

How to activate the EU Semester

**TO SUPPORT AMBITIOUS
CARE POLICIES?**

Eurocarers' Briefing



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

The significance of the European Semester for carers, its operational mechanisms and its reinforcement through the Recovery and Resilience Fund.

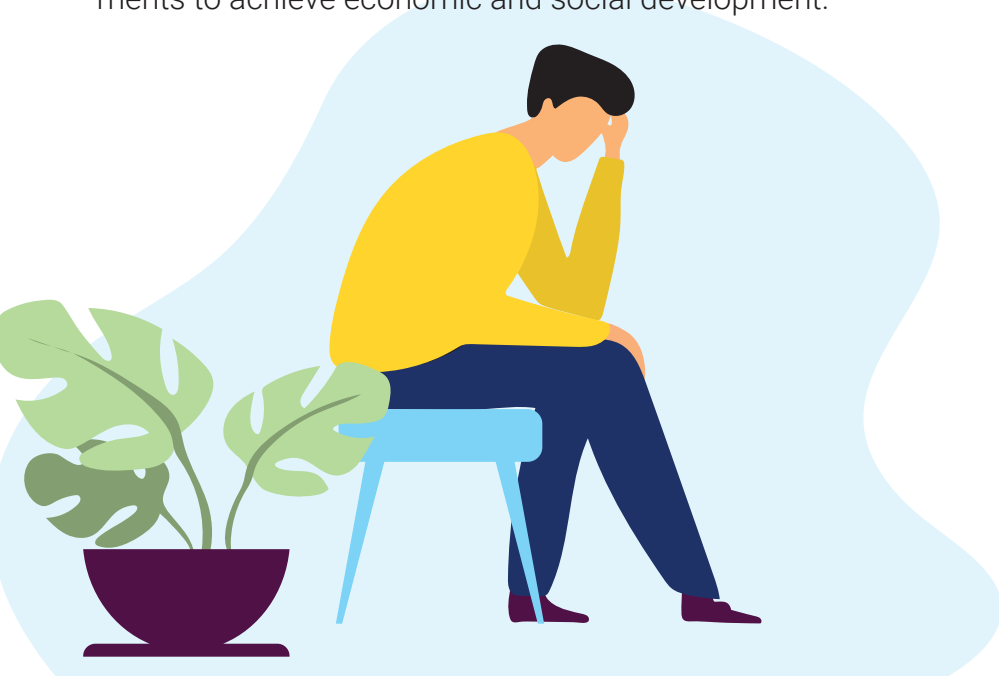
The alignment between the European Semester and the ambitions outlined in the European Union's Care Strategy. Our analysis builds on a review of Semester documents for each EU member state, allowing us to identify relevant content. This analytical approach has been consistently employed on an annual basis since 2015, providing us with a comprehensive longitudinal perspective on the evolution of care as a policy topic over time.

A positive case study from the Flanders Region in Belgium, illustrating how EU instruments can actively support an ambitious strategy

Eurocarers' review of the Semester documents 2023

Why the EU Semester is important for informal carers and how it works

The EU Semester is the EU framework for the coordination and surveillance of economic and social policies. It is a pivotal EU instrument that 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 country situations as well as the reforms put in place by EU governments to achieve economic and social development.



Overall, carers' organisations aiming to utilise the EU framework as a tool to promote comprehensive care policies in their respective countries or regions can build on three interdependent instruments:

- ✓ The **Care Strategy**, adopted in 2022, provides Member States with guidance on enhancing access to high-quality and affordable care services while improving working conditions and work-life balance for carers. The Strategy is complemented by a **Council Recommendation on access to affordable high-quality long-term care**.
- ✓ The **EU Semester**, established in 2011 and subject to annual reviews, facilitates the integration of long-term care reforms into the broader policy agenda of Member States; it monitors national reform and investment in key policy areas and makes recommendations for additional actions needed through country-specific recommendations.
- ✓ The **EU Recovery & Resilience Facility (RRF)** offers Member States grants or loans to implement reforms and investments, as defined in the pluri-annual National Recovery & Resilience Plans (NRRP).

The process

Aims and method

The European Semester, an annual process coordinated by the European Commission, has evolved throughout the years to encompass a broader range of policies, making it a pivotal mechanism for monitoring and executing employment, social, health and environmental policies at both the EU and national levels.

Despite not delving into the specifics of policies most pertinent to informal carers, the Semester process offers crucial insights into the prioritisation of care-related issues and their alignment with the overarching policy agenda and investment plans.

