



'Mutual learning workshop on access to social protection: data, indicators and monitoring systems'

Thematic Discussion Paper 2

Monitoring access to social protection:
state of play and ideas of possible
progress in data and indicators

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1. Introduction

The present paper aims to serve as a thematic discussion paper for the Mutual learning workshop on 'Access to Social Protection: Data, indicators and monitoring systems', organised on 26 - 27 November 2024 in Brussels. The aim of the workshop is to foster the implementation and monitoring of the 2019 Council Recommendation on access to social protection for workers and the self-employed¹ (hereafter: the Recommendation).

This Mutual Learning Workshop is organised in response to the need for more comprehensive and reliable data at both the national and EU levels, as well as indicators and comparative tools which can serve to inform policy decisions and as such contribute to both inclusive and sustainable social protection systems, in line with Provisions 17 and 18 of the Recommendation. The workshop aims to provide opportunity to discuss and reassess how data and statistics on access to social protection are defined, produced and used, at both the national and EU levels and to exchange best practices between Member States' institutions and other stakeholders. Additionally, it should discuss the challenges and opportunities for improving data collection and monitoring — and therefore policy making — at national level in the short, medium and long run.

This paper briefly discusses gaps in the data necessary for the monitoring of formal as well as effective coverage and adequacy. As such, it aims at assessing the state of play, including listing points of improvement and suggestions, in a non-exhaustive way.

2. Formal coverage

As part of the work on the monitoring framework in 2020, the Indicators Sub-Group (ISG) of Social Protection Committee (SPC) decided to track progress on formal coverage by detailed labour market status or type of employment and by branch of social protection, covering all the branches that fall under the material scope of the Recommendation, with a distinction between mandatory and voluntary coverage. Already in 'version 0' (i.e. the initial version of the framework endorsed end 2020 by the SPC), it was mentioned that ideally, 'the key headline indicator for monitoring formal coverage should be the proportion of workers and self-employed who have formal access to social protection under the different branches'. As this indicator was not available, a two-step approach was followed. The first step aimed at mapping the legal situation by identifying which categories of workers and self-employed are not formally covered in each branch of social protection². The second step aimed to quantify the legal gaps in formal coverage by estimating the size of the groups that were identified as not formally covered in the first step. This second step is crucial to understand the magnitude of potential formal coverage gaps.

A pilot data collection (via the delegates of the SPC-ISG) was launched in 2020 by the European Commission with updates in 2021, 2022 and 2023³. From the start, differences in the data collected by Member States were reported. For instance, some countries collected information by persons, while others collected by contracts or employment status. These different collection methods can lead to 'biases in the comparability of the magnitude

¹ See Council Recommendation of 8 November 2019 on access to social protection for workers and the self-employed 2019/C 387/01, ST/12753/2019/INIT, OJ C 387, 15.11.2019, p. 1–8, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32019H1115%2801%29>.

² Falling under the scope of the Recommendation, i.e.: (a) unemployment benefits; (b) sickness and health care benefits; (c) maternity and equivalent paternity benefits; (d) invalidity benefits; (e) old-age benefits and survivors' benefits; (f) benefits in respect of accidents at work and occupational diseases.

³ European Commission and social Protection Committee (SPC) (2023). Access to social protection for workers and the self-employed (Partial) Update of the monitoring framework -2023, <https://ec.europa.eu/social/BlobServlet?docId=27549&langId=en>

of the persons covered'.⁴ For example, one person may have more than one⁵ and/or a rapidly changing labour market status. Hence, the risk of a mismatch between reported data and the actual number of people covered (or not). Additionally, other gaps in formal data coverage were identified.

Box 1: Examples of data gaps reported by some Member States in 2024

Belgium reports that the fragmented nature of its social security institutions results in fragmented statistics with different definitions and (potentially) different observation units. Also, when combining statistics from different institutions, double-counting cannot be eliminated.

In Latvia, a lack of data in the LabIS data warehouse from some administrations is reported (e.g. on sick leave and economic activity).

Lithuania is working on joining administrative data that could be analysed on both the individual and the household level in order to get a broader perspective and better understand households' situations. Current gaps are related to the quality of the data and the consistency between different information systems in use.

In Poland, the Social Insurance Institution (ZUS) does not have data on the income obtained from the performance of non-contributory 'contracts for specific work'.

(Pre-workshop survey, 2024)

2.1. Data gaps in the mapping of the legal situation

Remaining challenges

Regarding 'the legal mapping', significant progress has been made in recent years, as evidenced by the evolution of the tables (and their accompanying notes) in the Partial Updates since Version0.

