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EMIN Seminar Report

PARIS, 9 DECEMBER 2013

What is the EMIN Project? Bringing together various experts, professionals, academics and diverse entities active in the fight against poverty and social exclusion, the EUROPEAN MINIMUM INCOME NETWORK aims at building consensus towards the progressive realisation of adequate and accessible minimum income schemes in EU Member States. The EMIN is a two-year project (2013-2014) funded by the European Commission, in line with the European Commission's Active Inclusion Recommendation of 2008, the Europe 2020 Strategy and in the context of the European Platform against Poverty and Social Exclusion.

You can also **follow the work** of the EMIN **by clicking on 'follow'** once you are on the EMIN blog <http://emin-eu.net>

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The opinions expressed do not represent the European Commission's official position.

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The **objective of the seminar** was to present and create debate in relation to the first outcomes from the European Minimum Income Network Project, and to build support for making progress on the accessibility of adequate Minimum Income Schemes in Europe

Opening Plenary

The chair of the meeting, **Julien Van Geertsom**, Chairman of the management committee of the Belgian FPP Social Integration and member of the EMIN project management committee, opened the meeting by recalling the words of Nelson Mandela, whose recent death had been announced: “poverty is not natural, it is man-made; this means it can be un-made. Hence the motto “poverty is man-made”.

François Soulage, President of Secours Catholique (Member of EAPN France) welcomed the participants. Secours Catholique is the French member of Caritas international, which exists in 170 countries. Every November a report on poverty is published by the French observatory on poverty. The main issues reported in 2013 are:

- Youth poverty: under 25 year-olds have no access to a minimum income, and are very much affected by the crisis, since many have no resources, and even if available, employment is on a short term contract basis. We must help them get out of their distress: they are not only poor, but they are losing friends and their connections with society.
- Couples with children over five years old with only a minimum income which does not take into account the increases of up to 4% in the costs of health, heating etc. have 5% less purchasing power.

It is not only about income, but rather about what people need to live a decent life in addition to the minimum income. People are living on half the poverty level; they need to be able to meet, to talk and above all to access their rights. Concerning the RSA, the Revenue de Solidarité Active, half the people hosted by Secours Catholique have not requested the minimum income; two thirds do not have access. How can we work on access to rights? We need to think of the procedures and obstacles for accessing what already exists, and to support those who have a right to it: create their ‘capacity’, taking into account the reality of people and their need for dignity.

Presentation of the EMIN Project

Fintan Farrell, EMIN Project Coordinator

Key developments in the EU context regarding minimum income are:

- **The Active Inclusion Recommendation, 2008**, on adequate income support (following up on the 1992 Council Recommendation), inclusive labour markets and access to quality services
- **2010 EU Year Against Poverty and Social Exclusion:** Poverty Target 20 million reduction by 2020

- **The Social Investment Package 2013**, which puts forward proposals to enhance social cohesion and restore economic growth by investing in human capital, mobilising a larger share of Europe's potential, whilst ensuring the social inclusion of the less advantaged and an adequate level of social protection.
- **The Europe 2020 Strategy**: Inclusive Growth, Social Objective, Poverty reduction target, Partnership Principle: Platform against Poverty, National Reform Programmes and Country specific recommendations.
- **The Annual Growth Survey**
- **The crisis**: Austerity – Fiscal consolidation
- **Structural Funds (2014-2020)**: source of financing to help Member States invest in integrated active inclusion strategies, higher percentage for ESF and 20% ear-marked for social inclusion
- **The Employment and Social Innovation (EASI) Programme**

The EU is providing support for the **European Minimum Income Network (EMIN)**, plus the Commission will support a **project to develop European common principles and methodology to set reference budgets**. Reference budgets are for different types of households to live on a designated level of well-being. Given the household composition, the disposable income and some other characteristics (like housing situation, transportation), a budget is given that suits the situation of the individual household. Continued support is also being provided for the **European Meetings of People Experiencing Poverty and Social Exclusion** (supporting national participation processes).

The aim of the European Minimum Income Network is to build consensus to take the necessary steps towards the progressive realisation of adequate and accessible minimum income schemes, and to explore what are the issues leading to a high level of non-take-up in many countries. It is a two year project (2013 – 2014) funded by the European Commission. Work on the project is integrated into the work of relevant structures at national level so as to ensure that work on the topic can continue after the project is ended.

The importance of minimum income schemes was recalled: in cash based societies, Minimum Income schemes provide a life line for people experiencing poverty and social exclusion to enable them to remain active in society, reconnect to the world of work and live a life in dignity. It is an important basis for an inclusive recovery from the crisis and for building more equal societies. It is essentially a question of the society that we want to build.

Partners in the project: The Lead Partner is EAPN (European Anti-Poverty Network). Other key partners are AGE Platform Europe, FEANTSA (European Federation of National Organisations Working with the Homeless), the Belgian Public Administration, Public Planning Service Social Integration, Anti-Poverty Policy and Social Economy Social

Integration, ANSA (Agence Nouvelle des Solidarités Actives), the ETUI (European Trade Union Institute), the OSE (Observatoire Social Européen) and SIRG (the Social Inclusion Regional Group), national Minimum Income Networks formed in Belgium by the Belgian Anti-Poverty Network, in Italy by CILAP/EAPN Italy, in Ireland by EAPN Ireland, in Denmark by EAPN Denmark, and in Hungary by EAPN Hungary. During 2014, the project will extend to a total of 31 countries, as well as the two thematic networks dealing with age, AGE Platform Europe and access for homeless people, FEANTSA.

Within EMIN the **steps in the path towards adequate and accessible Minimum Income Schemes** are to analyse current trends and obstacles, present and exchange on 'good' and 'unsatisfactory' practices, raise awareness on the EU current frameworks, including the 1992 Council Recommendation and the 2008 Active Inclusion Recommendation, the Social Investment Package, build consensus on the necessary steps towards the progressive realisation of adequate and accessible Minimum Income Schemes, and contribute to the identification of common EU level definitions and criteria for adequate Minimum Income Schemes.

Activities planned in the project are: the establishment and Launch of the European Minimum Income Network, and of Five National Minimum Income Networks in Denmark, Ireland, Belgium, Italy and Hungary, the analysis of Minimum Income Schemes in the 5 identified Countries (covering adequacy, coverage, take-up and the use of structural funds to support minimum income schemes), thematic work on adequacy of minimum old age income Schemes, led by AGE Platform in France, Ireland and Poland, and thematic work on take up by vulnerable groups, in particular homeless people, led by FEANTSA, in Italy, France, Hungary, Romania, Ireland, United Kingdom, Finland and Poland. The analysis of Minimum Income Schemes in a further 26 countries is also planned as part of the project.

Two Peer Review sessions have been planned (the first one took place in October 2013). A European level Conference (the Paris conference reported here), thirty-one national level Conferences and finally a second EU level Conference (at the end of 2014) to present the outcomes of the project and suggestions for enhancing EU level coordination in the field of Minimum Income Schemes.

Two **Advisory Groups** are foreseen under the project: a broad EU Stakeholder Advisory Committee and an advisory Group with the European Parliament, who sponsored this project.

The 2013 **EU meeting of people experiencing** poverty included an exchange on the costs of a basket of goods and services needed for a life in dignity and how this compares with the reality of what is available from Minimum Income Schemes (where such schemes exist) or from Minimum Wages. Examples of the impact of the 'crisis on people's daily lives', and 'interesting practices' in different countries that contribute to the fight against poverty were

also exchanged. The report of the meeting is available at www.eapn.eu and includes: 1) A General Report: with key messages, the main inputs, 2) A background papers on Reference Budgets, the impact of crisis, practice examples, and 3) Slogans from the meeting: for example the slogan from the French delegation was a quote from Coluche (a well-known comedian): “Quand j’étais petit à la maison, le plus dur c’était la fin du mois, surtout les 30 derniers jours”, i.e. “When I was little, at home, the hardest was the end of the month, especially the 30 last days.” The slogan from the German Delegation was ‘Never Give Up’.

Even in times of crises we must make choices about the society that we want.

Developments in relation to Minimum Income Schemes

The French Model

Jean-Pierre Bultez, expert on the ONPES, representative of les Petits Frères des Pauvres (member of EAPN France) and Vice President of AGE Platform Europe¹

The French system is complex, and 60 years old. It covers three main areas: for people able to work (i.e. the RSA) for 1.6 million people, the ASS (specific solidarity) under certain conditions linked to previous activity and resources, for workers deprived of employment who have exhausted their rights to unemployment benefit), and for people far from the labour market. There is also an allowance for people with disability, the AAH. Other allowances are the Allocation Equivalente Retraite, an allowance for the retired, the AER-ER, the ASI, for a person with invalidity, the ASPA for elderly people who have made no, or too few, contributions to their pension, or who are unable to work, the ATA, for those waiting for regularisation for example, the AV, widow’s allowance, and the RSO for the French overseas territories.

10% of the population is affected by minimum income; the payments represent 1% of the Gross Domestic Product, and 3.5% of the national budget, affecting a large number of people, but not so big in relation to the overall budget.

