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European Association Working for Carers

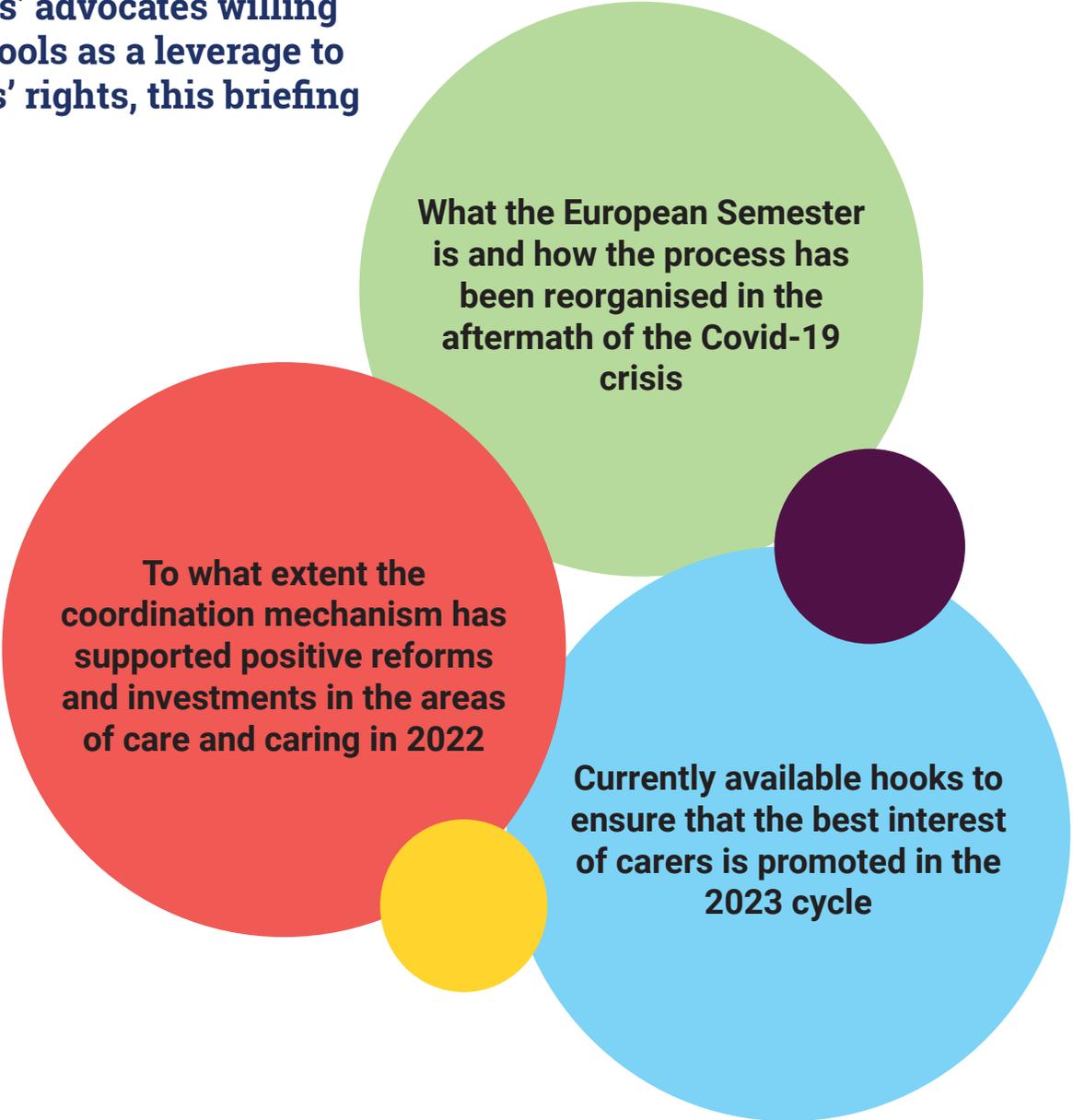
Eurocarers' Briefing

December 2022

The European Semester new opportunities for carers' advocacy

**For carers' advocates willing to
use the EU tools as a leverage to
advance carers' rights**

Aimed at carers' advocates willing to use the EU tools as a leverage to advance carers' rights, this briefing presents:



