TUNI Luottamuksellinen - Confidential (3Y)

MERGE

MEASURING WHAT MATTERS

Policy pathways to sustainable and inclusive wellbeing

Measuring what matters: Sustainable and Inclusive wellbeing in the European Pillar of Social Rights

Workshop. June 3, 2025 - 9:30-11:30

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Agenda

Discussion under the Chatham House rules

09:00-09:30
Welcome coffee

09:30-09:40
MERGE Presentation

09:40-09:50
Impulse presentation with speakers

09:50-10:25
First activity: Priorities for the EPSR review

10:25 –10:35
Discussion of the results

10:35 –11:05
Second activity: SIW and the Social Scoreboard

11:05-11:15
Discussion of the results

11:15-11:30
Closing remarks

MERGE

MERGE is Horizon Europe funded Coordination and Support Action (CSA) project with an aim to find pathways towards inclusive and sustainable wellbeing. MERGE consists of 16 partners.

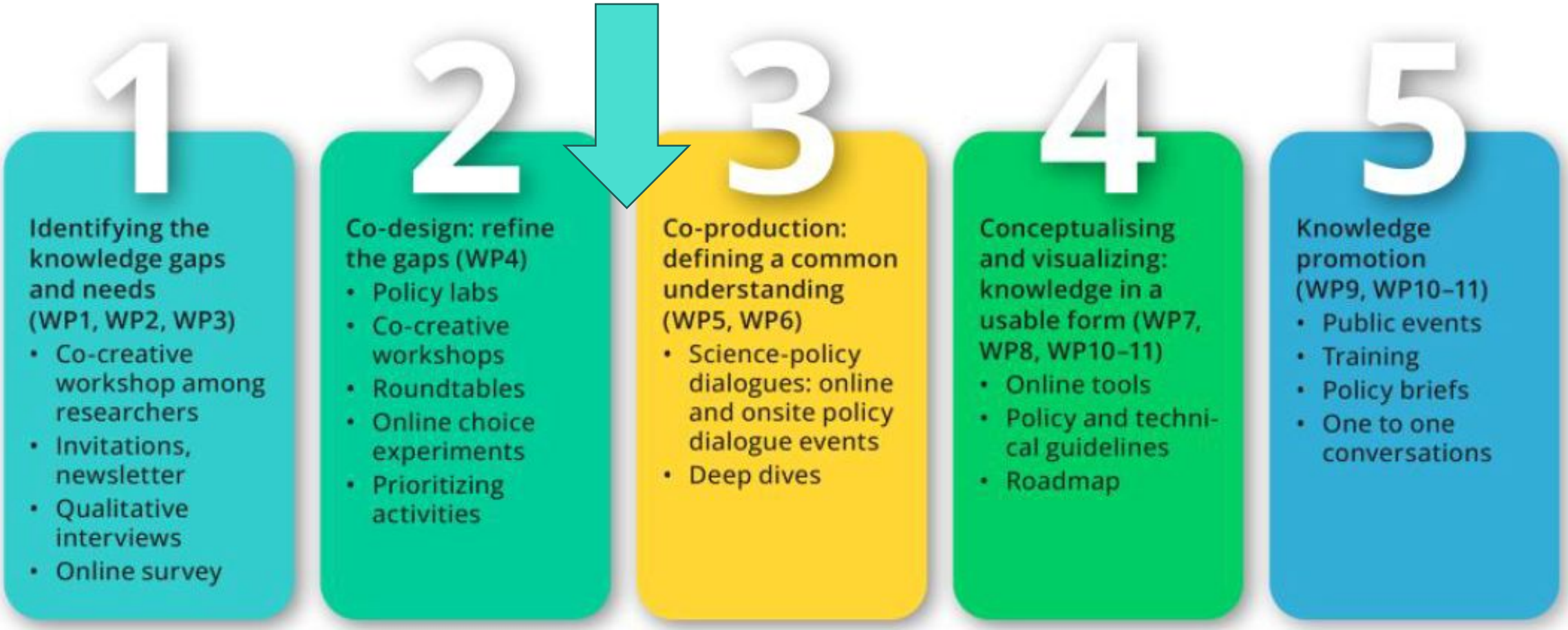
WISE Horizons: 4 years (2023-2026), 2.39 € million funding, 8 organisations