The objectives of the scheme are social cohesion, national solidarity and the fight against poverty (though this is not clearly stated).

Many questions arise about the system: should it be for nationals or non-nationals, universal or for residents? What about its accessibility: readability, simplification of forms etc.? Should it be for individuals or for entire families? What are the reasons for non-take-up (especially the RSA)? What about the level of allowances, which are not linked to actual costs; what indexations? Management: should this be administered on a regional or

¹ Please find the full text of Jean-Pierre Bultez’ input in French in appendix to this report

national basis? Linked to integration and/or activation?

There are nine different allowances, but they are not always accessible. Do they help people get out of poverty? Is it just a response to an inadequate system? What should be the level of allowances?

How best to develop an adequate minimum income system? Recognise the voice of citizens: they must have their say; is the 60% level acceptable, and what is its value? What are the real needs, individual and collective, what about a social life? What do citizens need to live decently and in dignity?

To address these questions the French Observatory worked on reference budgets bringing together different categories of people in different geographical locations and using a very specific methodology to develop such reference budgets. The citizens involved responded on the basis of the social structures of today, supported by external experts. The impact of this work is wide, as it touches on comparison, validation, the link between income and access to services, pedagogy, public policy, and the role of the European Commission, which could have an important role in monitoring a minimum income policy.

Provisional Outcomes of the EMIN Project:

Anne Van Lancker, EMIN Policy Coordinator

The purpose of the EMIN project in phase 1 was the analysis of current state of play in five pilot countries, by outlining current reality in relation to minimum income schemes in terms of adequacy, coverage and take-up, identifying obstacles to implementation of adequate and accessible minimum income schemes, and progressing work on identifying possible steps to improve adequacy and accessibility of minimum income schemes with key stakeholders (social and other NGOs, public authorities, trade unions, employers, academia, people experiencing poverty). The state of play of the project today: five national minimum income networks constituted and five national reports prepared following first consultations with stakeholders. This input draws on the synthesis report of the 5 country reports and presents first draft recommendations for progress towards the progressive realisation of adequate minimum income schemes and the support role that could be played at EU level.

National reports on adequacy, coverage and take-up of minimum income schemes

Minimum income schemes are “income support schemes which provide a safety net for those who cannot work or access a decent job and are not eligible for social security payments or whose entitlements have expired”. Adequate minimum income is income that is indispensable to live a life in dignity and to fully participate in society. All pilot countries except Italy have some sort of minimum income schemes at national level, in line with definition of EMIN project. Minimum income schemes are very different in the pilot

countries: the schemes in Belgium and Denmark are comprehensive and simple, open to all people with insufficient means, but only in Denmark is it close to the AROP (at risk of poverty level) except for young people; the scheme in Hungary is relatively simple but has very restricted eligibility and coverage; Italy has no national minimum income scheme but only regional minimum income schemes, restricted to specific groups, and insufficient; Ireland has a complex system of categorical schemes plus a general scheme of last resort. Most minimum income schemes have eligibility conditions related to residence, age, lack of resources, willingness to work. Benefits vary according to household composition; uprating is often not on a regular basis; there is means-testing, and there are no time limits, except in Italy.

Recommendations from the analysis of five countries:

Adequacy overview: all five countries favour launching a public debate on definition of adequate minimum income. Belgium and Denmark recommend a commitment to raise all benefits above the 60% threshold. Italy recommends the introduction of a National Minimum Income Scheme. Belgium, Denmark recommend the use of reference budgets. Belgium, Denmark and Hungary recommend establishing proper uprating mechanisms to reflect standards of living. Ireland recommends simplifying the complex systems, and better monitoring and evaluation.

Coverage and take-up: overview: in Belgium, abolish conditionality on readiness to accept job offers; in Hungary, abolish conditionality on behaviour. In Ireland, create a centralized unit for means testing. In Belgium automatic granting of benefits. In Belgium and Denmark improve access for homeless people. In Belgium: research on non-take-up.

Link with active inclusion strategies: Belgium, Denmark, Hungary and Ireland are in favour of developing an integrated approach. Belgium and Denmark seek to create more jobs for the socially excluded. For Belgium, Denmark, Hungary and Ireland: Service delivery in personalized way. In Denmark a bigger role for social NGOs and social economy is recommended. In Belgium and Ireland: guarantee access to social services, and control prices of essential services. In Hungary, replace workfare by activation measures, and in Belgium: engage poverty experts in public services, and use ex-ante poverty assessments.

The use of ESF in fight against poverty and social exclusion: The ESF does not play a substantial role yet in the fight against poverty and social exclusion in pilot countries. In Denmark, less than 10 out of 214 projects concern social inclusion, and there are plans for the next period to make better use of ESF for social inclusion. In Ireland, the ESF is only used for labour market initiatives and to a lesser extend for community development and services. Hungary has ESF funded schemes that include personalized services, increased labour market integration. Italy plans to develop a national plan to set up measures aimed at families with children, to give them financial support conditional on participation in project managed by network of service providers. Additional interventions for people far

from labour market need a broad range of measures, for example social farms in rural areas. The Cohesion plan for South of Italy includes 36% for social inclusion.

First recommendations:

Adequacy of Minimum Income

- Launch a public debate on what is considered as an adequate minimum income: “income support schemes which provide a safety net for those who cannot work or access a decent job and are not eligible for social security payments or whose entitlements have expired”
- Aim for Adequate Incomes: income that is indispensable to live a life in dignity and to fully participate in society
- Create a panel of experts, including SPC members, NGOs, people experiencing poverty, to discuss common principles and definitions of what constitutes an adequate Minimum Income.
- Give guidance for debate on adequacy of minimum income, using 60% of median income as an important national reference, and the use of reference budgets to test the robustness of the level of minimum income and of the 60% threshold.
- Develop a common EU-wide framework and methodology for reference budgets to assess adequacy of minimum income schemes, based on active participation of people experiencing poverty in the establishment of the basket of goods and services
- The result of these efforts should be reflected in an EU framework directive on adequate minimum income
- The European Commission should commission a research on the cost of not investing in adequate minimum income and social protection

Coverage and take-up of Minimum Income Schemes:

- Member States should evaluate their minimum income schemes in order to avoid the creation of hidden poverty, to address the reasons for non-take-up of the right to minimum income, and to identify measures to increase transparency, inform eligible benefit recipients actively about their rights, establish simplified procedures and put in place policies to fight stigma and discrimination.
- The European Commission should commission research on non-take-up in Member States. The Open Method of Coordination could be used to exchange best practices on take-up.

Linking the three pillars of the Active Inclusion strategy:

Member States should commit to develop a comprehensive national strategy for active inclusion, based on three connected strands on an equal basis: adequate income support, inclusive labour markets and access to quality services. These strategies should be essential components of the National Reform Programmes under the Europe 2020 strategy, using the active inclusion strategy as ex-ante conditionality.

The role of European Structural Funds in the fight against poverty and social exclusion:

Explicit reference to social inclusion and a 20% share of the ESF budget to be used exclusively for social inclusion can have beneficial effects on countries' priorities. Member States should prioritize delivery on the commitment of allocating 20% of ESF for social inclusion in their Operational Programmes, support the coordinated use of ESF and ERDF and monitor effectiveness. Member States should report on the use of structural funds to achieve the poverty target of the Europe 2020 strategy in their national reform programmes. The European Commission should support countries by documenting good practices. The partnership principle should be enforced to ensure access to funds by NGOs and other relevant partners.

The poverty target in Europe 2020 (at least 20 million less people experiencing poverty):

The poverty target is far off track. In many countries, austerity measures are undermining social policies. There is a lack of political will to address poverty. The Social Investment Package states that well-designed welfare systems combining a strong social investment dimension with protection and stabilization are answers to the crisis. The main instruments under the European Semester have to be rebalanced to address poverty: the Annual Growth Survey should be accompanied by an Annual Progress Report with the state of play on Europe 2020 targets, including poverty reduction. National Reform Programmes should become the main instrument for progress on the poverty target, and social reports should be made obligatory. It is vital to address the importance of social policies and comprehensive anti-poverty strategy, including adequate minimum income in Country Specific Recommendations. Ensure democratic legitimacy of European Semester and Europe 2020 strategy by fully involving parliaments, social partners and civil society, including people experiencing poverty. The European Commission should use the horizontal social clause to assess austerity measures and reforms.

Establish well-defined EU level social standards:

Use the **social scoreboard** as a basis for developing tangible indications for Member States on how to fight or prevent poverty and social exclusion and feed in the Country Specific Recommendations 2014. Develop a system of well-defined and binding EU level social standards, as part of a Social Pact for Europe. Use the ILO recommendation on national social protection floors, including access to essential goods and services, such as health, education, food and social services, and income support, as reference for these social standards. The right to a decent minimum income could be a pioneer **of such social standards**.