What the European Semester is and how the process has been reorganised in the aftermath of the Covid-19 crisis

To what extent the coordination mechanism has supported positive reforms and investments in the areas of care and caring in 2022

Currently available hooks to ensure that the best interest of carers is promoted in the 2023 cycle

Why should carers and organisations representing them keep an interest in the European Semester given that the **European Union has just adopted a Strategy specially dedicated to Care?**

The EU Semester is the EU framework for the coordination and surveillance of economic and social policies. It is a central coordination instrument which impacts a wide range of key policies, defines priorities for investment in a context of constrained public resources, and supports convergence across EU countries. The Semester serves to monitor and compare diverse economic, fiscal and social situations as well as the reforms put in place by EU governments to achieve economic and social development.

This briefing is therefore addressed at carers' organisations and research organisations who are willing to use and build on relevant EU processes to inform public (care) policies in their countries. While taking into account the objectives introduced by the European Care Strategy, this document provides guidance on how to navigate the seemingly complex process that is the EU Semester. Building on an analysis of the Semester package 2022, it offers a series of pointers for improvement, as well as some advice on how to get involved in the process at national level.

Eurocarers' assessment is based on a review of the Semester documents for each EU member state, which allowed to identify relevant content from the point of view of carers, in particular in relation to health, long-term care, pensions, gender equality, employment and digitalisation. This analysis has been conducted every year since 2015, thereby providing us with a longitudinal overview of the way care has been approached as a policy topic over time. It is available via the link below:

[Eurocarers' review of the Semester documents 2022](#)

What is the Semester and how does it work ?

Aim and method

The European Semester is a yearly process coordinated by the European Commission since 2011, which is used to discuss member states' fiscal, economic, employment and social policies. While initially designed to ensure that EU governments pursue sound public finances and coordinate their fiscal policies, in line with the set of rules defined in the Stability and Growth Pact (SGP), its scope has progressively been widened and the process has become central to the monitoring and implementation of employment, social, health and even environmental policies at both EU and national level. Moreover, the Semester also serves to inform the allocation of EU funds. This is particularly the case since the proclamation of the [European Pillar of Social Rights \(Social Pillar\)](#) in 2017 and the corresponding [Action Plan](#) in 2021.

Given its scope and primary objectives, the Semester process does not explore in detail the policies that are of most relevance to informal carers. Nevertheless, it provides important indication as to the level of priority given to care-related issues, and how these fit into the overall policy agenda and investment plans.

The Semester cycle across the year

In April of each year, member states are expected to present their **national reform programme** to the European Commission. In their programme, governments report on the specific policies that they are implementing and/or intend to adopt in order to boost employment and economic growth, prevent or correct macroeconomic and fiscal imbalances, and address major socio-economic issues.

In May, the Commission then publishes a **country report** on each member state, which offers an analysis of their economic and social developments, challenges and measures taken to address them. The reports also provide a forward-looking analysis of member states' resilience.

Together with the country reports, the Commission presents a series of proposed **country-specific recommendations** to Member States, to be subsequently endorsed by the Council (i.e. competent EU Ministers). Once endorsed, governments are expected to incorporate the recommendations into their national reform plans and budgets for the following year.

The Semester as a guide on the implementation of the Recovery and Resilience Plans

In 2021, in its efforts to mitigate the economic and social impact of the COVID pandemic and in its ambition to make European economies and societies more sustainable, resilient and better prepared for the challenges and opportunities of the green and digital transitions, the EU put an unprecedented volume of funding at the disposal of member states. This 'Recovery and Resilience

Facility', which amounts to EUR 723.8 billion aims to support the reforms and investments enshrined in **national recovery and resilience plans for the period 2021-2026**. In addition to this new funding, the enforcement of fiscal rules was suspended and the Commission encouraged member states to pursue an expansionary fiscal policy¹.

