



Meeting of the European Parliament Interest

Group on Carers

Carers and EU action in the field of social exclusion

4 February 2015, 13.00 – 14.30

Session 1

Jean Lambert MEP opened the meeting, underlining her personal interest in the topic; carers are at a risk of poverty and social exclusion and the various EU initiatives need to be checked for their impact on and relevance to carers as a specific risk group. She reminded the audience of her Report on access to care for vulnerable groups. This contains a number of specific references to carers, and advocates the need for an EU Carers' Leave Directive. While the EU's competence for direct legislation in this area is limited, there are indirect ways of addressing the issues. In this context it is regrettable that the review of the Europe2020 Strategy has been pushed back until 2016. Nevertheless, there are other relevant initiatives such as the New Skills for New Jobs initiative, the Structural Funds and the Social OMC. It might also be interesting to have a closer look at the European Semester process and see if references to carers and long term care could be inserted.

The first speaker, **Clare Cairns Coalition of Carers in Scotland** underlined the fact that, in the case of carers, the personal is political, as across Europe, unpaid family carers and friends are the largest providers of health and social care support. As demographic change increases demand, the 'balance of care' increasingly shifts to informal care, with women being disproportionately affected and more likely to give up paid employment in order to provide care.

In terms of the impact of caring on finances, out of the 23 countries in Europe which offer any type of financial support, only 9 offer direct support in the form of a carer allowance. Research in the UK has shown that carers face 77% higher utility bills and 67% higher transport costs, and that a third of carers are in debt. Support to carers is generally inadequate. Respite care services (the most common of support services on offer to carers) are provided in 21 European countries; training and information are provided in 17 countries, counselling in 12 countries. In general though, only 1 in 5 carers in the UK receive no practical support with caring.

Research in the UK has shown that caring for a loved one can lead to isolation and loneliness: 83% of carers have felt lonely or socially isolated as a result of their caring responsibilities, 75% of carers said it was hard to maintain relationships and social networks because people do not understand the impact that caring has and 57% lost touch with friends or family. Gender is a crucial factor: across Europe, 2/3 of carers are women. Women are also more likely to be 'sandwich' carers (caring for older parents and young children at the same time) and are more likely to give up work to care. In the UK, one in every 5 carers had to give up their jobs because they were in crisis, and half of working age carers live in a household where no-one is in paid work. Support for those carers that try to combine employment and care varies across Europe. There are some specific societal groups which need special attention, e.g. carers from ethnic minority groups, young carers/young adult carers, carers from rural and island communities,

carers from LGBT communities, carers looking after someone with mental health issues or drug/alcohol misuse issues.

Caring can have negative impact on physical health as research has shown that, in the UK, 50% suffered a physical injury or seen a deterioration in their health, 75% said they could not get a good night's sleep, 46% said they had fallen ill but had no choice but to continue to care. Mental health is also at risk: 63% of carers had suffered from depression as a result of caring, 20% higher prevalence of mental health problems in the caring population (EU wide). This impacts on the quality of care as more anxious and depressed carers report more incidents of abuse. In the UK, six in 10 carers have been pushed to breaking point, with one in 4 these requiring medical treatment as a result and 1 in 8 requiring emergency care. Obviously, the costs related to the above facts and figures are staggering.

Clare underlined the need to move from the recognition of the contribution of carers to giving carers actual rights: these rights should not be seen *'as a party political issue, but a human issue, a community concern, a common responsibility which does and will affect all of us at some time in our lives'*. In Scotland, a Carers Bill is going through the political system now which will extend new rights to carers. Carer Organisations are campaigning for the Bill to *give* carers the right to the support they need to sustain them in their caring role, based on a National Framework that ensures this right is implemented consistently.

Policies need to be put in place with a focus on financial support (an income for carers based on a minimum wage), employment (flexible working, paid leave, unpaid leave) and regular breaks from caring (minimum entitlement for those with substantial caring roles). Furthermore, Clare referred to a Motion on Poverty which was adopted at the 2014 Eurocarers General Assembly, and expressed her support for the Eurocarers campaign to put in place an EU level Carers' Strategy, while also strengthening the carer focus in other EU work streams.

The next speaker was **Ralf Jacob (European Commission, DG EMPL, Head of Unit Social Protection and Activation Systems)** who stated that a distinction should be made between choosing to care and having to care – the second is a direct reflection of a lack of social protection and impacts carers very differently. While the Commission does not currently have a specific focus or initiative on caring several initiatives are relevant, such as the 2013 Staff Working Document on long term care and the 2014 Social Protection Committee/EC report on *Adequate social protection for long term care needs in an ageing society*.

