



# Policy Roadmap

*for the implementation of the  
Social Investment Package*

*August 2015 version*

*Employment,  
Social Affairs  
and Inclusion*

## Policy Roadmap for the implementation of the Social Investment Package

The European Union is facilitating Member States' progress towards implementing the Social Investment Package through enhanced analysis and monitoring of Member States' policies and social outcomes in the framework of the European Semester, providing financial assistance, and streamlining its governance and reporting. These activities will support Member States' policy reform to help reach the objectives set in the Europe 2020 strategy to reduce the number of people living in poverty and social exclusion by at least 20 million by 2020. The below activities are those where action is planned to be undertaken by mid-2015.

### 1. Strengthening the social investment approach through the European Semester

Deliverable	Implementation Status/Milestones	Timeframe / deadline
<i>The Commission supports social policy reform as set out in the Social Investment Package (SIP) through the follow-up to recent Semesters and through dialogue with Member States in the Social Protection Committee about the trends to watch pinpointed by the Social Protection Performance Monitor (SPPM).</i>  <i>Relevant activities are detailed below.</i>		

	<b>Deliverable</b>	<b>Implementation Status/Milestones</b>	<b>Timeframe / deadline</b>
	<b>Methodology to support Commission monitoring, in the framework of the European Semester, of efficiency, effectiveness and the investment dimension of Member States' budgets for social policies</b>	A Social Protection Committee ad-hoc group on efficiency and effectiveness of social spending and financing arrangement has produced a report on these issues including the financing of different social protection functions. SPC <a href="#">report</a> on the financing and effectiveness and efficiency of social protection was adopted in November 2014.	<b>Published in March 2015</b>
	<b>A knowledge bank</b> to help policymakers and experts to share in an interactive manner social policy experiences and exchange information on what works and what doesn't	A first version was opened to a restricted group in September 2014 including 32 policy initiatives put forward by the European Social policy Network.	<b>2015</b>
	<b>A policy makers' manual for applying innovative approaches to long-term care provision</b>	<a href="#">Manual</a> was produced in cooperation with the Institute for Prospective Technological Studies of the Joint Research Centre and the Social Protection Committee Working Group 'AGE'	<b>Publication June 2015</b>
	<b>Closing the Gap: SPC report on the contribution of innovative approaches to long-term care</b>	The <a href="#">report</a> on Adequate social protection for long-term care needs in an ageing society jointly prepared by the Social Protection Committee and the European Commission services was adopted by the SPC on 20 May 2014 and its Key Messages were endorsed by the Council on 19 June 2014.	<b>Publication September 2014</b>
	<b>Project on health system efficiency</b>	Joint work with OECD <b>scheduled to start in</b> autumn 2015, which will result in expert seminars with policymakers and a published report.	<b>Final report Spring 2018</b>
	Independent advice on effective ways of <b>investing in health</b>	The <a href="#">first meeting of the expert panel on investing in health</a> took place in Brussels 11-12 July 2013. The panel continues.	<b>End-2015</b>

<p><b>Methodology on reference budgets</b> to help Member States ensure adequate income support</p>	<p>Will build on findings from <a href="#">Framework Programme 7</a> project on reference budgets</p> <p>A call for tender has been launched for an academic research consultation with the Social Protection Committee and its Indicators' Sub Group to produce:</p> <ul style="list-style-type: none"> <li>• Literature <a href="#">review</a> published on the Commission's website.</li> <li>• Draft of the <a href="#">common methodology</a> has been presented to ISG in June; Updated version presented to the ISG in November 2014</li> <li>• Final <a href="#">conference</a> on methodology and results</li> <li>• Presentation of the final results to ISG and SPC</li> <li>• Reference budgets for 3 types of households for capital regions of 18 MS</li> </ul>	<p><b>Final report due 2<sup>nd</sup> half 2015</b></p> <p><b>August 2014</b></p> <p><b>November 2014</b></p> <p><b>2 June 2015</b></p> <p><b>September 2015</b></p> <p><b>October 2015</b></p>
<p><b>"Portraits of individuals with no or limited labour market attachment"</b></p>	<p>Joint project with the World Bank in 6 countries, with the aim of supporting policy work within the European Semester by developing knowledge on active inclusion strategies at national level.</p>	<p><b>Publication September 2014</b></p>
<p><b>Council Recommendation on enhancing effectiveness of measures to achieve Roma integration in the Member States</b></p>	<p><a href="#">Adoption by Council</a></p>	<p><b>ADOPTED - December 2013</b></p>
<p>Commission Communication, 'Steps forward in Implementing National Roma Integration Strategies'</p>	<p><a href="#">Communication</a> focussing on practical preconditions of implementation</p> <p>Annual report (<a href="#">Communication</a>) on implementation of EU framework for National Roma Integration Strategies – yearly deliverable</p> <p>ROMACT programme (capacity building for local authorities)</p>	<p><b>June 2013</b></p> <p><b>ADOPTED in April 2014</b></p> <p><b>2013 - 2017</b></p>