Perspectives from key Institutions and Organisations

European Commission

Emma Toledano Laredo, Head of Unit Social Inclusion and Poverty Reduction,

The Commission is satisfied with how the EMIN project is evolving and the results that were achieved so far. Raising awareness on the need to have adequate income support is essential, especially in a context of budget constraints. The budgetary constraints and the demographic challenge ahead of us will imply reforms of the social protection systems to use available resources in a more efficient and effective way through simplifying the systems and better targeting. Today we are drifting away from the poverty target with an increase of 7 million people being at risk of poverty and social exclusion.

The EMIN pilot project, as well as the one on developing a common methodology on reference budgets, are very important as they put the issue of adequate income support on the EU agenda. Already in 1992, the European Council recommended the Member States to recognize the basic right of a person to sufficient resources and social assistance. The active inclusion strategy, adopted in 2008, set the focus on an integrated approach of three social policy pillars: adequate income support, active and inclusive labour markets and the provision of quality social services. In 2010, in the communication on the European Platform against poverty and social exclusion, the European Commission committed to evaluate the implementation of the active inclusion strategy, including the first pillar regarding adequate income support.

The Social Investment Package, adopted at the beginning of this year, represents the Commission's response to the social emergency arising from the current crisis, while also delivering on some of the key commitments announced in the context of the Europe 2020 Strategy. The Active inclusion Staff Working Document assesses the implementation of active inclusion strategy at national level and highlights specific challenges related to the three areas in the aftermath of the 2008 recommendation. The challenges identified for different pillars are: for the first pillar: adequacy, non-take-up, and coverage for the adequate income support; for the second pillar: in-work poverty and disincentives for the inclusive labour markets, and for the third pillar: the need to focus on the redistributive role of services. The Staff Working Document also emphasizes the importance of integrated approaches in the delivery of active inclusion strategy and the need to involve relevant stakeholders in the design, implementation, and monitoring of active inclusion.

Through the EMIN project the focus is mainly set on issues related to the first pillar of the active inclusion strategy (adequate income support), but, as it was recalled, the integrated approach requires links between the different pillars. The integrated approach emphasises the need to ensure access to quality social services. The streamlining of social benefits should also be a priority, since a fragmented approach does not ensure equal access and appropriate coverage.

Therefore the Commission calls upon Member States in the Social Investment Package to set more efficient and effective social protection systems, including through the one-stop-shop approach, for instance the “Work shops” (werkwinkels) that are developed in Flanders (Belgium) where there is a combination of job search services with social welfare services accessible in the same location. This approach improves the accessibility and encourages the different levels of government to cooperate in order to avoid overlaps and gaps in the coverage. Therefore, in the opinion of the Commission, the integrated approach of the three pillars should be part of the recommendations put forward by the project.

From the presentation of the synthesis report, we can see that all country teams recommend launching a public debate on defining an adequate minimum income scheme. This is a crucial element as it is necessary to raise awareness of the role of the minimum income schemes in combating poverty and social exclusion. The Social Investment Package communication recalls that the level of the minimum income should be high enough for a decent life and at the same time help people to be motivated and activated to work.

Regarding the initial recommendations at EU level, 3 country reports (Denmark, Belgium and Ireland) suggest using reference budgets as a tool to define a decent level of living. The Commission will soon launch a project on setting up a common methodology on reference budgets. Reference budgets are a valuable tool for the policy makers to set the priorities, especially in times of budgetary constraints. They also show the link with the provision of adequate social services and the redistributive role of these services.

There is already some resistance from some Member States to this approach similar to the difficulties to convince some Member States in Council to adopt the Social Investment conclusions last June. This resistance is mainly due to two reasons: a financial reason as Member States might fear that the budgets set through the reference budget methodology will be too generous; and a political reason, as Member States believe the EU should not interfere in methodologies already established at national level.

It is the role of the Commission to convince Member States that reference budgets are important to evaluate the adequacy of minimum income schemes and to continue successful EU integration (*this is consistent with the conclusions of the workshop on reference budgets at the Annual convention 2013*). The networks set up through the EMIN project will certainly be very valuable to ensure support and implementation of the reference budgets at national level.

The use of the European Social Fund is also highlighted in the report. The new ESF regulation and the 20% earmarked for social inclusion policies should enable to put more focus on social inclusion policies in the next programming period. A stronger monitoring of the integrated active inclusion strategies, enforcing the ex-ante conditionalities could lead to significant progress. The Social Fund cannot be used for the payment of the minimum income benefits, but it could be used to build administrative capacity, set up activation measures in different forms and set up integrated strategies to ensure better access to adequate minimum income schemes and greater social inclusion.

For example, the Netherlands and Austria have used the ESF to set up comprehensive and integrated active inclusion strategies. In Austria, Step 2 Job was a pilot project that was funded from September 2009 to March 2011. A Counselling and Consultation Centre for people who receive social welfare and are furthest from the labour market was set up. Step 2 Job combines individual coaching, psycho-social support, empowerment, counselling, professional training, as well as support and advice on issues like debt, housing, health issues and second chance to education. Participants of the project reported that they received support for the first time in their lives.

In the Netherlands, the project Fit 4 Work focuses on the development of an effective approach designed to improve the employment prospects of individuals who experience a psychological disorder and who, historically, have been 'distanced' from the labour market. It gathers the 4 big cities in the Netherlands (Amsterdam, Rotterdam, The Hague and Utrecht), the Dutch Public Employment Service and the Municipal Health Agencies. It offers adequate services in a coordinated way by adopting an approach based on the client's problems and perspective.

It is essential for the Member States to ensure that they fully use all the potential of the ESF. Finally, the Commission is assessing the minimum income schemes in the Member States through the European Semester and the country specific recommendations. The Annual Growth Survey 2014 puts an emphasis on the role of social protection, not only on reducing poverty, but also on reducing the growing inequalities. It fully recognises the need for an efficient and adequate income support as one of the pillars of the active inclusion strategies. More attention is put on inequalities in societies as income inequality is growing across and within Member States, particularly in the South and periphery of the EU (*Joint Employment report 2014 accompanying the Annual Growth Survey for 2014*).

An analysis of the income quintile ratio S80/S20 between 2005 and 2011, shows that income became markedly less equally distributed in 9 Member States (Bulgaria, Cyprus, Germany, Denmark, Greece, Spain, France, Croatia and Romania). The largest relative rise occurred in Denmark and Spain, both with relative rises of about 30%. In the 2013 Semester, the Commission has proposed several recommendations related to the alleviation of poverty by improving the effectiveness and efficiency of social transfers and better targeting the benefits (e.g. Bulgaria, Italy, Lithuania and Romania). For Italy, the CSR was issued based on analysis made by the Commission which showed that the Italian social protection systems do not seem to be able to cope with increasing social needs. Social transfers (excluding pensions which represent a very large part of it, one of the highest in the EU) have a very low impact on poverty reduction, the third lowest in the EU, and the distribution of family benefits is unfavourable to low-income households. The Commission is also assisting "programme countries" such as Greece and Cyprus to develop adequate minimum income schemes within their budgetary margins. The Commission will continue its efforts in this process to ensure that efficient and effective social protection systems are set up and maintained.

The Commission looks forward to the EU recommendations that will come out of the project and how the networks will develop in all the Member States, as they represent an important leverage from the different types of stakeholders to build awareness and ensure the implementation of the SIP priorities regarding adequate minimum income schemes. The Commission will also continue to provide more analysis on coverage, non-take-up and one-stop shops.

French Ministry

Vincent Billerey, Chef du bureau des minima sociaux, Ministère des affaires sociales et de la santé, France

Presenting the French ministry office dealing with minimum income systems, Mr Billerey agreed with what had been said earlier, i.e. the number of systems and objectives, sometimes with incoherence's (for example between the RSA, the Revenu de Solidarités Actives, which is conditional on seeking work and the RSO, Revenu de Solidarité Outre Mer, for French overseas territories, which is conditional on not seeking work, and the lack of a common legal basis: the social minima are affected by the field of public policy, with very different operational rules (concerning revalorization, resources, reference periods); avoid forgetting social provisions (other than the social minima) : housing allowances, universal health cover) etc.

The RSA was created in 2008, based on the former RSI (revenu minimum d'insertion) and is aimed at people working with low wages to provide them with a complement. Half of minimum income recipients, and 2/3 of people on income support are covered by social minima, with €10million in expenditure, and strong media focus. The double specificity of the RSA is that it is non categorical, with a positive link with social integration. It is the only scheme with duties and rights. There is a high level of non-take-up: 49% overall, and 68% for the RSA activity. There is a will to simplify the system: proposals have been made in a recent report by Deputy Sirugue of the French national parliament. Two objectives have not been achieved: reducing poverty, and the return to employment. The Sirugue report suggests an 'activity bonus' ('prime d'activité'), based on the individual, and that it should be more automatic; however "to be simple is complicated!"

In the ongoing work to improve the system there are two main changes: fighting against fraud is less important than the fight against non-take-up; financial incentives are not the only tool for active inclusion. Fighting non-take-up is in two areas: a multi annual plan against poverty and for social inclusion, January 2013, and the report by Chérèque, linked to the report on poverty.