ToBe: 3 years (2023-2026), 2.69€ million funding, 15 organisations

SPES: 3 years (2023-2026), 2.68€ million budget, 12 organisations

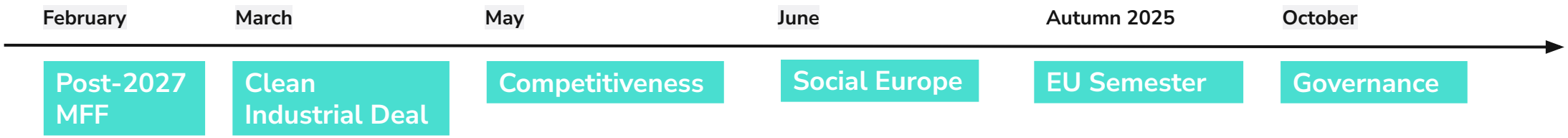
REAL: 6 years (2023-2029), 10€ million budget, two universities

Process of co-production



Deep dives

- As part of the MERGE policy stream, ZOE Institute for Future-fit Economies and the European Policy Centre (EPC) are conducting a series of "deep dives" to analyse the need for a holistic set of metrics to enhance key policies in the European Union (EU).
- **Objective:** to understand the challenges and opportunities of integrating Sustainable and Inclusive wellbeing metrics into different policies.
- **Focus on six (non-legislative and legislative) files:**



Sustainable and inclusive wellbeing

MERGE research shows increasing convergence around three key dimensions:

- **Current Wellbeing** – Ensuring current quality of life (e.g., access to social and affordable housing, quality healthcare and social services, access to childcare and elderly services, work-life balance, mental health support).

- **Future wellbeing (sustainability)** – Securing future wellbeing (e.g.., investment in social infrastructures like education and care system, support young people in transition into adulthood, lifelong learning).

- **Inclusion (Limiting wellbeing inequalities for current and future generations)** – Reducing inequalities (e.g., equal access to education and healthcare services, inclusion of persons with disabilities, reduction of gender inequalities, gender pay gap, address territorial disparities).

Challenges and workshop objectives

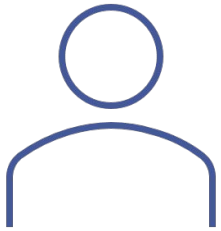
The workshop offers an opportunity not only to assess the extent to which the current Action Plan and Social Scoreboard are underpinned by sustainable and inclusive wellbeing (SIW) but also to look ahead and explore what additional measures are needed to ensure that the revised Action Plan effectively advances a sustainable and inclusive Europe.

Insufficient alignment between the Social Scoreboard indicators and EPSR principles
While the indicators in the Social Scoreboard are organised according to the Pillar's three thematic chapters, namely equal opportunities, fair working conditions, and social protection and inclusion remain substantial gaps, with several principles lacking dedicated or adequate headlines and secondary indicators to effectively track progress and implementation.

Absence of disaggregated data
A lack of disaggregated data, especially by gender, age, ethnicity and other socio-economic characteristics is a further shortcoming of the EPSR and scoreboard

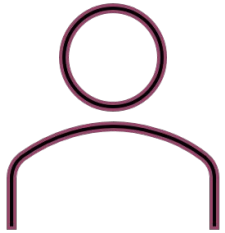
1. What needs to be taken into account in the upcoming review of the European Pillar of Social Rights to further advance sustainable and inclusive wellbeing?
2. How can the use of the Social Scoreboard and its indicators be improved within governance frameworks such as the European Semester and the social convergence framework to better measure progress in implementing the European Pillar of Social Rights and advance sustainable and inclusive wellbeing?

Setting the scene
Impulse statements



Raquel Cortes Herrera

Head of unit, Skills, Jobs & Social Affairs, Secretariat General, European Commission



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MERGE policy deep dive – Social Europe

Setting the scene

Katja Reuter

3 June 2025

Introduction

- Start of this new mandate: key moment to set EU priorities. Primary objective: protect and strengthen people's wellbeing, in line with its aims in the treaties
- But: growing focus on competitiveness. Narrow definition of social aspects in the competitiveness compass on skills development and labour market participation.
- Competitiveness gains: must not come at the cost of Europe's social foundations. Europe cannot be competitive if its people – our biggest resource – are left behind.
- MERGE: investigates policy pathways to a wellbeing economy that defines societal and economic success beyond GDP to delivering shared, sustainable and inclusive wellbeing -
- Protecting people's social rights (health & care, affordable housing, quality jobs, work-life balance, education, affordable quality services and adequate social safety nets): not automatic by-products of a competitive market, but political choices and fundamental investments in our social model and a thriving, resilient and competitive society.
- To achieve that, the EU social dimension and our social compass, the European Pillar of Social Rights must remain front and centre of the EU agenda.