Under these particular circumstances, the Semester was temporarily suspended in 2021 so as to focus on developing the Recovery and Resilience Facility. The process has resumed for the 2022 cycle and is now functioning alongside the Recovery and Resilience Facility. More specifically, it focuses on the issues that are not - or only partly - addressed by the Recovery and Resilience national plans, and aims to complement them and guide their implementation.

As raised by civil society organisations, the integration of the Recovery and Resilience funding instrument, generally steered by economic and finance ministries or Prime Ministers' offices, in the Semester cycle gave even more weight than before to macroeconomic and financial actors, thereby aggravating a pre-existing imbalance between economic objectives on the one hand and social objectives on the other (Social Platform, 2022). It has also reduced the involvement of social stakeholders, in particular in 2021. The lack of transparency and participation of stakeholders remains a weakness of the process to this day.



Long-term care is an important topic for Resilience and Recovery Plans but a more comprehensive approach and dedicated investments are still needed

The progressive consolidation of the EU ambition in the area of long-term care and caring (see below) gives it a rightful place in the EU agenda.

Strengthened EU ambition on Long-Term Care: recent developments



The European Pillar of Social Rights (2017), includes the right to affordable long-term care services of good quality, in particular home-care and community-based services, as the 18th of the 20 principles guiding the reinforcement of a social aspect of the European Union.



The Social Pillar Action Plan (2021) foresees an initiative on Long-term care in 2022 to set a framework for policy reforms to guide the development of sustainable long-term care that ensures better access to quality services for those in need.



The EU Care Strategy (2022) aims to ensure quality, affordable and accessible care services across the European Union and improve the situation for both care receivers and the people caring for them, professionally or informally. The Strategy is accompanied by a [Council Recommendation on access to affordable high-quality long-term care](#).

Eurocarers has been pleased to see care and caring issues benefiting from increased attention in the Semester in the last few years (Eurocarers, 2019). Yet, when it comes to its transposition in the investment planned, our review of the Recovery and Resilience plans in 2021 shows a mixed picture, with some plans reflecting a comprehensive approach to long-term care, based on the three dimensions of access, quality and community-based care, while others make no (or extremely limited) reference to long-term care. Overall, long-term care remains a weak element in recovery investments (Eurocarers, 2021).

2022 Semester: long-term care on the agenda, but with a lack of ambition

While the Recovery and Resilience Plans sketch the main priorities for investment for the period 2021-2026, the yearly Semester complements this programme by pointing the challenges that are insufficiently addressed. Was this the case for long-term care issues, of which the growing severity and importance are now clearly established?

While the present briefing does not seek to provide a comprehensive analysis of the numerous Semester and Recovery and Resilience Plans documents, Eurocarers' rapid review of the 2022 cycle allows to shed light on the main weaknesses and opportunities from the perspective of carers.

Long-term care is on the agenda in (almost) all countries

On a positive note, long-term care appears in the Country-Specific Recommendations addressed to a series of countries, either in the Recommendations themselves (Austria, Belgium, Estonia, Poland, Slovenia, Czech Republic, France) or in the recitals – i.e. the section of the document that explains its purpose (Finland, Ireland, Latvia, Portugal). Long-term care is mentioned in the Country Reports of most of the other countries.

In a majority of cases, the Commission seems to push for the reinforcement of envisaged efforts to enhance long-term care, as described in the national Recovery and Resilience Plans. But the European Commission also does not hesitate to point out plans that are considered unsatisfactory, such as in the case of Finland, for example, where “more efforts are needed, most notably on the access to health and long-term care services”².

A comprehensive approach to long-term care appears for some countries, against the backdrop of a dominant fiscal approach

Originally, the Semester primarily looked at long-term care systems through the lens of financial sustainability, to the detriment of an analysis of their adequacy with regard to people's needs and rights. Today, **a more comprehensive approach that encompasses quality, affordability and accessibility is visibly gaining ground**. For instance, it guides the analysis of the systems in place in Belgium and in Estonia, where “a comprehensive reform of long-term care can ensure access to affordable and quality formal long-term care(...) helping those in need by focusing on efficient and sustainable funding for long-term care, access to integrated care services, setting quality standards, and ensuring sufficient and skilled workforce.”

