council Recommendation Long Term Care (2022)
- Council Recommendation Minimum Income (2023)
- Directive Platform work (2024)

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SURE, EU unemployment (re)insurance (via EU obligations) (2020)

Recovery and resilience facility

- 672 bio in loans and subsidies
- Need to support Annual Sustainable growth strategy
  - Environmental sustainability
  - Productivity
  - Fairness
  - Macro-economic stability

Monitoring: ad hoc data collections in Member States, Additional Questions (on voluntary basis) in EU-SILC

Action Plan on the implementation of the European Pillar for Social Rights (March 4th 2021)

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3 new targets:

- **At least 78%** of people aged 20 to 64 should be in employment.
- **At least 60%** of all adults should participate in training every year.
- The number of people at risk of poverty or social exclusion should be **reduced by at least 15 million**. (of which 5mio among children), based on AROPE

Extension of social scoreboard: new headline indicators on adult learning, child poverty, disability employment gap, and housing cost overburden

New economic governance framework: Medium Term Fiscal Structural Plans (2024)

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- Fiscal path based on net-expenditure as central indicator
- 4-year time frame, but extendable to 7 years
- Establishing an evolution towards deficit (3%) and debt (60%) objectives
- Show which reforms and investments will contribute to objectives
- Taking account **of Common objectives**:
    - ➢European Pillar of Social Rights
    - ➢Green and digital transitions
    - ➢Energy safety
- Annual Progress Report
- **Social Convergence Framework**
- Integrated in European Semester

Social Convergence Framework

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Based on Regulation on Economic Governance (Regulation (EU)2024/1263)
Two stages:

- First stage based on Social Scoreboard: Identifying Member States with 6 or more headline indicators flagging ‘critical situation’ or ‘to watch’ (approx. description - see Joint Employment Report for full description)
- In depth analysis by European Commission for MS ‘at-risk for social convergence’ – identification of MS with real threats for social convergence

Results to be inserted in European Semester (Country Reports, CSRs)

New European Semester

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July 2025 Medium Term Fiscal Structural Plans

November: Autumn Package

- Joint Employment Report, incl Social Convergence Framework (1st stage)
- Eurozone Recommendation
- Alert Mechanism Report
- Commission Communication on Autumn Package
- Assessement of MTFSPs

April: Annual Progress Report

Multilateral Implementation Reviews, incl. Social Convergence Framework

May/June: Country Reports

June Country Specific Recommendations

Commission Von der Leyen II

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- **Anti-poverty strategy**
  - strengthening monitoring tools: timeliness, affordability, …
  - eradication of poverty by 2050

- **Action plan European Pillar of Social Rights**
  - platform administrative data

Overall conclusion: from the margins to (more) centre stage

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- Social indicators are established in the governance process
- Gradually more political role
- Allowed to bring more balance in country specific recommendations
- Driving forces:
    - Crises
    - Political pressure
    - Quality of data and indicators

However:

- Tension between policy domains remains

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Thank you !