Another area due for improvement is to fill the gaps, with the 'garantie jeunes' (youth guarantee), with the support of the ESF and in line with the European recommendation for a youth guarantee; a further area is a revaluation of 10% for the RSA (after revalorising by 25% the AAH (disability allowance), and an exceptional revalorisation of the ASPA (allowance for the elderly) planned in 2014, and to increase coherence between allowances, by linking them technically.

European Economic and Social Committee

Béatrice Ouin (CFDT), member of the European Economic and Social Committee (EESC)

The Economic and Social Committee Opinion (SOC/482 European minimum income and poverty indicators, own-initiative opinion), by rapporteur Georgios Dassis (Gr. II-EL) and co rapporteur Seamus Boland (Gr. III-IE) was being debated on the day of the conference, and should be adopted the following day. Ms Ouin outlined the key content of the opinion.

The aim of the Opinion is to broaden the debate. It started from a study by the European Social Observatory comparing 26 minimum income systems across Europe, analysing the legislation and the potential to set up of a fund for social solidarity. Recommendations in the opinion are public, and will be published in the Official Journal. The rapporteur insists that since 1988, the poor are touched the most. The idea of solidarity across Europe is not visible. Now is the time to send a concrete message, for example to establish a European minimum income: a more proactive policy is needed, with better coordination, to achieve the objectives of 2020. Send a clear message to citizens that there should be a minimum income, and provide the means for better coordination.

The Opinion is available at <http://www.eesc.europa.eu/?i=portal.en.soc-opinions.26780>.

EAPN

Sian Jones, Policy Coordinator

EAPN is coordinating the EMIN project, so EAPN's overall approach is integrated, I will focus on some extra elements, and highlight some challenges. The context given by the Commission speaker is important and EAPN welcomes the new work on reference budgets as a follow up to the commitments on Active Inclusion in the Social Investment Pack.

EAPN in its work in 2010 on exploring the scope for an EU framework on minimum income has fought for both relative and absolute indicators to establish adequacy thresholds. The basket of goods approach is useful for reflecting access to basic goods and services, but this must be combined with a relative benchmark, setting this access within the context of the society in which people live, particularly when there is increasing inequality in Europe. EAPN in 2010 argued for an EU framework on Minimum Income, and whilst we recognize that the political context is negative for this, we believe that the legal base is there in the existing Treaties. We need to be more ambitious about what we think needs to be done, then discuss how. We need to have a long-term and a short-term view.

The Commission highlights the key role of implementation through Europe 2020 and the European Semester. However, The Annual Growth Survey this year is disappointing, and continues to focus on fiscal consolidation and efficiency in social protection budgets, although references are made to ensuring that safety nets do their jobs. The Commission's work on Reference budgets, however, is not mentioned, and in the priority section, no focus

is given to ensuring adequacy. A further concern is the increasing focus on targeting, using the excuse of austerity demands. Universal access is needed to guarantee a dignified life, for all, with a long term and short term vision. We should make more reference to new benchmarks – e.g. the ILO and UNO-backed social protection floor, which highlights global demands for a universal social protection floor, with a broader vision of minimum income: the right to minimum income is part of access to adequate income and needs to be supported by accessible services.

The draft EMIN proposals talk about a rights framework, plus progressivity. We need to make more reference to rights, the EU Treaty obligation and the Social Charter, and make a link to minimum wages, creating a positive hierarchy between minimum incomes with higher minimum wages, and to use opportunities around discussing what kind of EU we want: social standards need hard law. The discussion on closer economic union and the social dimension of the EMU, are opening up a space, with potential Treaty Changes, which could be used for furthering these demands.

Concerning an EU framework directive, EAPN obtained a legal opinion which supported the legal base for an EU minimum income framework directive under the current Treaties; see EAPN's working paper and the EESC Opinion. The EAPN proposal was to agree common definition, criteria and methodology for establishing adequacy, then monitoring and reporting, based on a relative benchmark of the 60% threshold and absolute indicators from reference budgets. The idea was not to have a fixed EU minimum income. We still believe this could be done. The next Treaty revisions can also open up new opportunities. The key question is how to ensure any EU framework or common approach supports adequacy. There are some worries about some countries approaches to reference budgets, which reduce the basket of goods to a minimum. A further question is how do we finance adequate minimum income as part of a comprehensive social protection system? We need to address the key role of progressive taxation...to finance adequate social protection systems and a possible EU framework should aim to guarantee this, and to reduce the disparities and imbalances, ensuring a level playing field and, for coherence between countries: an EU minimum income Directive could address this.

Adequacy is crucial: both a relative and absolute benchmark as highlighted above. But common objectives and values must be agreed about adequacy, to ensure adequate access to rights, goods and services, as referenced in the Social OMC Common Objectives (2010).

In the short term, more use can be made of the Europe 2020/Semester mechanisms i.e. EAPN members are actively engaged in trying to influence the NRPs and the Commission's proposals of country-specific recommendations (CSRs). CSRs should be automatically given to all countries which don't have a minimum income, then monitor the benefits for countries that do have it. We should be aiming to get CSRs where the levels are not adequate. National Reform Programmes should have reports on the negative effects of cuts on minimum income, plus show how the integrated approach works. Use the OMC.

Structural funds could be better used, including by involving NGOs for example in establishing more effective minimum income systems, supporting take-up as well as integrated active inclusion. On participation, take it to the political sphere, to ensure that adequacy of minimum income is a key focus in stakeholder involvement dialogues at the national and EU level, linked to the Semester involving people experiencing poverty in dialogue around rights, access and social services, and getting political support. The context of the elections is a key moment to build this support, and to highlight the realities and impact of a lack of an adequate minimum income can mean for individuals, and for Europe.

Plenary discussion

In the UK there is a punitive attitude: with austerity not tempering, the UK is going back to 1938, if we have no minimum income floor, where are we? Services have become a moving feast... the middle class have to pay, and the poor won't get the services. We are tired of using demography as a reason for inequality: the top 30% live longer, the bottom 50% don't. It is important to ask people living in poverty to identify real needs. *Katherine Duffy, UK*

It is the right time for Greece. Free education has gone, there are cuts, 1 million families don't have electricity, children are dying from fires in the home, and benefits are being cut. It is a paradox to talk about minimum income. In two constituencies minimum income is being introduced, but people are suspicious. It is impossible to talk about minimum income in a country where the minimum wage is less than €500 per month. Unless we talk about reference budgets, the result will be zero. We must say that minimum income is essential. *Maria Marinakou, Greece.*

Member states must contribute to the fulfilment of people, with a duty to help others, people who need them. They must use their riches to help people. *Jonathan Devillers, Belgium*

Alain Greuillet, France, spoke of his difficult experience of applying for the RSA, yet being given two different series of answers by different advisors; the model should be based on the Belgian model of access to rights. Minimum income should include accompanying social measures.

The European Commission is supporting this project and links need to be made to the reference budget project that is currently being put in place. Social governance moving up on the agenda. For example the Annual growth Review identifies inequality within and between countries as a key challenge. *Bérengrère Steppé, European Commission.*

In the Netherlands there has been a minimum income for 37 years; 12 years ago many people were forced into self-employment. The minimum wage did not work. The current minister wants to put in place minimum income for flex work. *Jo Bothmer, NL.*

In Bulgaria there has been austerity for 20 years, so they have to be careful. Regarding using the 60% figure, this only 'provides the bread'. According to Eurostat (2011) in 13 out of 27 member states deprivation was higher than 60%, in 2013 it was lower. Reference budgets are very important. 60% can give an orientation, but we must also refer to material deprivation. *Maria Jeliazkova, Bulgaria*

The recent tragedy in Latvia is a manifestation of attitudes toward human dignity, concerning not only one supermarket but a whole system. They have been fighting the crisis for 7 years: not so much about poverty. There has been a huge emigration to the UK, Ireland, Italy, Greece... there should be unified criteria for a dignified life. *Elīna Ālere-Fogele, Latvia*

We have paid the price of not following up the 92 recommendation; in the 2005 renewal of the social agenda it was not possible to include minimum income so from there on we spoke about active inclusion. What society do we want? It is a question of democracy. The failure of 20 years is one reason for the crisis. Striving towards minimum income is an important path towards a real society 'there is a different way forward'. We are aiming to build support across all the actors, which is why the EESC Opinion is so important. *Fintan Farrell, EMIN.*

Helder Ferreira, Portugal, recalled the discussion during the Convention regarding reference budgets. How do we define what goes into the basket... for example, buying a season ticket for a person on a very low income is impossible, so travel becomes more expensive than for a person who can afford a season ticket. It is important to build consensus. In Portugal the minimum wage is not the solution to poverty.