Box 2: Comparing gaps in formal coverage by social protection across EU Member States

The mapping is based on a yes/no indicator of formal coverage. Since the data collection for the 2021 Update of the monitoring framework, Member States are invited to add footnotes when specific situations do not fully match a binary yes/no indicator and encouraged to focus on the functions of schemes as defined in Version0 rather than just relying on the national labels given to the schemes. In the case of multi-layered systems, the Member States are encouraged to report on the gaps in the main schemes falling into the scope of the Recommendation, regardless of whether they are public or occupational, and to report the situation for top-up schemes even if the group is already covered with a basic scheme⁶. Regarding the self-employed, Member states are encouraged to refer to the specific mapping in the report for the Commission from 2020 by Avlijas.⁷

⁴ European Commission (Directorate-General for Employment, Social Affairs and Inclusion) (2020). Access to social protection for workers and the self-employed: Version 0 of the monitoring framework, Luxembourg.

⁵ For instance both work as an employee covered by an employment contract and perform other economic activities as a self-employed worker or work for more than one employer under different employment contracts

⁶ Cf. European Commission (2021). Council Recommendation on Access to social protection Monitoring framework - Guidance for the 2021 update of data on formal coverage, p. 9.

⁷ Avlijas S. (2020) Comparing Social Protection Schemes for the Self-employed across EU-27 Focus on sickness, accidents at work and occupational diseases, and unemployment benefits – report for the European Commission's Social situation Monitor, <https://ec.europa.eu/social/BlobServlet?docId=23364&langId=en>

The mapping of the branches seems to have raised fewer issues in comparison with the mapping of labour market status. As a result, the 2021 update addressed issues related to 'students performing internships'⁸, some special cases⁹, while the category 'casual workers' was extended to also include 'simplified, short-term fixed contracts'. Regarding the measurement unit, it was recognised that in most cases the data collected refers to the number of persons working (at a reference time point) with a status that does not provide coverage for a specific branch (rather than the number of persons which are not covered by a given branch)¹⁰.

As the aim of the mapping was to identify gaps in social protection for different segments of the workforce, some issues encountered in this first step remained unresolved. For instance, data on the formal coverage of atypical groups of workers who do not fit properly in the typical dichotomy of 'employees / self-employed', such as platform workers, artists or researchers under grant contracts, is incomplete and still proves hard to collect. For some groups, even their size (i.e. the number of workers involved) is mostly unknown (e.g. platform workers in most Member States, despite some data being readily available in digital formats with the platforms concerned or through estimations by EU institutions¹¹).

Moreover, the availability of breakdowns (not only by employment relationships but also) by other characteristics, —such as full-time versus part-time or temporary versus open-ended types of employment— often vary among Member States. The reasons being that such data is not processed by the relevant administrations and therefore not available in national databases (with the exception of age and gender in most cases).¹²

Box 3: Availability of data at national level (given the call in the Council Recommendation to collect and publish reliable national statistics on access to the various forms of social protection)

In 2021, ISG delegates from 20 Member States (AT, BE, CZ, DE, EE, ES, FI, HR, HU, IE, IT, LT, LV, MT, PL, PT, RO, SE, SI and SK) responded to a short survey mapping national practices in collecting and publishing statistics on access to social protection. The aim of the survey was to summarise the efforts needed to fulfil provision n°17 of the Council Recommendation (i.e. to “collect and publish, where possible, reliable national statistics on access to the various forms of social protection, for example broken down by labour market status (self-employed/employee), type of employment relationship (temporary or permanent, part-time or full-time, new forms of work or standard employment), gender and age”).

All Member States that answered the questionnaire reported having administrative data on access to social protection, mostly from sources such as social security institutions, and to a lesser extent, other national administrations such as employment offices and Ministries. Only a few Member states mentioned surveys (such as LFS) as a relevant source, highlighting their limitations due to small sample size for self-employed. In some cases, the national statistical offices (AT, BE, HU, MT, PT, RO, SI) play a role, mainly in publishing

⁸ It was decided social protection coverage should be monitored only for those who can be considered workers, i.e. they are remunerated for a “genuine and effective” activity (European Commission (Directorate-General for Employment, Social Affairs and Inclusion) (2020).

⁹ For instance when other branches can (partially) cover a certain risk; residence-based insurance against certain risks.

¹⁰ European Commission (2021). National statistics on access to social protection— main results of the short survey on mapping national practices, SPC/ISG/2021/10/2, p. 6-7.

¹¹ Estimates have been made available in the context of the Proposal for a Directive on improving working conditions in platform work, see in its accompanying Impact Assessment Report and in the JRC COLLEEM surveys of digital labour platforms. For the Impact Assessment, see: European Commission (2021) Commission Staff Working Document: Impact Assessment Report accompanying the document Proposal for a Directive of the European Parliament and of the Council On improving working conditions in platform work, SWD/2021/396 final, [https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52021SC0396\(01\)](https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52021SC0396(01)) For the JRC Colleem surveys, see: https://joint-research-centre.ec.europa.eu/scientific-activities-z/employment/platform-work_en.

¹² European Commission (2021). National statistics on access to social protection— main results of the short survey on mapping national practices, SPC/ISG/2021/10/2, p. 3.

statistics based on administrative information rather than data collection. Update frequencies vary from monthly to yearly, depending on the sources and/or type of data.