The annual cycle of the Semester (see fig 1)

In April of each year, Member States are required to submit their national reform programmes to the European Commission. These programmes detail the specific policies being implemented and/or planned to enhance employment and economic growth, prevent or rectify macroeconomic and fiscal imbalances, and address major socio-economic issues.

In May, the Commission releases a country report on each Member State, offering an analysis of their economic and social developments, highlighting challenges, and assessing measures taken to address them. The reports also include a forward-looking analysis of Member States' resilience. Together with the country reports, the Commission presents a set of proposed

country-specific recommendations for Member States. These recommendations are later endorsed by the Council (i.e. competent EU Ministers). Once endorsed, governments are expected to integrate the recommendations into their national reform plans and budgets for the following year.

In the Autumn, the European Commission publishes the "autumn package" of documents that guide the upcoming cycle, namely:

- **The Annual Sustainable Growth Survey regarding Economic and Fiscal Policies**
- **The Joint Employing Report Socio-economic coordination and (from 2023) social upward convergence,**
- **The Alert Mechanism Report regarding Macro Economic Imbalances**

The Semester's role in directing the implementation of the Recovery and Resilience Plans

The 'Recovery and Resilience Facility' (RRF) is a financial tool introduced by the EU in 2021. Its purpose is to provide financial support to Member States for implementing reforms and investments aimed at mitigating the economic and social repercussions of the COVID-19 pandemic. Additionally, the RRF aims to facilitate the transitions towards greener and more digital economies. Member States have the option to access grants or loans from the RRF to execute projects outlined in their National Recovery and Resilience Plans (NRRP), addressing economic, social, and environmental challenges. The RRF has a total budget of €723.8 billion for the period 2021-2026. This financial tool supports the reforms and investments outlined in national recovery and resilience plans, which are collaboratively agreed upon by Member States and the European Union.

The 2023 Semester overview reveals a significant gap in the required paradigm shift

While Recovery and Resilience Plans outline the primary investment priorities for the 2021-2026 period, the annual Semester serves as a complement by pointing out the challenges that are insufficiently addressed. The present briefing does not seek to present a comprehensive analysis of the numerous Semester documents. However, Eurocarers' rapid review of the 2023 cycle enables us to assess the extent to which Long-Term Care (LTC) is genuinely prioritised within national reform and investment policies, aligning with the objectives of the Care Strategy.

Once again, this year, the situation is inconsistent. While care is on the agenda, it does not receive the necessary level of priority in all countries, the comprehensive approach advocated by the Care Strategy is not consistently integrated, and, informal carers alarmingly remain invisible.

Long-term care is a consideration in nearly all Member States, with most referencing improvements in at least one dimension of LTC, such as sustainability, adequacy, quality, affordability, or access. Notably, LTC is explicitly omitted in only two countries - Hungary and Lithuania.

Belgium and Austria have both received specific recommendations to improve their LTC systems. However, to achieve a more organised

approach and a significant boost in LTC services investment, it is essential to implement a more systematic prioritisation via country-specific recommendations. This becomes especially critical given the multiplicity of competing priorities and the constrained capacity of some countries to absorb European funds.

The predominant approach to LTC continues to revolve around fiscal stability and cost containment. This is evident in the case of Belgium, where "strengthened efforts are recommended to improve the efficiency of long-term care" considering that reforms undertaken "do not focus enough on addressing the fiscal sustainability challenge". Similarly, in Ireland, home-based care is primarily viewed as a cost-effective solution for ensuring sustainability, prioritising fiscal considerations over individuals' rights, needs, and preferences. Unfortunately, the potential of care as a catalyst for job creation and innovation often goes unnoticed.

While the Semester addresses several challenges in LTC, the all-encompassing approach advocated by the Care Strategy is not fully mainstreamed into the cycle. There is a noticeable lack of consistency in the terminology used across processes, hindering mutual understanding. Conversely, adopting a shared conceptual framework would enable the

comparison, contrast, and monitoring of progress, crucial for effective stakeholder engagement.

On a positive note, the Semester acknowledges ongoing issues related to staff shortages in the health and LTC sectors, particularly in Bulgaria, Cyprus, Finland, Greece Latvia, and Poland. Additionally, there is a notable emphasis on the urgent need to enhance skills in these sectors.

Regrettably, the terms ‘informal carer’ or ‘family carer’ are explicitly mentioned in only 8 countries (Croatia, Estonia, Greece, Malta, The Netherlands, Poland, Romania, and Slovenia). This indicates that, despite recent policy advancements recognising the pivotal role of informal carers, their situation is still not clearly articulated in policymaking terms.

