Social inclusion in the new Member States

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This report examines the main challenges which the 10 new Member States will have to face in order to combat poverty and social exclusion and promote greater social cohesion, in parallel with their efforts to gradually close the current gaps in competitiveness and living standards vis-à-vis the rest of the Union. Its overall aim is threefold.

First, by providing an overview of the situation and of main policies across the new Member States, it provides a basis for promoting exchange and learning between them and old Member States.

Secondly, by identifying key priorities for the future it aims to assist the new Member States in the further development of their social inclusion policies and in particular their first National Action Plans for social inclusion, to be submitted by July 2004.

Thirdly, by identifying the most critical features of the situation in the new Member States it helps to highlight issues that may need to be taken more into account in the further development of the EU social inclusion process after enlargement.

This report is based on work carried out bilaterally since October 2002, which led to the joint signature of 10 Joint Memoranda on Social Inclusion (JIM) by Commissioner Anna Diamantopoulou and the Ministers responsible for Social Affairs of the new Member States on 18th December 2003. The context for preparing the JIM was provided by the conclusions of the Göteborg European Council in 2001 that asked the Commission and the candidate countries to initiate a cooperation process with the aim of promoting their full participation in the economic and social policies of the Union. The purpose of compiling a JIM was to prepare each country for full participation in the open method of coordination that had been launched in the context of the Lisbon strategy with the aim of making a decisive impact on the eradication of poverty in the Union by 2010. Under this process every Member State has prepared a National Action Plan on social inclusion (NAPs/inclusion) every two years on the basis of a set of common objectives that were agreed first at the European Council of Nice in 2000. The NAPs/inclusion are assessed jointly by the Commission and the Council with the help of commonly agreed indicators.

Each JIM outlines the principal challenges facing a country in terms of poverty and social exclusion, presents the major policy measures taken by each new Member State to start translating the EU's common objectives on poverty and social exclusion into national policies and identifies the key policy issues for future monitoring and policy review.

This report is in two parts. Part I is a cross-country analysis identifying the extent and main trends in poverty and social exclusion and the underlying economic, social and demographic factors. In the light of this, it summarises the key challenges facing the new Member States. It then reviews the main policy approaches being adopted to address the challenges and suggests priorities for the future both in terms of policy development and of institutional arrangements. There are also specific sections examining gender mainstreaming, the adequacy of the existing statistical systems and indicators and the role that EU Structural Funds can play in achieving the social inclusion goals set in the JIM. Part II of the report contains short summaries of the key features and key challenges facing each new Member State. A statistical annex provides data comparing the situation across new Member States and makes comparisons with old Member States.