Among the data most relevant to access to social protection reported were data about affiliation (number of persons insured and/or paying contributions in both mandatory and voluntary schemes) and data on the number of employees, self-employed and persons in various types of employment relationships.

*The availability of data broken down by employment relationships varied among the reporting Member States. While most provided the distinction between employees and self-employed, fewer offered distinctions among full time, temporary and open-ended employment contracts. Several Member States mentioned that information collected in an administrative context excludes variables that are not directly relevant for the administration responsible for data collection. As a result, additional breakdowns are often unavailable. Regarding standard **versus** new forms of work, some data was available, primarily on mostly the number of non-standard contracts such as in AT, BE and SK. However, this breakdown is not commonly found in national databases despite Provision 17 of the Recommendation explicitly referring to this distinction.*

Finally, the approach of collecting data for the legal mapping through ISG delegates may lead to instances of under-reporting and a lack of detail. For example, some of the legal tables report 'some groups of non-standard workers' or 'some groups of self-employed' as lacking coverage (or having only voluntary coverage) without specifying which sub-groups are referred to. Moreover, in the table on lack of coverage for non-standard workers, the difference between the first column ('Casual workers or simplified, short-term fixed contract') and the last one ('National specificities') could be clearer.¹³ In that respect, amendments of the questionnaire addressed to the Member States for an improved data collection are on the agenda and open for discussion.

Potential solutions

In March 2024, the Commission proposed to the SPC-ISG possible avenues to address some of the issues identified. A *first possibility* is to further clarify concepts and deepen the interpretation of the legal situation, for instance when formal access is only available to residence-based schemes, when Member States' main scheme(s) provide only basic insurance while more substantial income support is provided by top-up schemes, and when a given risk is not covered by a specific branch but (partly) by other branches (The typical example being when there is no specific insurance for accidents at work but the risk is (at least partly) covered by healthcare, sickness and invalidity benefits). According to the Commission's note, complementing the existing methodology with additional guidance about social protection branches, labour market statuses, formal coverage and voluntary coverage could improve consistency of the reporting.

A *second avenue* debated to enhance the legal mapping is further research on formal coverage for the groups less likely to be covered by social protection (cf. supra: domestic workers, seasonal workers, platform workers, artists or researchers under grant contract), and for which it may not be possible to report on their specific situation on a regular basis. In such cases, one could opt to devote 'specific attention to them outside the tables on formal coverage'.

As a *third option*, and as an alternative for the annual ad-hoc questionnaires targeting ISG delegates, the Commission considered relying, 'at least partly' on the MISSOC's comparative tables 'in order to derive reliable and regularly updated information about gaps in formal coverage (or voluntary coverage) affecting non-standard workers and the self-

¹³ European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4, p.6.

employed, for the various branches of social security'. This approach could save resources, reduce the administrative burden, and ensure more consistency and transparency about the sources of information used to produce the indicators in the monitoring framework. However, EU Member States' social protection schemes often prove too complex and diverse, especially for atypical forms of work,¹⁴ for the present state of MISSOC's data collection. Hence, adaptations of data collection need to be made for this suggestion to be viable. Such adaptations to MISSOC guidelines are on the agenda and open for discussion.

2.2. Data gaps in the quantification of the legal gaps in formal coverage

Remaining challenges

Regarding the quantification of the legal gaps in formal coverage (step 2), it can be observed that throughout the years, more and more Member States reported quantitative data to the Commission.¹⁵ During the third data collection on formal coverage of Spring 2023, most (but not all) Member States in which gaps exist, provided (i) statistics about the number of non-standard workers and self-employed groups not covered by social protection schemes and/or (ii) estimates about the number of people subject to voluntary access or respective take up rates.¹⁶ However, it was observed that 'despite progress in the quality of the data reported, some limitations in estimates remain', 'as some countries could not report data for all the categories indicated as 'not covered' in the table, or on the take-up of voluntary schemes (either numbers or rate)'. Finally, the update highlighted that expressing data in relative terms, such as coverage and take-up rates, would allow more meaningful comparisons across countries. This issue has been addressed for most Member States, as illustrated in the tables below.

Tables 1 and 2 below summarise the capacity of Member States to quantify the gaps in formal coverage (in the SPC-ISG data collection, dating from 2023).

¹⁴ Reference is made to the non-coverage of casual and seasonal workers for many branches in Romania presently not being reflected in the MISSOC tables, which is also the case for Hungary (short-term employment contracts) and Poland (civil law contracts) while limited and fragmented information is provided about the coverage of non-standard workers in Czechia (only for some branches). In the case of Germany, the exclusion of 'mini-jobbers' is only mentioned in the General Principles part of the table, while missing from the specific branch tables (European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4, p. 9).

¹⁵ The Commission received replies from 22 Member States for the pilot data collection that took place in 2020 (Version0, p. 35) and of almost all Member States in 2023 (Partial Update 2023, p. 7).