60% while an important agreed benchmark is not a good reference for all countries. We should value good reference budgets to show the reality of the 60% threshold. Reference budgets need to be linked to life: the basket should show what it means. Importance of stressing solidarity between countries, but also within countries. Regarding the link to minimum wages: when you touch minimum income, you have to touch on minimum wages. *Anne Van Lancker, EMIN.*

Poverty is especially increasing for the elderly, for migrants, for children in institutions i.e. those who cannot speak. In Malta it is a question of principle, not only money. We need to change minds in our countries. *Maria Adele Farrugia, Malta*

Sian Jones as part of her response to the questions added that, regarding the reduction of money spent on social protection systems, the amount matters, as well as the quality. Minimum income must be part of a broader universal social protection system. The promise of ring fenced funds from the ESF for social inclusion must be monitored and delivered. An example of how such funds could be used is the experts by experience in Belgium which were initially funded through the ESF. Make demands on the EU on their moral and ethical role: rights are in the treaties; call on the EU to be a moral 'touchstone'.

Sian also re-stated that the minimum wage is crucial. It is important to create an EU framework for both Minimum Incomes and Minimum Wages. We need social standards, and we need solidarity transfers. It is important to listen to the voice of people experiencing poverty.

Closing Plenary

Conclusions from the Seminar

Hugh Frazer Adjunct Professor, National University of Ireland, EMIN Management Team

There was a very rich and informed discussion during the day only some of which is possible to capture in the short time available for presenting conclusions. However, there were many areas of consensus and much agreement on the most urgent issues to stress. The following is a summary of some of the key points which emerged during the day.

Real Progress

Real progress has been made during the first year of the European Minimum Income Network (EMIN) with the establishment of national minimum income networks in five countries, the thematic work on take up by vulnerable groups and on minimum income in old age, the work that has been done on analysing current trends and obstacles and the initial steps to raise awareness and build consensus. The importance of minimum income schemes in providing a lifeline for those in poverty has been reinforced. The provisional outcomes from the work that were presented at the conference received broad support as well as some suggestions for fine tuning. There was general agreement that they provide a good basis for further discussion with the different stakeholders. The challenge now is to build on this in the remaining 26 countries and further develop the work in the existing 5 countries.

Context urgent

The current context of the severe impact of the economic crisis and austerity makes the work of the project even more urgent. Cuts in social protection budgets, tightening of eligibility conditions for minimum income schemes and cutbacks in key supporting services are all worsening the hardship that people are experiencing. Progress in tackling poverty is in reverse and the Europe 2020 poverty or social exclusion target is further away than ever. The gaps between the richer and poorer Member States is widening. However, even before the crisis there was a need to do much more to develop adequate and accessible minimum income schemes in all Member States so as to ensure that people can lead lives of dignity, yet nothing was done. Thus the crisis is not an excuse for inaction. It should be a spur to more action. We need to be more, not less ambitious and set out a real vision of what is needed. We must stop the decline in social protection systems and assert that the effectiveness of minimum income schemes is not just an issue of efficiency - the overall

amount that countries spend on social protection also matters. We must assert the right to universal access to minimum income schemes for those who need them. We need also to insist on greater solidarity both within and between countries and to develop a set of unified criteria for the development of minimum income schemes that applies to all countries.

Minimum income schemes are important for several reasons

Many speakers highlighted the reasons why minimum income schemes are important. They provide a lifeline allowing people to remain active in society. They provide a baseline which helps people to reconnect to work. They ensure that people can lead a life of dignity. They are essential to ensure that we will have an inclusive recovery. They have a key contribution to make in reducing growing inequalities within and between countries.

Weaknesses in existing systems

The work of the initial phase of the project documenting the state of play in the different countries shows that most countries' minimum income schemes (MIS) fall short, to a greater or lesser degree, of what is necessary to ensure a life of dignity. However, there is great variation in how MIS are organised in different countries and how well they work. In some countries they are unduly complicated and there are many inconsistencies in how people are treated.

Four key issues

Four key issues have emerged as crucial in developing effective minimum income schemes. These are: defining adequacy and regular uprating of payments, ensuring coverage, addressing non-take-up and integrating minimum income into an active inclusion approach. In relation to adequacy it was agreed that reference budgets can play a very key role in helping to test what is an adequate income and in setting a social inclusion threshold. However, it will be important that reference budgets are not used just to establish what is necessary for survival. They must be used to establish, what is an adequate minimum income to enable people to live in dignity and to participate in society. It will also be important to take into account how people consume. They should be developed in conjunction with people experiencing poverty as well as with other experts. These issues should be at the heart of the work that the Commission is commissioning to develop a common methodology for using reference budgets. Some caution is needed in using the 60% median at-risk-of poverty threshold as a basis for setting an adequate minimum income. While it is an important benchmark which can be tested by reference budgets it is clear that in some countries it is too low to ensure a life with dignity.

Minimum income schemes should not be looked at in isolation. There is a need for an active inclusion approach that combines access to good quality services and support to enter employment with adequate minimum income as they are mutually reinforcing and all are a necessary part of ensuring that people can lead life with dignity. In this regard serious

concerns were expressed about recent cut backs in many services. It was also stressed that minimum income schemes do not exist in isolation. Other social protection schemes play a vital role in supporting inclusion in society and preventing poverty. Ensuring an adequate minimum wage is also vital. Without this it is unlikely that adequate minimum income schemes will be developed.

Raising awareness and building consensus vital next steps

A vital next step for EMIN and the national networks will be to raise public awareness of the vital role of minimum income schemes. Involving citizens generally as well as people experiencing poverty in a public debate as to what is necessary for a dignified life will be important in building consensus in favour of adequate schemes in each country. More thought will need to be given to presenting the vital role of minimum income schemes in a “sexy” way. It will also be important to build alliances with a broad range of actors in support of schemes.

Mainstream MIS in EU policy making

The issue of minimum income schemes needs to be mainstreamed into the heart of EU policy making and the implementation of the Europe 2020 strategy. Effective and adequate minimum income schemes are a vital tool for achieving the EU’s poverty and social exclusion target. In this regard several issues were stressed:

- The Commission’s proposals to allocate 20% of EU structural funds for social inclusion measures is very important and the European Social Fund can play an important role in helping Member States develop more effective minimum income schemes. It will be important that the Commission strongly encourage Member States to do so when developing their operational programmes;
- The role of minimum income schemes should be strongly reflected in the key moments of the European Semester. The Annual Growth Survey should report on progress in developing adequate schemes and set priorities for the coming year. All Member States should be asked to report on their minimum income schemes in the National Reform Programmes. Country specific recommendations on improving minimum income schemes should be made to those Member States lagging behind;
- The issue of adequate minimum income schemes should be a central concern in working to achieve the EU’s social objectives through the Social Open Method of Coordination and the bi-annual National Social Reports should devote a specific section to the issue;
- The Social Investment Package and the Commission Recommendation on investing in children are important developments and the development of effective and adequate minimum income schemes should be a key part of their implementation;
- Minimum income schemes also need to be taken into account in the current debate on the social dimension of economic and monetary union (EMU) and while the proposal to

develop a social scoreboard is welcome this need to lead to sanctions for countries who are not adequately addressing issues of poverty and social exclusion (e.g. by developing adequate minimum income schemes);

- The ongoing engagement of the European Parliament, the European Economic and Social Committee and the Committee of the Regions will be very important in the next stage of the EMIN project.

Conclusion

In conclusion it is clear that in one way what we are talking about is a small thing. The amount of resources required to establish adequate minimum income schemes is, in the totality of things, quite small. However, it is also clear from what people have said at this seminar that what the EMIN is about is also not a small thing – it is a very big thing. It is about building a fairer, more inclusive, less unequal Europe which guarantees decent and dignified social standards for all. Effective and adequate minimum income schemes can be a vital and relatively easy brick to put in place so as to build a new, rebalanced and inclusive European Union.

To anyone, to any policy maker, to any ordinary citizen who still might hesitate I would end where our chair for today, Julien Van Geertsom, began the seminar and quote some words from Nelson Mandela. They are from his inaugural Presidential speech in 1994:

Let there be justice for all.

Let there be peace for all.

Let there be work, bread, water and salt for all.

Let each know that for each the body, the mind and the soul have been freed to fulfil themselves.

Adequate minimum income schemes are an important step in achieving such a vision and if we do not achieve this vision I fear that we will not much longer have a social Europe and indeed a European Union at all.

Next Steps

Fintan Farrell EMIN Project Coordinator

Fintan Farrell thanked those who had contributed to a successful exchange. The five first countries will now take their message and communicate beyond their networks about the sort of society we are aiming for in an effort to build support for progressively implementing adequate Minimum Income schemes. The EU road map will be enhanced after the discussions of these two days: first feedback by the end of March 2014. The national conferences will be held between June and September 2014 and the final conference of the project in November 2014. The time of ‘crisis’ which we are living through may not seem the best time for trying to make progress on this topic but history has shown that it is often in times of crisis that bold steps forward are taken and that it is a times of crisis that we need

more than ever to have a clear vision for the type of society we want to build. A European Directive on Adequate Minimum Income Schemes would be such a bold step and provide a clear indication of the direction we want to go in. We must take advantage of the opportunity the EMIN project provides to bring as many people, organisations and institutions as possible together to champion the case for a social Europe.