		<a href="#">Handbook</a> on using EU funds for Roma inclusion	<b>April 2015</b>
	The European Platform on Investing in Children to identify, evaluate and report on good practices for investing in children, in particular related to ECEC, parenting support, and child participation, as well as monitor the implementation of the Recommendation on Investing in Children.	The <a href="#">EPIC website</a> was launched in February 2013, integrating and extending the work of the Alliance for Families including a repository with evidence based practices steadily growing as the country profiles have been updated and provide access to relevant studies and other links.	<b>February 2013 – September 2016</b>
	Conference on the Social Investment Package with the Irish Presidency to communicate the policy guidance of the social investment package and draw together efforts to support implementation	Results of conference available <a href="#">here</a> – conclusions on implementation	<b>May 2013</b>
	Annual Convention of the Platform against Poverty and Social Exclusion	The 2013 and 2014 conventions were focussed around the thematic priorities of the social investment package, to help policymakers and stakeholders share policy lessons and good practice on how to combat poverty. The 2014 event also had a dedicated workshop on how to improve the involvement of key social stakeholders in the European Semester.	<b>26-27 November 2013</b> <b>20-21 November 2014</b>
	Conference on social entrepreneurship, ‘Social entrepreneurs: have your say’	The <a href="#">event</a> included a workshop specifically on 'Social Policy Investment and Social Entrepreneurship', social innovation informs many of the event's activities	<b>16-17 January 2014</b>
	Conference on Social Policy Innovation	<a href="#">Conference</a> on Social Policy Innovation	<b>19+20 May 2014</b>

## 2. Making the best use of EU funds to support social investment

	Deliverable	Implementation Status/ Milestones	Forecast timeframe
<p><b>The Commission will support Member States to implement the Social Investment Package through mobilising its financial resources. Member States will take into account the Social Investment Package in the programming of EU funds, especially the ESF, for the period of 2014-2020.</b></p>			
	Policy guidance on the use of ESI funds to support implementation of social investment	Addressed to Commission staff and MS Managing Authorities involved in preparation of Operational Programmes and Partnership Agreements for 2014-2020 ESI funds	<b>COMPLETED</b>
	Identifying social innovation and social investment priorities for Horizon 2020, the EU's 2014-2020 nearly €80 billion programme for research and innovation	In 2014, Horizon 2020 launched a call for proposals supporting research on innovative social investment approaches for the modernisation of social policies and services. Successful projects have been selected and will run until 2020.	<b>2014-2020</b>
	Support MS in the design of reform strategies for more cost-effective social protection systems (based in particular on cooperation with international organisations and other Member States)	To be supported through call for proposals under Employment and Social Innovation (EaSI) Programme	<b>Results in March 2015</b>
	Assessment of the effectiveness of conditional cash transfers for improving children's outcomes	<a href="#">Results</a> of the study can be found on the following link.	<b>Peer review seminar in 2015</b>
	Study on effective policies to reduce homelessness and housing exclusion	<ul style="list-style-type: none"> <li>• The right to housing - homelessness prevention in the context of evictions. Publication and launch seminar expected end-2015</li> <li>• Building expertise on preventing and tackling homelessness and housing exclusion through mobilising social housing policy measures, with OECD</li> <li>• <a href="#">Work in Stations</a> project supporting integration of homeless people around train stations by creating partnerships between local authorities, railway companies, and NGOs</li> </ul>	<p><b>October 2015</b></p> <p><b>2<sup>nd</sup> half 2015</b></p> <p><b>April 2013</b></p>