¹⁶ European Commission (DG EMPL) and social Protection Committee (SPC) (2023). Access to social protection for workers and the self-employed (Partial) Update of the monitoring framework -2023, <https://ec.europa.eu/social/BlobServlet?docId=27549&langId=en>

Table 1 - Quantifying lack of formal coverage (for either non-standard workers or self-employed)

Situation	Non-standard workers	Self-employed
No gaps in formal coverage – <i>therefore nothing to quantify</i>	BE, BG, CY, EE, ES, FI, HR, IE, LT, MT, SE, SK	AT, DK, ES, FI, HR, HU, LU, SE and SI
All or most gaps in formal coverage are quantified	AT, DE, EL*, FR*, IT, LV, LU, PL, SI	BE, BG, CY, CZ, EL, EE, FR, IE, IT, LT, LV*, MT, NL, PL, RO and SK
Only some of the gaps in formal coverage are quantified	HU, PT, RO	
No quantification provided	CZ, DK, NL	DE, PT

*without estimates of non-coverage rate (only absolute numbers)

Table 2 - Quantifying take up rate for voluntary schemes (for either non-standard workers or self-employed)

Situation	Non-standard workers	Self-employed
No voluntary coverage and <i>therefore no take up rate to estimate</i>	BE, BG, CY, EE, EL, ES, FR, HR, HU, IE, IT, LT, MT, NL, SI	CY, HR, HU, IE, IT, LV, MT, PT, SI
Take-up of all or most voluntary schemes quantified	AT, CZ*, SK	BE, BG, CZ, EL*, ES, FR*, LT, NL, PL, SK
Take-up of only some of the voluntary schemes is quantified	DE, PL, PT*	AT, DE, FI**
No quantification of the take-up of voluntary schemes provided	DK**, FI**, SE**, LV, LU, RO	DK, EE, LU, RO, SE**

*without estimates of take-up rate (only absolute numbers) ** voluntary coverage may apply only to top up scheme

Source: European Commission, DG EMPL, Elaboration based on the [2023 update](#) of the Monitoring framework (Chapter 1 on formal coverage, Tables 1.1 to 1.6)

Despite reported progress, the Spring 2023 data collection revealed there was still limited quantitative data in a number of cases regarding the lack of formal coverage, with no coverage rate estimations for around 33% of the cases. Even more gaps were identified for voluntary coverage, with no take-up rate estimations in 55% of the cases. Another important issue is the lack of comparability of the data. This issue arises because Member States report mostly using national administrative data which is based on different sources and uses different definitions, concepts and reference periods. As a result, estimating gaps at aggregated EU level has proved problematic.

Furthermore, and as briefly mentioned before, in many cases the reported data is related to the number of contracts rather than the number of individuals lacking formal access. While closely connected, these numbers are not necessarily equivalent (e.g. due to persons

holding multiple employment contracts¹⁷) and the data reported does not allow to measure how many persons are left without coverage (though some Member States do attempt to make these calculations).¹⁸ Also, in general, merely stating that a *certain number of persons* are not covered by a scheme may not be sufficiently accurate if this lack of coverage is solely determined by the lack of coverage for a certain activity. Such method might overlook the actual coverage situation of the many persons, as access might be covered by other means (for instance, if person combines salaried and self-employment).

Last but not least, the lack of harmonised and consistent definitions of 'employee', 'worker', 'non-standard worker', 'self-employment', etc. remains an obstacle for the production of comparable statistics, as definitions vary between Member States.¹⁹ Data comparability is often not achieved, indicating the importance of metadata stipulating data limitations due to the differences in counted concepts. Sometimes, data collected at EU level, notably EU-LFS is used. However, survey data has its limitations such as limited sample sizes for certain atypical types of work (resulting in data that might not be statistically unsound) or differences between definitions used in Member States' legal concepts.

Potential solutions

Currently, the conclusion remains that quantifying gaps in formal coverage relies mainly, if not solely, on national (mostly administrative) data collected through the SPC-ISG delegates.²⁰ While giant leaps in the field of the collection and processing of administrative data in all Member States are at present not feasible, some steps can be taken in the short term in order to improve the quality of the quantification of the gaps in formal coverage. In this field, for instance, further clarifications of concepts regarding the quantification of the gaps were suggested as a way to improve comparability and consistency of the reported data, particularly concerning the measurement unit (contracts/status versus number of persons). It was suggested that cases where Member States manage to estimate the number of persons not covered could be highlighted, and the feasibility of replicating such cases in other Member States could be tested. This exercise could be done in parallel with work on improving MISSOC tables and in alignment with further developments of the legal tables. Furthermore, listing the existing definitions used at national level, particularly regarding labour market status, and map issues of comparability could be useful for reflecting on possibilities of streamlining them in the future. It was also noted that the presentation of the tables could be improved with a more systematic indication of national sources used. This should result in additional guidance regarding the main concepts used for the data collection and quantification of the gaps on formal coverage.