However, the persistence of a vision where long-term care - like pensions - is seen as a cost that is expected to rise due to population ageing is questionable at the very least. For some countries, this remains the only lens through

which long-term care is considered (Denmark, Germany, Luxembourg, the Netherlands), as opposed to a vision approaching care as a potential driver of job creation and innovation.

Informal carers remain completely invisible in many countries

Regrettably, while the topic of long-term care is now discussed in almost all countries, it seems that informal care is not always gaining as much attention. The phrase ‘informal carer’ indeed only appears in the documents of 8 countries (France, Ireland, Italy, Latvia, Luxembourg, Malta Poland Portugal, Slovenia), which illustrates the persisting invisibility of those who provide the bulk of care across the European Union.

A missed opportunity to check on carers’ work-life balance.

In the last few years, work-life balance policies have been identified as key to helping informal carers access and retain employment. The Semester could provide a useful annual snapshot of the progress made by Member States to achieve the EU objectives defined three years ago as part of the Directive on Work-Life balance for parents and carers (Eurocarers, 2019). Sadly, carers’ work-life balance is only mentioned in 8 of the country documents (Czech Republic, Estonia, Greece, Hungary, Italy, Luxembourg, Poland, Romania).

Informal care as a driver of gender inequalities is overlooked

The Semester reaffirms the gender equality objective pursued by the European Union. Yet, the fact that women provide the bulk of informal care (especially when it comes to the provision of intense care), and are therefore comparably more likely to face negative health and socio-economic consequences, remains in a blind spot. Indeed, the role of women as informal carers is mentioned only in a few countries (Austria, Estonia, Greece, Hungary, Latvia, Luxembourg, Poland),

whereas their parenting role is much more frequently taken into consideration. Pensions’ inadequacy is raised in one third of the member states

As in previous years, pensions rightly draw a lot of attention, mainly in relation to the financial sustainability of national pensions’ systems, and the potential risks for member states’ budgets. For some countries though, principally in Eastern European and Baltic countries, the European Commission points out the overall inadequacy of the systems in place (Bulgaria, Croatia, Czechia, Latvia, Lithuania, Luxembourg, Poland, Slovenia). Access to pension rights is an issue of major concern for informal carers given the (gender) pension gap generated by caregiving. Carers (and organisations representing them) could take advantage of ongoing debates and reforms to advance their rights, as is the case in Ireland⁴.

The integrated care perspective is lacking

As in previous years, health is given marked attention across Member States, and the combination of the Semester and the Recovery and Resilience Plans is likely to facilitate progress in public health. Against a background of competing priorities and pressure on public resources, this priority will have to be maintained in the coming years for reforms to achieve sustainable results. (EuroHealthNet, 2022)

Disappointingly enough, even though the Care Strategy rightly calls for a “strategic and integrated approach to care”, a silo approach continues to prevail in the Semester as health and long-term care policies continue to be considered separately. For example, the pursuit of ‘integrated care’ as a policy objective appears only in the documents of five countries (Croatia, Czechia, Estonia, Italy, Latvia). The support expected by informal carers requires innovative reforms that overcome the boundaries between social, health and long-term care policies and actors, centred around people’s needs. The Semester should set out this direction more clearly, inviting Member States to make use of the new flagship project “Towards person-centred integrated care” within the Technical Support Instrument provided by the European Commission .

How carers' organisations can use the Semester?

As it presents itself, the Semester falls short and fails to meet the expectations of the European carers' movement. This demonstrates the difficulty of bringing a comprehensive approach to care and caring (including informal care) to the fore of policy debates. Still, the Semester process offers a clear added value: by enshrining long-term care in policy agendas, it offers various entry points for carers' organisations to promote their message. The conjunction of the European Care Strategy - which brings an ambitious and comprehensive approach to care- and of the Semester- which connects long-term care to economic and social development - creates a rare opportunity to revitalise advocacy efforts. Carers and carers' organisations who wish to take advantage of this 'alignment of the planets' will find a few hints below.