In recent years, there has been an increasing recognition of the significance of policies aiming to achieve a better balance between work and personal life. This is especially crucial in supporting informal carers to access and remain in employment, thereby reducing the risk of poverty and social exclusion they may experience. The Work-Life Balance Directive for parents and carers has provided clear guidance in this area (Eurocarers, 2019). Unfortunately, the Semester does not widely incorporate this ambition, as Work-Life Balance for informal carers is only mentioned in a few countries (Cyprus, Finland, Ireland, Italy and The Netherlands).

While the Semester emphasises the European Union’s goal of gender equality, it still overlooks the impact of informal caregiving as a driver of gender inequalities. The majority of informal long-term care is provided by women, putting them at a higher risk of facing negative health and socio-economic outcomes. However, this crucial role of women as informal carers is acknowledged in only a handful of countries, (Bulgaria, Croatia, Cyprus, Hungary, Italy and the Netherlands). The Country Report for Croatia, in particular, rightly underlines the link between underfunded LTC services, the share of women excluded from the labour market due to care responsibilities, and the prevalence of poverty.

In the prevailing trend, health receives considerable attention throughout the process, with a focus on the sustainability, resilience and digitalisation of the system. However, despite the Care Strategy advocating for a “strategic and integrated approach to care,” there persists a siloed approach in the Semester concerning health and long-term care policies. The term ‘integrated care’ is specifically highlighted in only a few countries (Belgium, Denmark, Estonia, Hungary, Latvia, Lithuania, Portugal and Romania). Greece stands out as an exception, acknowledging the national implementation of the Care Strategy. The Semester should articulate this direction more explicitly, encouraging Member States to leverage the flagship initiative “Towards person-centred integrated care” available within the Technical Support Instrument.

Some stakeholders nevertheless advocate for the Semester to adopt an Economy of Wellbeing approach, as defined by the European Council in 2019. This approach aims to place people, the planet and their wellbeing at the centre of policy and decision-making, both now and in the future, underscoring the interconnected nature of wellbeing and economic growth (EuroHealthNet, 2023).

Utilising the Semester: a guide for carers' organisations



Carers' organisations can harness the EU policy landscape

As it stands, the Semester falls short and fails to meet the expectations of the European carers' movement. This demonstrates the challenges of prioritising a comprehensive approach to care and caring (including informal care) in policy debates. Still, the Semester process provides a distinct added value by placing long-term care on policy agendas, creating multiple entry points for carers' organisations to promote their message. The alignment of the European Care Strategy's ambitious and comprehensive approach to care with the Semester's connection of long-term care to economic and social development presents a unique opportunity to invigorate advocacy efforts.

For organisations seeking to capitalise on this alignment, Eurocarers disseminated a series of recommendations last year which remain entirely valid (Eurocarers, 2023). Our network aims to facilitate a consistent exchange of information and experiences on effectively utilising EU instruments to secure tangible measures for informal carers and investments in care services, including support for informal carers. The objective is to inspire national and local carers' organisations and provide them with practical, positive examples from other countries. The 'Support Centre for Informal Carers' (Steunpunt Mantelzorg) kindly shared about the positive development in their region.

A Successful Model in Flanders, Belgium: Collaboration with Carers' Organisations in Implementing an Ambitious Informal Care Policy Supported by the EU Recovery and Resilience Fund

In the Flanders Region of Belgium, EU funding supports the implementation of the newly adopted Informal Care Policy, covering areas such as the participation and empowerment of informal carers, balancing care and work, young carers, rights and administration, and community-based care.

In line with the European Commission's Country Specific Recommendations addressed to Belgium, the Flemish policy aims to align long-term care services with people's preferences, supporting community-based care and informal carers. A budget of 1 million euros from the EU Recovery and Resilience Fund is devoted to the implementation of this strategy. Flemish informal carers' organisations, along with a wide variety of stakeholders play a central role in the implementation of this strategy, having received a substantial budget from the Recovery and Resilience Fund to carry out key actions for informal carers.

Starting in June 2023, a series of programmes are designed to support informal carers in various ways. Two organisations, Samana and Steunpunt Mantelzorg, focus on Young Carers through awareness-raising and support actions, benefiting from a budget of 280 000 euros.

The Flemish Mantelzorg Platform, consisting of six organisations recognised by regional authorities, is delivering four action programmes addressing key challenges for informal carers: Work-Life Balance, Well-being, Managing the key steps of the informal care journey, and accessing carer's rights, using a budget of 800.000 euros.

The action programmes as well as the communication strategy are coordinated by the Flemish Expertise Centre for Informal Care, which is part of the Flemish Institute for Primary Care. These comprehensive action programmes are designed and practically implemented in collaboration with a wide range of stakeholders, including schools, trade unions, employer organisations and organisations of care professionals. While questions remain about the feasibility of achieving the highly ambitious goals assigned to the programmes within the deadline of the end of 2024, and the long-term sustainability of the outcomes, actors generally view the combination of the policy framework and EU funding as a welcome and relevant opportunity to improve the daily life of informal carers.