Appendix 1: Seminar participants

Participants EMIN seminar

Speakers : Julian Van Geertsom, PPS Social Integration – Belgium, François Soulage, Secours Catholique (Member of EAPN France), Jean-Pierre Bultez, ONPES /les petits frères des pauvres (member of EAPN France) / AGE Platform Europe, Emma Toledano-Laredo, Head of Unit, European Commission, Vincent Billerey, Chef du bureau des minima sociaux, Ministère des affaires sociales et de la santé, Béatrice Ouin, European Economic and Social Committee, Sian Jones, EAPN Policy coordinator, Hugh Frazer, EMIN Management Team.

EMIN Partners: Elke Vandermeerschen, Belgium, Per K Larsen, Denmark, Izabella Marton, Hungary, Robin Hanan, Ireland, Paola Boffo, Italy, Nicoletta Teodosi, Gwendolyne Orchard, FEANTSA, Maciej Kucharczyk, AGE.

Other Members EMIN Management Team: Josee Goris, PPS Social Integration – Belgium, Sylvie Hanocq, ANSA, Ramón Peña-Casas, OSE, Denis Bouget, OSE, Jos Sterckx, SIRG, Paul Rosiers and Jonathan Devillers, Experts by Experience

EU Commission Staff : Bérengère Steppé,

EAPN: Richard Delplanque, Alain Greuillet, Michel Blanchard, Patrick Boulte, Samuel le Floch, Jeanne Dietrich, Sylvie Le Bars, all EAPN France, Barbara Helfferich, EAPN EU.

New EMIN Networks

Robert Rybaczek, Austria, Maria Jeliaskova, Bulgaria, Nicos Satsias, Cyprus, Dagmar Kocmánková, Czech Rep, Kalle Lane, Estonia, Samuel LeFloch, France, Maria Marinakou, Greece, Vilborg Oddsdóttir, Iceland, Elīna Ālere-Fogele, Latvia, Nathalie GEORGES, Luxembourg, Mila Carovska, Macedonia (FYROM), Maria Adele Farruggia, Malta, Jo Bothmer, Netherlands, Dag Westerheim, Norway, Kamila Płowiec, Poland, Helder Ferreira, Portugal, Raluca Manaila, Romania, Danilo Vukovic, Serbia, Zuzana Kusá, Slovakia, Katherine Duffy, UK.

EMIN Project staff team: Fintan Farrell, EMIN Project Coordinator, Anne Van Lancker, EMIN Policy Coordinator, Pauline Geoghegan, Project Staff Team

Appendix 2: full text of the input by Jean-Pierre Bultez on the French RSA:

Pour un « revenu minimum décent », pourquoi et comment ?

Présentation rapide, ayant été Président d'EAPN France et retraité après 30 ans dans des ONG (Caritas et petits frères des Pauvres), membre du Conseil de l'ONPES depuis 7 ans, Institution créée par la loi de lutte contre les exclusions en 1998.

Votre réseau travaille sur la question du revenu pour que les personnes puissent vivre dignement. Vous voulez contribuer à la lutte contre la pauvreté et les exclusions, sujet porté par EAPN et ses partenaires depuis près de 30 ans.

Une telle question imbrique une histoire sociale nationale, voire régionale et locale.

Il serait bon en préambule de distinguer dans les termes ce que l'on veut dire quand on utilise la formulation d'une vie décente et d'une vie digne ? Nul doute que cela renvoie à une approche relative, au sein d'un corps social en mutation. La dignité humaine est la même pour tous et conduit au respect de toute personne, quelle qu'elle soit. La décence correspond à « ce qui convient », qui est « honnête », ce qui respecte les « convenances ».

Je vais vous présenter rapidement dans une première partie la situation en France en matière de « minima sociaux », puis dans une deuxième partie j'aborderai la méthode choisie par l'ONPES pour élaborer « un revenu minimum pour une vie décente » et les enjeux ainsi posés.

Pour cela je pose deux questions :

Est-ce que Christophe Colomb a découvert l'Amérique : VRAI ou FAUX ?

Les minima sociaux existent depuis longtemps. Pour la France, 9 minima à des époques différentes se sont construits, le dernier en date étant le RSA (Revenu de Solidarité Active). Le système français de Protection Sociale reste fortement imprégné de l'approche « bismarckienne » centrée sur les salaires et donc le travail. Bien souvent, ces minima sociaux se sont élaborés en aval d'un dispositif d'assurance d'un risque spécifique, du fait que des personnes ne remplissaient pas des conditions pour être couverts.

Mais si nous regardons aujourd'hui ces prestations de minima sociaux, il conviendrait de ne pas les séparer de l'ensemble de la protection sociale. Car on peut schématiquement voir dans les prestations des minima sociaux, celles qui concernent les personnes ne pouvant se procurer des revenus issus du travail (vieillesse, handicap, invalidité), ou résultant de situations d'isolement (familles monoparentales) et celles en incapacité de travailler. On aborde ainsi la question de la responsabilité des personnes quant à leur situation, l'orientation prise depuis des décennies étant de poser des conditions, voire des contreparties à l'obtention de ces prestations.

Regardons rapidement ces minima sociaux français.

Le revenu de solidarité active (RSA) (2009) remplace le RMI (revenu minimum d'insertion) (1988) et l'API (allocation de parent isolé). Le "RSA chapeau" ou "RSA activité" est un complément de salaire pour les salariés qui ont peu de revenu : il a été créé pour inciter les chômeurs à accepter un travail avec un complément de revenu plutôt que de rester au chômage. Aujourd'hui, certains salariés à temps partiel et certains salariés au Smic peuvent bénéficier du "RSA activité" en fonction du revenu de leur foyer et la composition de leur famille. **(1,6 million)**

L'allocation de solidarité spécifique (ASS) (1984) est versée sous certaines conditions d'activités antérieures et de ressources aux travailleurs privés d'emploi ayant épuisé leurs droits au chômage (système assurantiel). (370 000 personnes)

L'allocation équivalent retraite (AER-R) (2002) est un revenu de remplacement ou de complément versé aux personnes involontairement privées d'emploi qui ne sont plus indemnisées par l'assurance chômage, qui ont le nombre de trimestres requis pour percevoir leur pension de retraite, mais n'ont pas 60 ans. Elle est remplacée par l'Allocation Transitoire de Solidarité **(ATS)** depuis 2011. (37 000 personnes)

L'allocation d'adulte handicapé (AAH) (1975) est un revenu minimum garanti à toute personne reconnue en situation de handicap. (950 000 personnes)

L'allocation supplémentaire d'invalidité (ASI) (1957) complète une pension d'invalidité ou une pension de veuf ou veuve invalide. (84 000 personnes)

L'allocation de solidarité aux personnes âgées (Aspa) (1956) est un revenu minimal pour les plus de 65 ans ayant peu ou pas cotisé pour leur retraite, ou les plus de 60 ans inaptes au travail. Elle remplace le minimum vieillesse. (570 000 personnes)

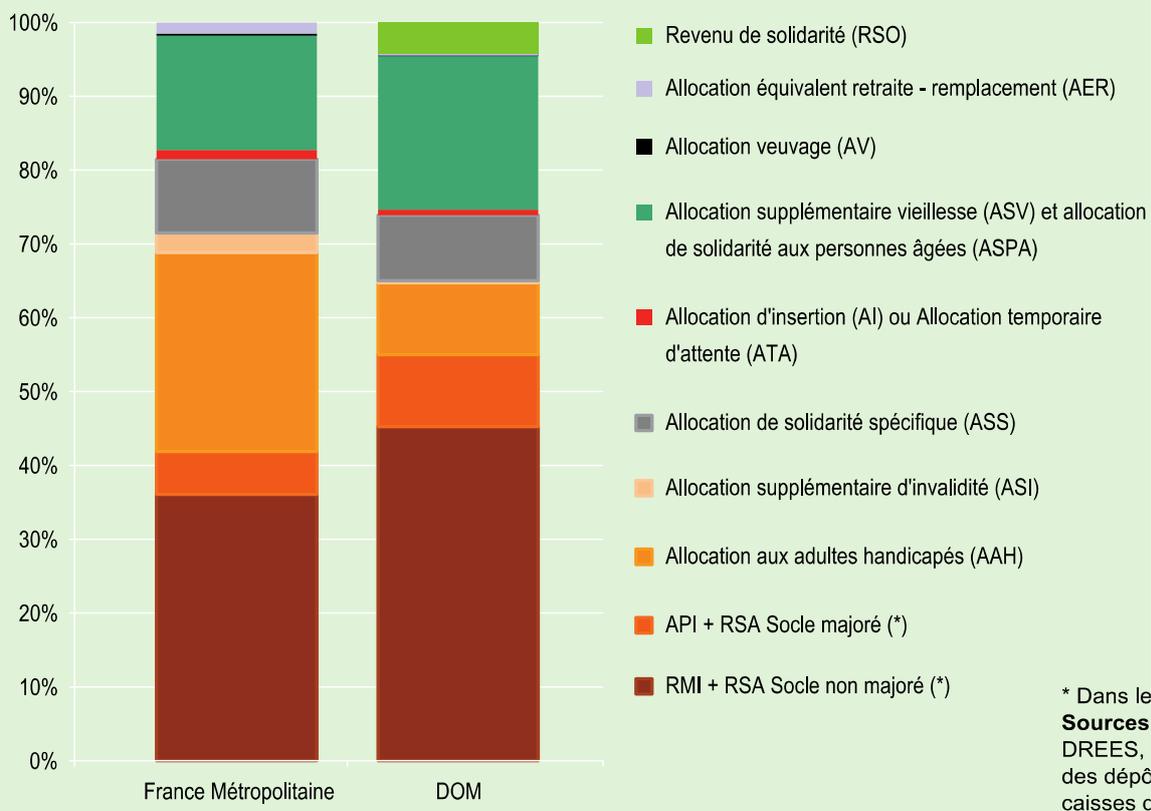
L'allocation temporaire d'attente (ATA) s'adresse aux demandeurs d'asile, anciens détenus libérés, apatrides, victimes de la traite des êtres humains ou du proxénétisme et aux personnes en attente de réinsertion. (47 000 personnes)