Ralf Jacob's colleague **Sven Matzke (European Commission, DG EMPL, Team Leader, Social Protection and Activation Systems)** then provided information on EU initiatives on poverty and social inclusion which impact on carers. A set of relevant key messages was adopted by the EPSCO Council in June 2014 in relation to the Social Protection Committee report on long term care, and these explicitly refer to the need for adequate social protection for long term care needs (as there are *'significant health-related economic and social risk for individuals/families'*) and the need for Member States to move from a reactive to increasingly proactive policy approaches (*'enhancing support for informal carers and making it easier for them to reconcile employment and care responsibilities'*).

In relation to carers and employment, it has been found that the impact of care on labour force participation is significant only when individuals provide a high intensity of care (i.e. 20 hours/week or more); this impact does not seem to be significant in northern Europe, but this is not the case in the south. The explanation for this difference could lie in the fact that informal

carers are better able to reconcile care responsibilities and employment in countries with well-established and highly utilised formal care services and support policies for informal carers.

In terms of compensating and recognising carers, various measures exist across the EU, related to carers' allowances, tax credits and pension rights. With respect to reconciliation of work and care, unpaid leave, paid leave and flexible working arrangements do exist, but the extent varies across the EU. Measures relating to training, counselling and respite care are also in place in some countries.

Other EU initiatives also relate to carers, such as the Europe 2020 strategy, as the impact of caring responsibilities are relevant for achieving the employment and poverty targets. The 2013 Social Investment Package also explicitly refers to the need to addressing the gender dimension (higher poverty among elder women (*'caused by unpaid household, childcare and LTC task'*), and calls for social investment throughout the individual's life (*'the contributions of older people to society as carers for others or volunteers are often overlooked, and they should be given adequate support to pursue this'*). Moreover, the Package included a specific Staff Working Document on Long-term Care. Sven Matzke also referred to EU reconciliation policies, and the possibility of a future Directive on carers' leave. In its *Strategy for equality between women and men 2010-2015* the Commission had already announced its intention to assess remaining gaps in entitlement to family-related leave, including carers' leave, and the options for addressing them. It remains to be seen if the new Commission will take an initiative in this respect on which social partners would need to be consulted.

The Commission also works towards sound data gathering on carers and their situation and has a number of tools at its disposal. Clearly, there are serious knowledge gaps with respect to the breadth and depth of social protection coverage across the EU. The Commission is trying to improve the evidence base in this respect through the Labour force survey (improve questions on impact of caring on employment), the EU- SILC survey (adding questions accessibility of long term care services), the MISSOC data base, and importantly, a joint Project with OECD on 'Measuring adequacy of social protection for long-term care needs'. As benefits to carers are part of social protection, it is planned to add this dimension in the second phase of the project (2016-2017).

Marian Harkin MEP took over the chair and complimented the Commission on the joint initiative with the OECD as this will provide useful data for advocacy and policy development. Marian Harkin also expressed her regret at the postponement of review of the Europe2020 strategy and underlined the potential of the European Semester process to include issues that have a bearing on carers and their situation. She congratulated Jean Lambert MEP on her initiative to call for a Carers Leave Directive and underlined her intention to urge Commissioner Thyssen to take action in this field.

Session 2

The second part of the meeting consisted of a round of responses from panellists, chaired by **Heinz K Becker MEP**, and the first speaker was **John Dunne (President, Eurocarers)**. John Dunne started out by thanking the Commission for their engagement in this topic and the clear recognition of the need to address issues relating to long term care. While Eurocarers realises that it will be difficult to get the support for a specific EU Carers' Strategy, there may be scope for a broader initiative on long term care. Eurocarers is committed to help substantiate the OECD and SPC reports on long term care, and offer alternative perspectives to advance the debates. In order to make a concrete contribution to the SPC report - in particular to the national long term care profiles - Eurocarers is developing a comprehensive framework for its members to

become engaged in this work. The starting point is the legal framework as this varies hugely between member states, and this is the first information that is being collected.

John Dunne's second point related to the limited competence of the EU in this field. Despite this fact initiatives are being taken - such as the social OMC - and Eurocarers can act as an important bridge between the EU and carers at national level to facilitate that dialogue. While a specific initiative addressing carers is not going to be a reality in the short term, it is clear that the issue has arrived on the policy agenda and that is highly important.