A second avenue, which would probably be feasible only in the mid-or long term, would comprise of further reliance on administrative data and supporting the progressive development thereof in the area of formal coverage. The note for discussion at the Informal EPSCO Council in Namur in January 2024 suggested relying more systematically on administrative data.²¹ The option of putting together an EU database/data-space gathering existing national data on access to social protection was also discussed. As the

¹⁷ The data may also misidentify the status of non-standard workers with marginal labour market attachment, who may have formal access to social protection through a co-insurance scheme or a job that they are holding during a time outside of the data collection period.

¹⁸ European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4, p. 7.

¹⁹ Said definitions can also differ within Member States, notably differences can oftentimes be found between civil law, labour law, social security and fiscal legislative frameworks. In some cases, definitions used might differ between administrations within the same legislative framework.

²⁰ European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4, p. 10.

²¹ Belgium Presidency Note, Informal EPSCO - Namur, January 11th, *Making our social model future-proof : Social protection and SURE*: "In order to engage in mutual learnings in a good way, a joint effort can be made to enhance the current monitoring framework of the Recommendation, by developing improved qualitative and quantitative indicators, covering areas for which indicators are currently lacking and making better use of administrative and register data. This would allow to estimate more accurately what are the most pressing gaps and which countries are performing well".

Commission notes, at this stage, this seems a very long-term objective. Nevertheless, when considering a possible “EU Data Space” on social protection, some practices already in place in some Member States could serve as an inspiration, providing both good practices and lessons learned.

Box 4: Inspiring developments in data production and exchanges in selected EU Member States

In Finland, data configurations are taken into account already during the legislative process, importing the reporting systems' capacities.²²

In Belgium, in 1992, the [Belgian Crossroads Bank for Social Security](#) was established, allowing for the automatic exchange of data on social protection with respect for data ownership, and with data quality in mind. At that time, state-of-the-art and ahead of its time, it has privacy-by-design and administrative simplification at its core, with a key concept being interoperability of data. The Labour Market and Social Protection Datawarehouse (DWH MT&PS) relies heavily on (the principles of the) CBSS. The purpose of the Datawarehouse is 'to aggregate socio-economic data from Belgian social security institutions and other public bodies. The aim of the [Labour Market and Social Protection Datawarehouse](#) is to be able to respond more accurately, more quickly and more cheaply to requests for data from research institutes and authorities.

Portugal's [National Data Strategy](#) aligns with the European Data Strategy. It aims to create a secure and accessible data ecosystem and focuses on enhancing data quality and interoperability, which is crucial for reliable data collection in social protection. The strategy emphasises the importance of open data and the reuse of public sector information, facilitated through the open data portal, which provides access to a wide range of data from various public bodies. Furthermore, the strategy focuses on ensuring interoperability and secure data sharing across different sectors, crucial for creating new services and products, both within Portugal and across borders.

Regardless of any long-term objectives, the monitoring framework would benefit from a joint process of mapping at a detailed level existing administrative data needs at national level. Mutual Learning Events and SPC-ISG meetings should provide for a fruitful forum to discuss the possibilities of incorporating such exercises in next rounds of data collection and in the next iteration of the monitoring framework.

3. Effective coverage and adequacy

Effective coverage and adequacy are separated but intertwined dimensions of the Recommendation. However, from a methodological perspective, the data sources available to monitor effective coverage and adequacy are in many cases the same.²³ Hence, challenges and opportunities regarding the monitoring thereof are addressed together in this section.

As a preliminary remark, it should be noted that also for the monitoring of effective and adequate coverage, administrative data is too often unavailable, and when available, frequently lacks comparability. As a result, the indicators used for the monitoring are based on data from the EU-SILC and EU-LFS surveys – and this is mostly what the section below is about.

²² Oksa, S. (2021). Finland's national data access to social protection, presentation at the ISG meeting of 22 October 2021.

²³ European Commission (2020). Access to social protection for workers and the self-employed - Version 0 of the monitoring framework, <https://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=8358&furtherPubs=yes>

As discussed below, challenges regarding the monitoring of effective and adequate coverage mainly relate to technical issues on the one hand, and conceptual challenges on the other.²⁴

3.1. Technical issues with the current monitoring of effective coverage and adequacy

A first technical issue is that the indicator 'AROP of quasi-jobless households versus other households (for the group age 16-64)', introduced in 2021, reflects the extent to which persons living in households with very low work intensity escape monetary or non-monetary poverty. However, this indicator cannot be broken down by most frequent activity status (i.e. Employees, employees with permanent contract, employees with temporary contract, employees or self-employed working full time, employee or self-employed working part time, self-employed, unemployed, economically inactive persons, excluding retired), unlike other indicators.