L'allocation veuvage (AV) (1980) pour les conjoints survivants d'assurés sociaux décédés. (7000 personnes)

Le revenu de solidarité (RSO), créé en décembre 2001 et spécifique aux DOM, est réservé aux personnes âgées de 55 à 64 ans, bénéficiant du RSA depuis au moins deux ans et qui s'engagent à quitter définitivement le marché du travail. (12 000 personnes)

■ GRAPHIQUE 3

Répartition des minima sociaux en France métropolitaine et dans les DOM en 2010



Au total plus de 3,7 millions de personnes sont allocataires de ces 9 minima sociaux en 2013, ils étaient 3,3 millions en 2003. Depuis 3 ans, la hausse est de 2,5% par an. Au total, avec conjoints et enfants, cela représente **10% de la population soit 6,6 millions de personnes**. C'est bien sûr la dégradation de la conjoncture économique qui explique cette évolution, car 43% des bénéficiaires le sont au titre du RSA socle, c'est à dire l'allocation qui intervient après les allocations de chômage, quant il y en a.

L'ASS augmente du fait du chômage persistant et croissant.

L'allocation AAH pour les personnes handicapées poursuit sa hausse, du fait d'un relèvement des seuils qui la déclenchent.

Dans les territoires d'outre mer, ce sont le RSA socle et le minimum vieillesse qui regroupent 75% des allocataires de minima sociaux. C'est dire qu'il y a aussi un lien entre les territoires (certains, à l'économie faible et au marché de l'emploi insuffisant) et les bénéficiaires de prestations.

Ces « minima sociaux » donnent des résultats inégaux pour des publics très différents. Mais **quels objectifs** ont été identifiés ?

- Le maintien d'une certaine « cohésion sociale »

- Une incidence re-distributive « verticale », en réduisant les écarts de niveaux de vie
- Les prestations sont « non contributives », non soumises à « cotisation » pour les bénéficiaires, dans une logique de « solidarité »
- La lutte contre la pauvreté, « ne pas tomber dans la pauvreté », pauvreté monétaire à 60% du revenu médian, pauvreté en conditions de vie. Les travaux publiés indiquent que ces minima sociaux ont un impact de 1,5 point (sur le seuil de pauvreté) sans pour autant faire passer les bénéficiaires au dessus du seuil de pauvreté (977 euros par UC Unité de Consommation en 2011 en France)
- Les prestations réduisent le nombre de « pauvres » (au sens habituel du terme) et surtout l'intensité de la pauvreté, les prestations des « minima sociaux » sont pour l'essentiel à plus de 80% distribués aux 20% des personnes les plus pauvres. D'une certaine façon, l'impact est plus certain sur l'intensité de la pauvreté, puisque ces prestations augmentent les revenus des personnes bénéficiaires, l'estimation étant de - 6 points sur le taux de pauvreté
- L'accès à ces prestations se fait sur « critère de ressources », les destinant aux ménages les plus modestes mais fait de ces prestations, une part très importante de leur budget.

A ces « minima sociaux » il convient d'ajouter les prestations familiales et les aides au logement, qui ne sont pas directement ciblés sur les ménages les plus modestes, mais qui contribuent sensiblement à l'amélioration de leurs situations. On estime à 2 points, l'impact sur le seuil de pauvreté.

L'accès aux soins avec la CMU et la CMU-C et l'ACS constituent autant de formes de minima sociaux en nature, « non monétaires », mais dont l'accès dépend du statut de bénéficiaire d'un minima social.

Des questions identiques :

- les bénéficiaires sont-ils des nationaux, des citoyens de l'UE, des résidents non européens UE
- l'accessibilité aux prestations est-elle adaptée : lisibilité, documentation en plusieurs langues,
- les allocations sont-elles individuelles ou familiales, et les bases de calcul sont-elles adéquates ? les enfants sont-ils pris en compte et comment ? les montants/valeurs pour personnes seules ou en couple ?
- les sommes versées sont-elles récupérables selon des procédures claires ?
- le « non-recours » à ces allocations : 65% pour le RSA activité, peut-être 30% pour le minimum vieillesse.
- le niveau des allocations, est-il en lien avec un objectif (sortir de la pauvreté, avec ou sans conditions d'attribution, donc avec une visée minimaliste-on parlera des besoins vitaux, ou pour les maintenir dans la société, avec un montant indexé sur les salaires, pour réduire les inégalités de revenus)

- l'indexation des montants,
- la durée des attributions et les renouvellements,
- l'accès à des droits connexes, des tarifs spécifiques (énergie, téléphone, primes Noël, ...)
- les changements institutionnels ou de gestion administrative (l'exemple le plus frappant étant l'allocation équivalent retraite de remplacement (AER-R), supprimée en 2009 et 2010 puis rétablie mais plus restrictive sous forme d'allocation transitoire de solidarité (ATS) en 2011
- la fiscalité attachée rendant ces montants imposables ou non, ou l'exonération de certaines taxes (audiovisuel)
- l'institution en charge de l'allocation, si l'allocation est nationale, la gestion est départementale, proche des habitants.
- les bases éthiques sont celles de la solidarité, mais l'évolution pousse aussi à des formes de répartition (ex : les impayés de loyers, payés en fait par tous les locataires qui payent leurs loyers)
- les minima sociaux répondent-ils aux perspectives de genre ?
- les prestations sont-elles insérées dans d'autres dispositifs accompagnant les personnes pour qu'elles sortent de ces prestations ? les politiques d'activation ?
- par la prestation, la constitution d'autres droits (ex la retraite).

Si l'on observe les conditions de vie des bénéficiaires de minima sociaux (Enquête DRESS 2012 non publiée à ce jour), ce sont les restrictions de consommation qui dominent et sont les plus répandues : payer une semaine de vacances, remplacer les meubles, acheter des vêtements neufs, offrir des cadeaux, posséder deux paires de chaussures, recevoir des amis).

Le recours aux aides alimentaires touche près de 10% des bénéficiaires. Si la famille et l'entourage peuvent accordé des crédits, ces montants servent essentiellement aux dépenses d'alimentation et du logement. Les équipements en biens durables sont également pénalisés pour les bénéficiaires.

Donc OUI, Christophe Colomb a bien découvert l'Amérique, mais quelle Amérique ? Nous avons des dispositifs nombreux, élaborés au fur et à mesure, adaptés progressivement. Mais pour autant, ils ont peu réussi à sortir les bénéficiaires de la pauvreté (monétaire ou en conditions de vie), si tant est que cela ait été leur objectif commun. Le nombre de bénéficiaires est croissant, notamment du fait de la dégradation du marché de l'emploi et du travail. Faut-il s'en satisfaire ?

Au fond, les minima sociaux se sont construits sur une base « minimaliste », conduisant à des « compléments » (santé et accès aux soins, aides au logement, aides alimentaires, tarifs spécifiques dans l'énergie, les transports, la scolarité, les repas, ... etc) que le citoyen doit demander s'il veut en bénéficier. Ces minima se sont construits sur **la base d'un statut et non de besoins.**

On est passé d'une vision des minima sociaux comme de compléments aux dispositifs assuranciers, à celle d'apports à des groupes spécifiques (femmes avec enfants), puis à

celle de ressources pour des personnes sans emploi. Les dispositifs d'accompagnement étaient très hétérogènes.

Depuis des années, nulle interrogation sur le niveau de ces « minima sociaux ». Seul le RSA socle établi au départ (RMI en 1988) à 50% du SMIC Net a vu son taux décroître, malgré le rôle vital de cette prestation, dernier rempart contre la misère, 3^e volet de l'assurance chômage.

Est-ce que Marco Polo a découvert la Chine : VRAI ou FAUX ?

Un autre horizon est à construire, plus en phase avec les besoins des citoyens, leurs demandes étant que **leur citoyenneté soit reconnue**, en matière de ressources notamment, pour vivre dans la dignité.