Next EPSR Action Plan

- Revision of EPSR Action Plan: key moment to strengthen the EU social agenda
- Published Social Platform input for the new EPSR Action Plan with key demands for new EU-level initiatives for all three EPSR chapters.
- Upcoming revision of the EPSR Action Plan must
  - comprehensively review existing gaps in the implementation of all 20 principles of the EPSR;
  - deliver new legally binding and non-binding initiatives at EU level, and suggest national level action;
  - fill growing social investment gaps, including through the next Multiannual Financial Framework (MFF)
  - ensure ambitious implementation of existing initiatives.

Some initiatives for chapter 3 Social protection & inclusion

- Ambitious EU anti-poverty strategy: access to Adequate Resources, Quality Services, and Empowerment, Participation and Inclusion, including through a directive on adequate minimum income
- Comprehensive just transition policy framework building on the 2022 Council Recommendation on ensuring a fair transition.
  - Provisions on social protection, access to essential services, civil society participation, adequate financing, support for the social economy, and inclusive policies, including a just transition directive supporting workers in the transition.
- An ambitious European Affordable Housing Plan: aims to eradicate homelessness and support the availability of adequate, quality, accessible, and affordable housing for all;
- Action Plan for Social Services: create an enabling regulatory and financial framework for not- for-profit social service providers that helps develop a resilient ecosystem for social services.

Implementation and policy coherence

- Strengthen the social dimension of the European Semester process – including through more comprehensive social CSRs, a reformed Social Scoreboard that comprehensively monitors EPSR implementation with more and better disaggregated data and a more ambitious Social Convergence Framework.
- Institutionalise social impact assessments to better assess the social impacts of decision-making.
- Promote social investment in the next MFF, including through strengthened cohesion policy and a standalone ESF+ with binding earmarking for social inclusion above the current 25%.
- Need to strengthen structured, regular, transparent and meaningful civil dialogue, including through an ambitious EU civil society strategy.

Thank you for your interest!

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Priorities EPSR

- **Purpose:** Identify priorities for the review of the EPSR

- **Process:** Join in small groups at the tables to discuss:

  - What needs to be considered in the upcoming review of the European Pillar of Social Rights to further advance sustainable and inclusive wellbeing?
  - Ideas thoughts on what must be prioritised in the upcoming review

After, share with the other groups what are your key takeaways.

SIW and the Social Scoreboard

- **Purpose:** To explore ways to enhance the use of the Social Scoreboard to track progress of EPSR principles and promote sustainable and inclusive wellbeing.

- **Process:** Join again in small groups to discuss

- **Guiding Question:** How can the use of the Social Scoreboard and its indicators be improved to better measure progress in implementing the European Pillar of Social Rights and advance sustainable and inclusive wellbeing?

Closing

Next steps

- Follow up interviews
- Follow up event: science policy dialogue (online)
- Will feed into further development of MERGE policy toolbox and case studies

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MERGE

THANK YOU!

mergeproject.eu

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Funded by the European Union