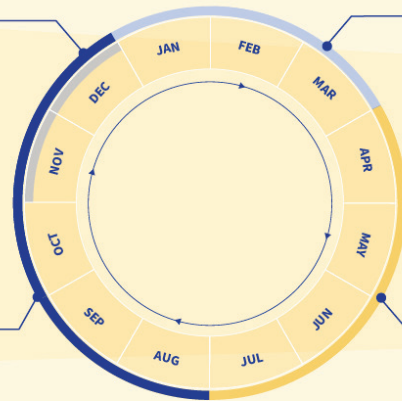
For more information please consult:
Mantelzorgers Vlaams
Mantelzorgplan 2022-2024

Figure 1

European Semester

Timeline

Preparatory phase
Analysis of the situation
 and follow-up on the previous year



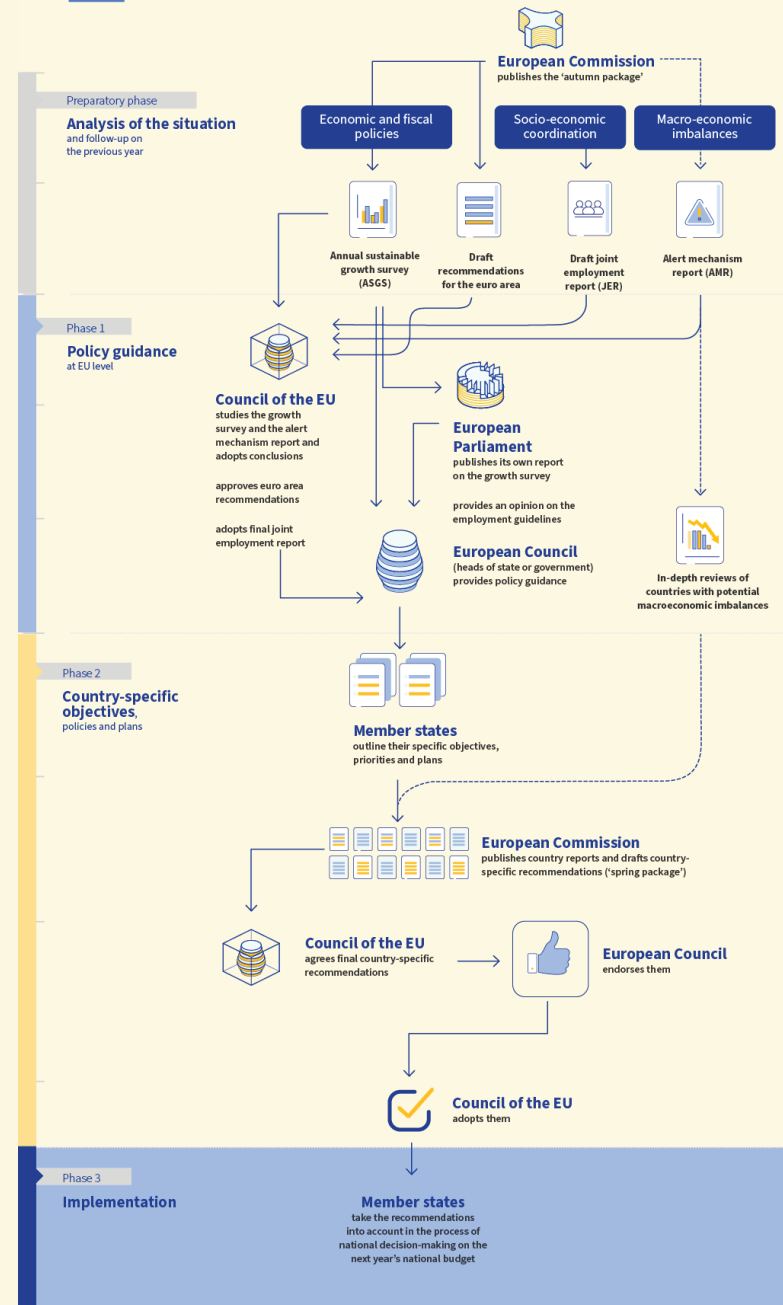
Phase 1
Policy guidance
 at EU level

Phase 3
Implementation
 A new cycle starts towards the end of the year, when the Commission provides an overview of the economic situation for the coming year.

Phase 2
Country-specific objectives,
 policies and plans

Source: European Commission, Eurostat @European Commission, 2023

Who does what?



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