A côté d'une architecture de « minima sociaux », avec leurs droits complémentaires, cherchons le revenu permettant de vivre une vie décente, incluant donc l'ensemble des charges et services qui y contribueraient. Un tel budget permettrait d'éviter les multiples recours à des droits connexes.

Un autre aspect s'impose : dans nos démocraties, le repère de 60% du revenu médian est-il compris et accepté pour définir le seuil sous lequel on est considéré comme « pauvre », ou en « risque de pauvreté ». Assurément NON. Ce seuil de 60% date de 2001, dans une Union à 15. Il a été maintenu ensuite et étendu à tous les nouveaux entrants dans l'Union. **Il manque une « acceptation politique » d'un seuil de pauvreté, par les citoyens.**

Dans la stratégie UE 2020, l'Union a étendu la compréhension de la pauvreté à d'autres indicateurs, en conditions de vie et en rapport à une faible activité. Mais l'inclusion active (2008) qui reste la doctrine de fond retient que le revenu se complète d'un accès à des biens et services, donnant ainsi une meilleure approche de la participation des citoyens à la société. Il s'agit donc de répondre aux **besoins essentiels de la vie quotidienne**, qui satisfasse ce besoin d'être dans la société et d'y participer.

Mais QUI peut parler des Besoins et comment le faire ? En Europe, depuis plusieurs années, les travaux universitaires et de chercheurs donnent des réponses différentes. Ils sont nombreux et documentés. Plusieurs s'appuient sur des mesures de consommations à partir de sources statistiques, d'autres sur les citoyens, regardés comme des « experts » de leurs situations, avec aussi des compléments d'expertises plus pointus si besoin.

De quoi s'agit-il ?

Créer dans le paysage social un nouveau repère, basé sur les **besoins des personnes pour vivre une « vie décente »**.

Indicateur établi de façon relative. Il dépendra des territoires, des configurations familiales, des capacités d'accéder aux services publics. Des citoyens, considérés comme des

« experts » de leurs situations, peuvent par « consensus » établir /construire un budget leur permettant de dire que leur vie sera décente.

Indicateur construit par les citoyens sur la base d'un « **modèle social** »(ambient). Prenons l'exemple de l'emploi : est-il un objectif pour les hommes et pour les femmes, OUI au regard des objectifs de l'UE 2020. Mais n'y aurait-il pas un modèle alternatif, où la femme travaillerait et développerait une carrière professionnelle, et l'homme serait « au foyer » pour le « care » des enfants et parents âgés, avec un emploi à temps partiel faiblement rémunéré ? Ces hypothèses ne sont pas encore dans les esprits ! L'alimentation, les vêtements présentent des besoins sur la base des « produits standards » en vigueur. En matière de santé, les compléments de couverture des frais de santé obligent à souscrire des mutuelles. A quel niveau ?

Ainsi, sur la base d'un modèle social où l'on travaille ou reçoit une pension (issue de son activité professionnelle passée), cet indicateur aura vocation à mesurer l'écart avec les ressources perçues réellement et donc la capacité à mener une vie décente.

L'analyse par poste de dépenses permettra ensuite de voir sur quoi portent les écarts. Basé sur les besoins ce sera aussi **un outil de gestion budgétaire**.

Comment élaborer un tel budget pour une vie décente?

Si les citoyens sont les premiers experts de cette question, il faut regarder très précisément la méthodologie employée. Des questions de cohérence se posent. La composition des groupes de citoyens constitue un point central. Car parler de conditions de vie décentes traverse toutes les catégories socio professionnelles. A constituer des groupes uniquement avec des personnes elles mêmes « pauvres » risquerait de conduire à des budgets eux mêmes tirés vers le bas et donc à un « pauvre » revenu minimum décent. Prenons l'exemple de l'alimentation : outre les produits retenus, l'équilibre alimentaire, la qualité, les quantités sont à prendre en compte. Une vie décente ne supporte pas de « mal manger », voire de « très mal manger ». Les groupes de citoyens interrogés sont donc invités à de multiples niveaux à apporter **des réponses par « consensus »**. Les méthodes de « négociation » au sein d'un groupe, puis de « validation » des paniers de biens et services sont appelées à être rigoureuses. Là aussi, le mode de vie « commun » sur lequel les citoyens se mettent d'accord reste celui assurant une participation à la vie sociale et collective.

Mais une expertise externe aux groupes de citoyens est nécessaire pour éclairer certains aspects présentant des disparités entre groupes, des points plus techniques comme l'amortissement des équipements peuvent donner lieu à des écarts entre les « usages » et les « garanties ».

Pour avoir participé à ces travaux, je peux témoigner que les biais sont multiples. On peut facilement faire l'impasse de certains besoins/coûts dans les groupes au lieu de toujours

donner le dernier mot aux citoyens. Le « consensus » a besoin d'être « éclairé » pour être réussi.

Situer ce « revenu minimum décent », dans l'ensemble des prestations sociales ?

Nous sommes dans un environnement de « droits », d'Etat de droits, les traités et chartes internationales les mettent en avant. Une vie décente pour les citoyens, comme objectif des politiques publiques, est-elle atteignable? Economiquement, mais aussi socialement. Les questions posées au départ pour les « minima sociaux » subsistent. Elles peuvent trouver réponses à la lumière de ces revenus minima pour une vie décente. On peut ainsi redire le contrat social nous liant tous.

Un revenu minimum pour une vie décente, n'est pas un revenu « minimaliste », de survie. Une fois établi et actualisé, il devient un repère pour les systèmes de prestations et l'approche des évolutions en matière de prestations sociales (construction, niveau, accessibilité).

Gageons que ce sera un outil plus dynamique que celui d'une simple indexation de prestations. Il permettra des comparaisons avec les dispositifs sociaux, nationaux ou locaux, la part des lignes de dépenses dans les prestations, les échelles d'équivalences, ...

Faut-il que ce nouveau repère devienne lui même une obligation, un droit pour le citoyen européen, dans chaque Etat ? Voilà de nouvelles questions auxquelles nous aurons à répondre.

Ce « revenu pour une vie décente » deviendrait-il le seuil pour une inclusion sociale?

Cette interrogation n'est pas neutre, car elle conduirait à « compter » le nombre de « pauvres », différemment de la méthode en place, combinant seuil de pauvreté monétaire (60% du revenu médian), conditions de vie et activité minimale (UE 2020). Dès lors en effet que l'élaboration du revenu (minimal pour une vie décente) intègre des conditions de vie jugées décentes et des ressources permettant de vivre et participer à la société, on dispose ainsi d'un nouveau repère.

De fait, en mettant en avant le terme de « vie décente », on donne une approche citoyenne, qualitative dans l'élaboration du budget, au delà du repère statistique des 60% du revenu médian qui reste abstrait. C'est ainsi que les citoyens y reconnaîtraient une approche plus réaliste. Ne pas pouvoir vivre décemment, n'est-ce pas s'écarter des autres citoyens, s'exclure du corps social ?

Les collectivités locales pourront ainsi mesurer ce qu'un « service public » peut apporter à tous les citoyens, sans pour autant ouvrir des « droits » spécifiques à certaines catégories de population.

Plus largement, tous les pouvoirs publics (nationaux, régionaux, locaux) peuvent réinterroger leurs politiques sociales et réarticuler les stratégies de revenus minima, de

tarifs sociaux, d'insertion sociale, d'accès aux services publics au regard de ce revenu minimum décent qui devient un outil de mesure de l'inclusion sociale.

En conclusion:

En France, l'ONPES a engagé ce travail depuis deux ans (avec le CREDOC et l'IRES) et va aboutir début 2014 avec la présentation méthodologique et la publication des travaux menés avec plus de 150 citoyens sur le sujet. Il s'est inspiré des travaux et méthodes anglaises (Donald Hirsch et la J Rowntree Foundation), irlandaises et belges. Mais il a fallu aussi adapter, creuser des points spécifiques dans un contexte français.

Une fois les résultats disponibles, il faudra convaincre, interpeller, ajuster l'outil à des publics, des territoires, ... Attention à ne pas voir s'émietter les résultats, car on risque de perdre de vue l'essentiel. Si le seuil de 60% du revenu médian est peu porté par les citoyens, il ne faudrait pas que ce « revenu minimum décent » échappe aux citoyens, alors qu'il a été élaboré par eux.

Ce travail apporte un nouveau regard sur les légitimités en matière de compréhension de la pauvreté et de sa mesure, de vie décente et donc de dignité. C'est bien **la participation des citoyens** qui donne la légitimité à ces travaux et résultats, et donc les rend pertinents. Voilà l'une des conclusions essentielles de ce travail, en route dans l'Union.

Le nouveau chantier ouvert par les orientations de février 2013 et la Commission Européenne, d'un outil méthodologique destiné à tous les Etats membres en faveur de l'élaboration de ce type de revenu pour une vie digne constituera une nouvelle avancée en 2014.

Alors, Marco Polo aurait-il découvert la Chine : OUI, mais quelle Chine ? Celle des chinois assurément !