Sian Jones (Policy Coordinator, European Anti-Poverty Network) briefly introduced her organisation and its activities, which have a special focus on integrated and rights based strategies to address poverty and social exclusion at EU and national levels. EAPN focuses on the big picture as well as on specific societal groups and issues. Currently the organisation has a strong focus on big initiatives such as the European Semester and Europe2020 as those overarching initiatives are bound to have the highest impact. EAPN members are actively engaged in the work. While EAPN has not specifically addressed carers and their poverty and social exclusion issues as such, the topic is highly interesting. EAPN has worked in the area of unpaid work and Sian Jones underlined the need to bring issues relating to paid and unpaid care work together as they impact on each other. There are a lot of hidden issues in this area with women being most affected, especially in view of the current policy shift towards community care with the state only playing a minimal role. The question for the near future is 'who cares'? These bigger picture issues and the accompanying trends need to be challenged and this could be done by raising awareness of the issues (which are still largely hidden) and of how close the link with poverty and social exclusion is. EAPN runs a network on minimum income and Eurocarers could participate in that.

Sian Jones also recommended looking at the EU Structural Funds as, as 20% of these Funds should be devoted to combating poverty and social exclusion. The European Semester and Europe2020 are also crucial. Lastly, Sian Jones expressed her support for a European Carers' Strategy, which should also make the link with paid care work. She underlined the need to be wary of the societal model that the EU is currently promoting – there is a great emphasis on growth and jobs, but the commitment to rights and combating poverty and social exclusion is not always easy to detect.

The final speaker, **Pierre Baussand (Director, Platform of European Social NGOs)** stated that it is time that inadequate policies were replaced by sound ones. Inadequate policies have a huge and negative impact on carers. The entire ecosystems around caring should be looked at as the current trends give reason for concern. It is mostly women that are affected, as women are expected both to contribute to the labour market as well as provide care for children and dependent family members – and this expectation is unrealistic. The maternity and parental leave directives do not suffice to address the situation of carers and a new care directive should recognize the diversity of families and circumstances. This is difficult as we need legislation which is broad enough to respect diversity and specific enough to suit individual needs. The Social Platform subscribes to a number of principles relating to care services, i.e. these need to be affordable accessible, available and of high quality and these should be part and parcel of any future legislation addressing carers.

Pierre Baussand also emphasized the need for an EU Carers Strategy to include a legislative part which should take account of the differences between national systems and approaches, leaving room for national implementation. It would be useful to bring organizations together and draft such a Carers Directive, which could then become a Citizen's initiative, with and for citizens.

Audience debate

The following issues were raised:

Research and mutual learning:

Questions were asked about the kind of research that has been done and what is planned for the future. Should we not look into the consequences of certain policies and learn the lessons from the past to improve future policy development? The diversity of Member States can be used to our advantage in this respect – we can learn from diversity.

Horizon2020 has a work stream on sustainable and health care, which would offer some possibilities for this type comparative research. The priority is to get reliable data. The Commission is inserting specific questions in to the SILC surveys to strengthen the evidence base.

What is adequate social protection?

When and where families fail to provide care it is disastrous. Pushing the responsibility to provide care from the state to families and communities is a trend but only in a minority of countries (such as the Netherlands). A solid knowledge base of what constitutes adequate social protection in this area is needed. There needs to be adequate social protection, given the increasing long term care demand and the decreasing care potential and limited budgets. In order to close the gap between supply and demand we need to look at where policy makers should invest to decrease this gap. Prevention of dependency would be one option.

Self-identification:

As the self-identification of carers is low, questions in surveys should be phrased so that carers actually recognize themselves. Otherwise the information obtained will not be reliable.

Education and training:

There should be more emphasis on education and training of carers, carers and their organisations need to be more professionalized as this will help increase self-esteem and ensure a voice and a place in society.

Conclusions and close

In his closing remarks, **Heinz Becker MEP** underlined prevention as one of the keys to addressing the long term care gap. We also need good ways to measure prevention and research what works well in this field. The three trends – increasing care demand, decreasing care supply and limited budget – provide the context in which we have to find solutions.

Sirpa Pietikainen MEP underlined the need for concrete action, also by the Parliament. For instance, the Interest Group co-chairs could push for an Own Initiative report on long term care/carers as this touches on so many aspects: employment, pensions, health training, gender equality and many others. A Written Declaration would also be helpful.

Christine Marking, 9 February 2015