Taking stock of the outcomes of the 2022 Semester cycle



Check what the Semester says about your country in the [Eurocarers' analysis](#). Is the situation accurately analysed when it comes to care and caring? Are the recommendations relevant?

Remember that the Semester now seeks to complement National Recovery and Resilience Plans, which remain valid until 2026 and have also been analysed by Eurocarers ([see here](#)).

Positive elements from both processes can potentially be used as leverage to advance carers' rights at national level, as well as to strengthen your requests for public grants. Inaccurate descriptions, lack of investment, insufficient recommendations can also be used to trigger a dialogue with the public authorities in charge of health and long-term care in your country, or even with the department directly in charge of the Semester process in your government. Check your country national reform programme ([accessible here](#)) for authorship and contact details.



Engaging in the 2023 cycle



The recently-launched EU Care Strategy is expected to have an impact on upcoming Semester cycles. When setting the priorities for 2023, EU institutions have indeed already underlined the need to make progress on long-term care.

"While progress was made during the pandemic, several Member States need to make further progress on the resilience, quality and accessibility of their healthcare and long-term care systems, including the challenge of shortages in the health workforce"

(EU Commission, 2022)

Reminding your public authorities that the Care Strategy considers informal carers as part of the workforce can provide you with a solid argument to request carers' participation in the discussions regarding your country's ongoing and future policies and reforms.



As regards participation, organisations should not hesitate to draw on the European Commission's repeated recommendations on improving governance and participation, as detailed on the Communication setting the objectives for 2023.

*The Commission is committed to an inclusive process and the timely involvement of social partners and other relevant stakeholders during the European Semester cycle. A sustainable recovery and the twin transition can only succeed if we act together, in close cooperation with all relevant stakeholders. The active involvement of stakeholders, through dedicated regular meetings, is important throughout all the stages of the European Semester and the RRF implementation process. **The Commission calls on all Member States to engage actively with social partners, local and regional authorities and other stakeholders, in particular representatives of civil society organisations, through regular exchanges. They should draw on the successful application of the partnership principle in cohesion policy programming and implementation. This helps to jointly identify challenges, improve policy solutions, and ensures broader ownership of the economic and social policy agenda. The Commission will make use of the existing forums under the European Semester to inform and involve social partners also on RRF implementation.***

(EU Commission, 2022)



Share your knowledge and experience through Eurocarers' channels

Your initiatives might inspire other Eurocarers' members and inform our collective work: please do share your experience with the Eurocarers' Secretariat who will ensure adequate dissemination (oj@eurocarers.org).

Note that the Secretariat can also channel civil society's contributions via the European Commission's Desk Officers in charge of the countries' analysis, with a view to complement official information: do not hesitate to share your publications (letters, position papers, studies...) as well as those of other relevant organisations.



Be aware of the timeline

Advocacy initiatives at national level will be all the more timely when they fit into the Semester calendar:



March-April: EU countries submit their National Reform Programmes to the European Commission;



May-July: each member state receives tailored policy recommendations



August-October: national governments incorporate the recommendations into their reform plans and national budgets for the following year



Build alliances

Informal care can not be seen as a standalone question. Addressing informal carers' needs calls for actions across a range of interconnected policy areas, including health and formal care services, employment, ICT, anti-discrimination... **Identifying allies** amongst the community of stakeholders in your country/region (e.g. Trade-Unions, local authorities, disability organisations, women's organisations, etc...) and contributing to advocacy platforms focusing on Care in general can only help informal carers to gain visibility, be involved and achieve a greater impact. Such platforms could be useful at national level to ensure the Care Strategy is implemented in a participative way, and that the Semester / Recovery process supports positive reforms in Care.



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Notes

1. A fiscal policy by which governments expand the money supply in the economy using budgetary tools to either increase spending or cut taxes, both of which provide consumers and businesses with more money to spend (IMF website, last checked in December 2022).
2. European Commission's Country Report for Finland
3. European Commission's Country Report for Estonia
4. [Ireland Reform Programme 2022](#)



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Contact:

Claire Champeix,

Policy Officer

cc@eurocarers.org

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