	<ul style="list-style-type: none"> <li>• <a href="#">Study</a> on the relation of mobility and migration with destitution in the EU</li> <li>• <a href="#">Peer review</a> on “Housing First” in Denmark</li> <li>• EU <a href="#">study</a> on cost-efficient housing policies in Europe and in Flanders – expert meeting in May 2015</li> </ul>	<p><b>September 2014</b></p> <p><b>November 2013</b></p> <p><b>to be finalised in 2016</b></p>
Support to stakeholders through calls for proposals in line with the social investment approach.	<p>2013 PROGRESS <a href="#">call for proposals</a> Projects selected will run till 2016-2017.</p> <p>First EaSI <a href="#">call for proposals</a> published. Projects selected will run till 2017-2018.</p>	<p><b>2016-2017</b></p> <p><b>2017-2018</b></p>
<b>Providing support services for actors engaged in social policy experimentation, including innovative social enterprises</b>	Support actions to MS authorities and other stakeholders (presentations, training, guide and advice function).	<b>December 2015</b>

### 3. Streamlining governance and reporting

Deliverable	Implementation Status	Timeframe
<p><b>The Commission will support Member States through enhanced monitoring of outcomes, building on the Social Protection Performance Monitor, and working together with the European Statistical System through more accurate and timelier statistics on poverty and outcomes of social and health policies, to help improve monitoring of social situations and better targeting of social policy interventions.</b></p>		
<p>Employment and Social Developments in Europe Annual Review, with dedicated focus on efficiency and effectiveness and gender equality, which provides analytical support for policy development and monitoring.</p>	<p>The 2013 <a href="#">Employment and Social Developments in Europe Report</a> featured a dedicated chapter on the efficiency and effectiveness of social spending. The publication also featured a chapter on barriers to women's participation in the labour market, and one on the efficiency and effectiveness of social protection systems.</p> <p>The 2014 ESDE featured a dedicated chapter on investing in human capital and responding to long-term society challenges, highlighting the importance of preventative and capacitating social policies such as early childhood education and care services.</p>	<p><b>January 2014</b></p> <p><b>January 2015</b></p>
<p><a href="#">Report</a> on progress towards the achievements of the Barcelona targets,</p> <p>EIPA seminars</p>	<p>Report is published by DG JUST to support Member States' efforts to invest in early childhood education and care (ECEC)</p> <p>The seminars were held in MS with child-related country-specific recommendations. 8 seminars took place in IT, EL ES, HU, RO, LV, BU, IR.</p> <p>For 2015 four (4) more national seminars are planned in PL, SK, PT and HR.</p>	<p><b>June 2013</b></p> <p><b>Sept - Dec 2014</b></p> <p><b>2015</b></p>
<p>Annual Report on Progress on Equality between Women and Men, and dedicated reports to specific issues concerning gender equality in employment and social fields</p>	<p>The latest <a href="#">Annual Report</a> was published in March 2015.</p> <p>Dedicated reports released since 2013:</p> <ul style="list-style-type: none"> <li>• '<a href="#">Starting Fragile</a>: gender difference in the youth labour market'</li> <li>• 'The <a href="#">gender gap</a> in pensions in the EU'</li> </ul>	<p><b>2013-2015</b></p>



	<ul style="list-style-type: none"> <li>• <a href="#">‘The role of men in gender equality’</a> – European strategies and insights’</li> <li>• ‘The <a href="#">impact</a> of the economic crisis on the situation of women and men and on gender equality policies’</li> <li>• <a href="#">‘Mid-term review</a> of the Strategy for Equality between women and men (2010-2015)</li> <li>• <a href="#">Progress report on the Barcelona objectives</a> for childcare</li> </ul>	
Study to assess the financial, economic and social returns on different forms of social investment,	To develop further evidence concerning the social investment case and support evidence-based policy choices.	<b>Launched in January 2015 by the University of Amsterdam, expected completion in January 2016</b>
Family Database	Contract to support the OECD in maintaining and developing the <a href="#">family database</a> , with focus on vulnerable children.	<b>2014-2016</b>
Assessing Member States’ social situations and social policy reforms through the Social Protection Committee Annual Reports	Assessments presented in the SPC reports as follows: <ul style="list-style-type: none"> <li>• <a href="#">SPC Annual Report on the social situation in the EU 2014</a> including country profiles</li> <li>• <a href="#">Review of recent social policy reforms for a fair and competitive Europe - 2014</a></li> </ul>	<b>March 2015</b> <b>October 2014</b>
Providing support for policy development and monitoring through better statistical data	<p>Making use of the latest data on the full list of material deprivation items from the EU-SILC ad-hoc modules, the Commission will develop proposals for the review of the material deprivation indicator, which is also a component of the 2020 poverty and social exclusion target.</p> <p>The Commission has developed a methodology to calculate the gender pension gap with the help of the Commission's network of gender equality experts and the Social Protection Committee's Indicator's Sub-Group.</p> <p>EU-SILC 2015 will feature an ad-hoc module on social and cultural participation and material deprivation.</p> <p>The Commission will pursue the proposals for data and indicators' development identified in the EC-SPC 2014 report on "Adequate social protection for long-term care needs in an ageing</p>	<b>Second half 2015 onwards</b>  <b>2014 - 2015</b>  <b>2015</b>  <b>2015 - 2016</b>