A second technical issue relates to a change made for the 2023 partial update of the indicators regarding the reference period for measuring the most frequent activity status. As the breakdown between permanent and temporary contracts among employees can only be measured during the interview period, while other variables (e.g. For instance activity status, status of employees or self-employed, working time) can be measured during the income reference year (i.e., to be aligned with the reference period of the income and poverty indicators), the EU-SILC based indicators for effective coverage and adequacy must be presented in distinct tables : on the one hand permanent versus temporary contract (based on interview period) and on the other all other breakdowns (activity status, employees vs self-employed, working time) based on income reference year. It also means that the aggregated categories "persons in standard versus non-standard employment" are not measured at the same reference periods, and therefore they are not presented anymore.

Other technical issues are related to statistical concepts such as, for instance, reliability.

Box 5: Issues with regards to statistical reliability and confidence

Dissemination: the category 'family workers' was removed from the final tables as it is statistically reliable only in a few Member States.

Breakdown by gender: Indicators can be broken down by gender – however, for many cells in the tables the confidence intervals are wide.

Breakdown by age: similarly to breakdown by gender, for many cells in the tables the confidence intervals are wide and therefore very broad age groups need to be used to keep most of the values statistically reliable.

Moreover, the indicators broken down with these variables should be interpreted cautiously as they are descriptive statistics, i.e., unadjusted for other individual characteristics.

(European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4, p. 15).

²⁴ European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4, p. 18.

Sensitivity tests revealed further issues.²⁵ Firstly, the scope of the 'social benefits' considered for the first adequacy indicator²⁶ are the benefits received at individual level, while those received at household level are excluded. While this is aimed at proxying the scope of the Council Recommendation (i.e. with a focus on rather contributory benefits), this can lead to comparability issues as some Member States have various levels of individualisation of their social protection schemes. Secondly, the fact that people can have more than one labour market status, as well as changes in their labour market statuses during the reference year, often affects the values of the indicators and their interpretation (i.e. for persons having been unemployed for less than six months in particular). Given the drawbacks of the approach tested by Antón and Grande, a potential solution in the short term could be to add the category of those who spent at least one month as unemployed during the income reference year as a complementary information to the EU-SILC based indicators' tables already agreed upon. During 2024, the SPC-ISG agreed that this approach should be applied in future updates of the monitoring framework.

Finally, as already commented upon in Version 0 of the monitoring framework, the measurement of income among the self-employed is challenging, especially considering that in a few EU Member States a sizeable group of self-employed produce for own consumption. As a result of the conceptual and practical difficulties of measuring the income of the self-employed, 'the analysis of EU-aggregate AROP rate and comparisons across Member States require caution'.²⁷

3.2. Conceptual challenges for the current indicators of effective coverage and adequacy

Besides these technical issues with the current EU-SILC based indicators, there are several conceptual challenges that must be considered as well. First, the existing indicators do not capture reciprocity or adequacy of social benefits after a risk occurs, nor the difference thereof in relation to the previous status in employment or type of contract. As a result, those indicators remain imperfect proxies of what one would want ideally to measure.

A second conceptual challenge is the gap between monitoring adequacy by proxy of monitoring deprivation and poverty, and the impact of social transfers on these issues. The Recommendation, however, relates 'an adequate level of protection' also to "maintaining a decent standard of living and providing appropriate income replacement"²⁸, a dimension currently not covered by existing agreed indicators.

²⁵ For an elaboration on the results of various sensitivity tests, cf. European Commission, Joint Research Centre, Antón, J., Grande, R., Monitoring the effective coverage and adequacy of social protection in the EU – Development and update of the monitoring framework of the Council recommendation on access to social protection, 2022, <https://data.europa.eu/doi/10.2760/714939>

²⁶ Reciprocity rate among those at risk of poverty before social transfers, cf. European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4.

²⁷ European Commission (DG EMPL) and social Protection Committee (SPC) (2022). Access to social protection for workers and the self-employed (Partial) Update of the monitoring framework - 2022, <https://ec.europa.eu/social/BlobServlet?docId=26987&langId=en>; European Commission (DG EMPL) and social Protection Committee (SPC) (2023). Access to social protection for workers and the self-employed (Partial) Update of the monitoring framework - 2023, <https://ec.europa.eu/social/BlobServlet?docId=27549&langId=en>; and: Schoukens, P., Spasova, S., De Becker, E., Haapanala, H., & Marengo, M. (2024). Improving Access to Social Protection in the European Union: a proposal for further action. OSE Paper Series, Research Paper No. 64, https://www.ose.be/sites/default/files/publications/2024_OseResearchPaper64_Schoukens_Spasova_Et_Al.pdf, p.30 who point out that, even if data collection were harmonised, 'self-reported income alone is not a reliable indicator of the adequacy of social protection for the self-employed, as these workers often have incentives to under-report their true earnings or under-contribute to social protection systems'.