UK Research and Innovation

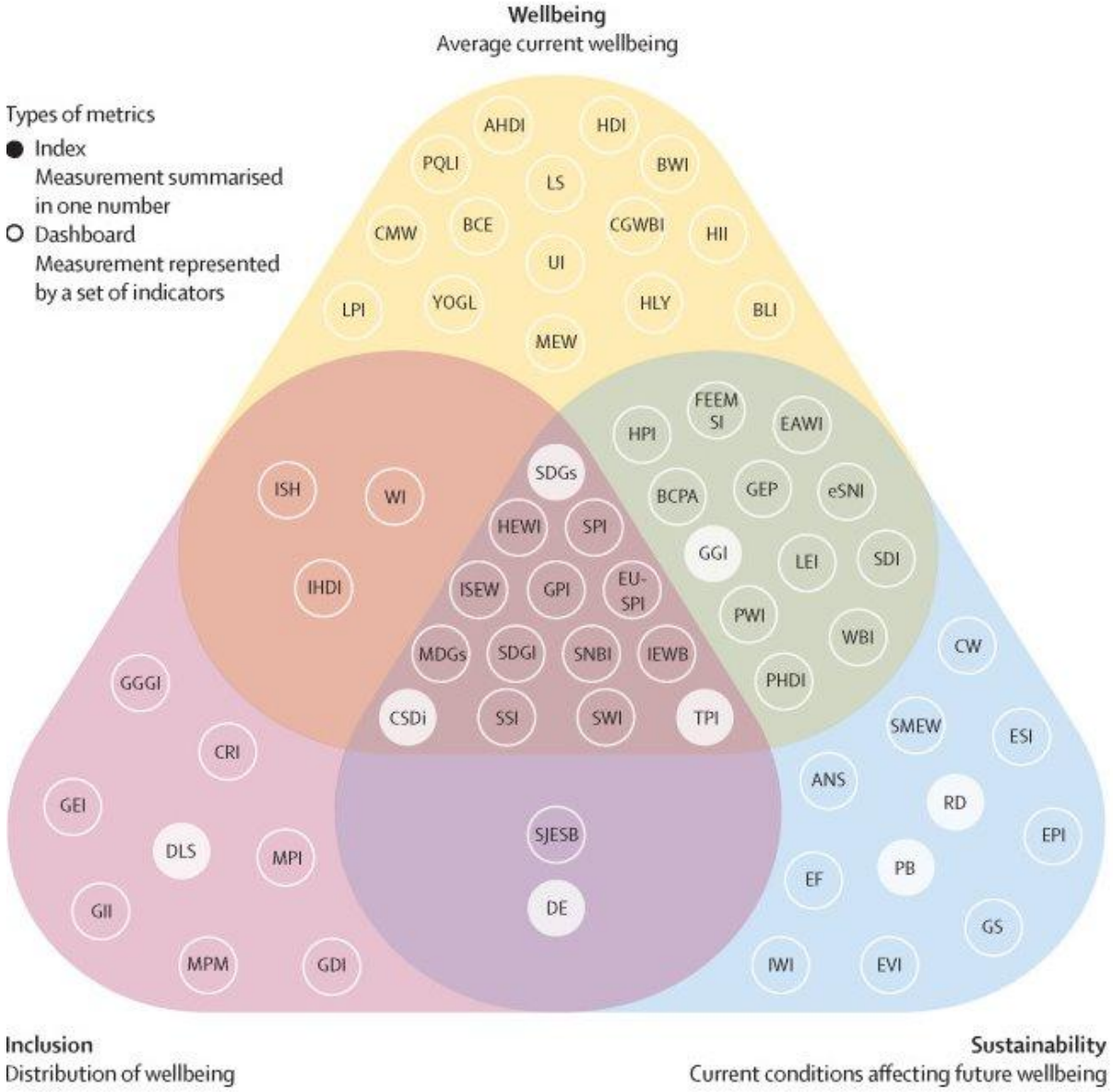

***Table 4**. Thematic domains and the commonalities across wellbeing frameworks.*

UN-ECE	OECD	Common group themes	Themes that related to capitals
(1) Subjective wellbeing	(8) Subjective wellbeing	(1) Subjective wellbeing	
(2) Consumption and income	(1) Income and wealth	(2) Material wellbeing	
(3) Nutrition	(6) Health	(3) Health	
(4) Health	(6) Health	(3) Health	
(5) Labour	(3) Work and job quality	(4) Work and job quality	Human Capital
(6) Education	(5) Knowledge and skills	(5) Knowledge and skills	
(7) Housing	(2) Housing and amenities	(6) Housing	
(8) Leisure	(7) Leisure and culture	(7) Leisure, (8) Culture	
(9) Physical safety	(11) Safety	(9) Safety	
(10) Land and ecosystems	(4) Environmental quality	(10) Land and ecosystems	Natural Capital
(11) Water	(4) Environmental quality	(11) Water	
(12) Air quality	(4) Environmental quality	(12) Air quality	
(13) Climate	(4) Environmental quality	(13) Climate	
(14) Energy resources	(12) Natural capital	(14) Energy resources	
(15) Mineral resources	(12) Natural capital	(15) Mineral resources	
(16) Trust	(9) Social connections	(16) Trust and social connections	Social Capital
(17) Institutions	(10) Voice	(17) Institutions	
(18) Physical capital	(13) Economic capital	(18) Physical capital	Economic Capital
(19) Knowledge capital	(14) Human capital	(19) Knowledge capital	
(20) Financial capital	(13) Economic capital	(20) Financial capital	
	(15) Social capital		

D1.1 Are Beyond-GDP metrics converging? Consolidation of the measurement of sustainable and inclusive wellbeing (2024)

Over the past 50 years, a plethora of “Beyond-GDP” metrics have been proposed to replace or augment the dominant economic indicator Gross Domestic Product (GDP). This report assesses whether there is a trend toward convergence in Beyond-GDP metrics and provides insights into how this trend might be accelerated. The study was conducted on 90 Beyond-GDP metrics and mapped the convergence of different measurement systems in three dimensions: conceptual frameworks, thematic taxonomy and the actual metrics.