	<p>society" and follow up on the work of the SPC-AGE WG on LTC.</p> <p>Following the SIP call for more up-to-date statistics on the social situation in Member States, the timeliness of social statistics has been improved and will be improved further, including through the exploration of flash estimates based on now-casting (e.g. EU-SILC).</p>	<b>2015 - 2016</b>
Further development of Joint Assessment Framework (JAF) quantitative tool	<p>Following the development in 2013 of an assessment framework in the area of health based on the Joint Assessment Framework methodology, and the subsequent review of the framework in 2014, the Commission will continue to support the development of the OMC health strand and work further on the identified areas for indicator development. The JAF Health will be tested over the course of 2015 in cooperation with the Social Protection Committee's Indicators' Sub Group.</p> <p>The Commission will further develop indicators for monitoring better developments in the income situation in the different parts of the income distribution, and follow studies and assessments of the JAF methodology in view of its improvement and further development.</p>	<p><b>2015 - 2017</b></p> <p><b>2015 - 2016</b></p>
Further development of Active Ageing Index	<p>Follow-up project with the United Nations Economic Commission for Europe to further develop the Active Ageing Index, to help policymakers recognise the untapped potential of older people.</p> <p>A new wave of the AAI was calculated for 2014, and the results will be released in October 2014.</p> <p><a href="#">Paper</a> on active ageing trends in Europe.</p> <p>A <a href="#">call for papers</a> on "Building the evidence-base for active ageing policies, with the use of the AAI" led to over 30 papers from several EU and non-EU countries; these were presented at an international seminar in April 2015. More details are available on the project <a href="#">wiki</a>.</p>	<p><b>Final report February 2016</b></p> <p><b>October 2014</b></p> <p><b>April 2015</b></p> <p><b>April 2015</b></p>
Adapting <a href="#">WHO global guide on age-friendly cities</a> to the EU context and establishing an EU network of age-friendly cities	Joint <a href="#">Project</a> with World Health Organisation	<b>Publication and <a href="#">conference</a> planned for December 2015</b>
Supporting social enterprises' access to finance: European Social Entrepreneurship Funds	<a href="#">Regulation</a> on European social entrepreneurship funds	<b>Adopted 17 April 2013- Fully in force since 22</b>

			<b>July 2013</b>
	Protecting people against financial difficulty	Proposal for a <a href="#">Directive</a> on the comparability of fees related to payment accounts, payment account switching and access to payment accounts with basic features	<b>Published by Commission on 5 May 2013</b>
	Improving access to information for citizens	Proposal for a <a href="#">Directive</a> on the accessibility of public sector bodies' websites	<b>Published by Commission on 3 December 2012</b>
		Update of the <a href="#">current social protection guides</a> to make information about access to social benefits and services more easily accessible to citizens	<b>Publication June 2014</b>
		Proposal for a <a href="#">Directive</a> on measures facilitating the exercise of rights conferred on workers in the context of freedom of movement for workers	<b>Published by Commission on 26 April 2013</b>
	<a href="#">Open days seminar on accessible quality care services</a>	Seminar on "Removing barriers to women's labour market participation through accessible, quality care services"  Link to main conclusions: <a href="http://ec.europa.eu/social/main.jsp?langId=en&amp;catId=88&amp;eventsId=1012&amp;furtherEvents=yes">http://ec.europa.eu/social/main.jsp?langId=en&amp;catId=88&amp;eventsId=1012&amp;furtherEvents=yes</a>	<b>8 October 2014</b>