²⁸ European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4, p. 18; Provision 11 of Council Recommendation of 8 November 2019 on access to social protection for workers and the self-employed, 2019/C 387/01, ST/12753/2019/INIT, OJ C 387, 15.11.2019, p.1–8, [https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32019H1115\(01\)](https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32019H1115(01))

3.3. Other challenges regarding the availability of (administrative) data

Regarding the monitoring of effective coverage specifically, the EU-SILC based indicator on effective coverage considers all social benefits received at individual level. Monitoring more granularly, e.g. breakdown of benefits per branches of social security, would thus require to rather use administrative data which however is not always (sufficiently) available.

Another challenge is linked to the LFS-based indicator on effective coverage. The indicator only captures registered unemployed, potentially turning registration into an intermediating factor. Furthermore, in most EU Member States, information on the receiving of unemployment protection and registration with public employment services is self-declared, raising data-quality concerns. Last but not least, the indicator is unavailable or unreliable in a small number of Member States.

Finally, the monitoring of effective coverage requires monitoring eligibility rules in force. Eligibility rules, however, can be very complicated, including many qualifiers, making it often difficult to decide which rule should be retained for a given Member State and reference period. Furthermore, indicators based on the mapping of eligibility rules, only reflect the rules in place and not the implementation in practice. This approach disregards potential administrative or other barriers that could result in the non-take up of social protection rights,²⁹ a widely recognised issue in contemporary welfare states their poverty-reducing capacity.³⁰

3.4. Potential solutions

Potential solutions for improving and extending indicators of effective coverage

A potential solution to address challenges with regard to reciprocity of social benefits is to test the feasibility of the use of longitudinal data available in EU-SILC, including looking into the possibility of tackling issues with regard to sample sizes by pooling data of several years in order to reach statistically reliable data. 'Moreover, one could review all EU-SILC variables to verify if the occurrence of risks beyond unemployment and retirement can be measured and whether a relevant link can be made with the related social benefits covered in EU-SILC'.³¹ For reciprocity of unemployment benefits specifically, 'the existing agreed indicator does not include information on the previous labour market situation before unemployment. As a result, the existing indicator does not reveal how former temporary contract workers or self-employed fare in terms of reciprocity of unemployment benefits/assistance compared to former full-time permanent contract employees. It was also proposed to test the feasibility of using longitudinal data to measure if reciprocity of benefits by unemployed persons in a given reference period is influenced by the labour market situation one quarter or one year before and if so, how. Additionally, it was suggested to

²⁹ European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4, p. 20.

³⁰ Janssens, J., & Van Mechelen, N. (2022). To take or not to take? An overview of the factors contributing to the non-take-up of public provisions. *European Journal of Social Security*, 24(2), p. 95-96. Also see: Goedemé, T., & Janssens, J. (2020). The concept and measurement of non-take-up. An overview, with a focus on the non-take-up of social benefits. Deliverable 9.2 Leuven, InGRID-2 project 730998 H; and: Marc, C., Portela, M., Hannafi, C., Le Gall, R., Rode, A., & Laguérodié, S. (2022). *Non-take-up of minimum social benefits: quantification in Europe* (Doctoral dissertation, Direction de la recherche des études, de l'évaluation et des statistiques (DREES) Ministère de l'Emploi et de la Solidarité).

³¹ European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4, p. 21.

make more use of the EU-LFS variables that allow to estimate the occurrence of specific risks.³²

Antón and Grande pointed out that administrative data on reciprocity of social security benefits would allow for more precise and reliable information, detailed by social security branch. As they state, 'it is debatable to what extent one can monitor the effective coverage and adequacy of social protection based on household surveys sometimes subject to size limitations when the role of registers becomes more and more relevant in modern research'.³³ However, the use of administrative data comes with challenges of its own. For instance, differences in the availability of administrative data across EU Member States as well as diversity of the definitions and concepts used: "as the authors point out, in order to put together comparative tables based on administrative data, attention would need to be paid to a systematic and structured method of data collection and standardised definitions. Furthermore, and contrary to household surveys, administrative data often include only basic characteristics of individuals."³⁴

Moreover, 'administrative data often relate only to the number of recipients of social security benefits. Without an estimation of the potentially eligible population, it is not possible to measure the extent to which workers and self-employed have access to benefits when a risk materialises. Given the current challenges regarding availability and diversity, relying on administrative data can only be envisaged in a long-term perspective.

It was therefore proposed to start by: '(1) mapping existing international databases making use of administrative data about reciprocity of social security benefits and their potential developments in the future; and (2) collecting information about existing national administrative data in EU Member States regarding reciprocity of social security benefits. The latter would benefit from the sharing of information, for instance through mutual learning activities, gathering ISG delegates and other relevant actors'.

Another potential way to address these challenges relies on existing information about the rules governing social security entitlements such as qualifying and waiting periods, for the development of indicators about coverage based on the theoretical replacement rates for the various social security branches. This method would be de facto included in the Commission proposal to build on EUROMOD HHoT to address challenges regarding the monitoring of adequacy (see below).

Potential solutions for improving and extending indicators of adequacy

For the improvement and extension of indicators of adequacy, two proposals have been put forward.³⁵ Firstly, testing the feasibility of using EU-SILC longitudinal data in order to measure the impact of the previous activity status on both reciprocity of benefits as well as on the contribution of social benefits in replacing income and on reducing monetary poverty. Secondly, the development of a two-step approach, based on the EUROMOD HHoT model,³⁶ which would include as a first step, the development of theoretical replacement

³² European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4, p. 21, with the remark that 'it will not be possible to link those to reciprocity of other benefits than unemployment (i.e., the LFS only measures reciprocity of unemployment benefits)' (op. cit.).

³³ European Commission, Joint Research Centre, Antón, J., Grande, R., Monitoring the effective coverage and adequacy of social protection in the EU – Development and update of the monitoring framework of the Council recommendation on access to social protection, 2022, <https://data.europa.eu/doi/10.2760/714939>

³⁴ European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4

³⁵ European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4,. Cf. supra for potential limitations of the use of such use of longitudinal data.

³⁶ De Becker E., (2023) Social Security and the Combat of In-Work Poverty, in Ratti L., Schoukens, P. (eds.) Working Yet Poor: Challenges to EU social citizenship, Hart Publishing; and: De Becker, E. (2024). The principle of adequate social protection in the European Pillar of Social Rights: Assessing the instruments used to realise its potential. European Journal of Social Security, 13882627241254613. The method was also mentioned by Schoukens et al. (see: Schoukens, P., Spasova, S., De Becker, E., Haapanala, H., & Marengo, M. (2024). Improving Access to Social Protection in the

rates for hypothetical cases, and as a second step, would compare the net income for selected hypothetical cases with the poverty threshold in a given country and moment in time³⁷.

Box 6: Potential added value of EUROMOD to simulate the adequacy of social protection

EUROMOD, developed by the Joint Research Centre, is the tax-benefit microsimulation model for the European Union that enables researchers and policy analysts to calculate the effects of taxes and benefits on household incomes and work incentives for the population of each Member State and for the EU as a whole.

The Hypothetical Household Tool (HHoT) is a plugin for EUROMOD that allows for the creation of hypothetical households and the generation of corresponding data based on selected household characteristics.

Tax-benefit microsimulations using EUROMOD allow researchers to produce simulations of the outcomes of various adjustments to social protection schemes.

This type of analysis is considered by some a promising avenue for the analysis of effective coverage and adequacy, for instance in forecasting the effects of national reforms to social protection systems and for assessing the adequacy of benefits for representative household units or vulnerable groups (e.g., quasi-jobless households).

While input data for EUROMOD is derived from EU-SILC (therefore suffering from its limitations e.g. when estimating coverage for very small sub-groups of non-standard or self-employed workers), the use of hypothetical data generated with the HHoT tool for overcoming said limitations is subject to ongoing research.

Inspiration can also be found looking into methods used by international organisations. Already in Version 0 mention was made of the method used for analysing the adequacy of benefits by looking at the replacement rates of maternity benefits and of benefits related to employment occupational injury, disability and old-age by the ILO.³⁸

European Union: a proposal for further action. OSE Paper Series, Research Paper No. 64, https://www.ose.be/sites/default/files/publications/2024_OseResearchPaper64_Schoukens_Spasova_Et_Al.pdf, p. 32 et seq.).

³⁷ European Commission (2024). Monitoring framework on access to social protection - Discussion note, SPC/ISG/2024/03/4.

³⁸ ILO (2024). World Social Protection Report 2024–26 - Measuring social protection coverage and expenditure, International Labour Office, Geneva, <https://www.ilo.org/publications/flagship-reports/world-social-protection-report-2024-26-universal-social-protection-climate>

4. Conclusions

Remarkable progress has been made in the monitoring of access to social protection in the EU since the Council Recommendation on access to social protection for workers and the self-employed. Both the Covid-19 pandemic and the cost-of-living crisis that almost immediately followed the Recommendation have proven the importance of access to social protection in times of crisis, underscoring the relevance of its accurate monitoring

In spite of the efforts made by all stakeholders concerned, the monitoring of access to social protection, a pivotal element of the Recommendation and of social protection in general, is still facing challenges. Different solutions have been either implemented, put forward or suggested. Difficulties still arise for instance in capturing the complexity of EU Member States' social protection schemes, monitoring access to social protection of non-standard forms of employment and among the self-employed, as well as in the case of both rapidly changing or combinations of different labour market statuses. Moreover, monitoring at individual or household level still proves difficult in too many cases, as is capturing the income of self-employed.

Most difficulties are mainly due to the insufficient availability of administrative data and/or its lack of comparability.³⁹ However, reliance on surveys and models has drawbacks of its own.⁴⁰ Moreover, an essential drawback of the development of (indicators based on) surveys and models is that said development unavoidably relies on assumptions and hypotheses.⁴¹

Version 0, had already observed that later stages of the development of the monitoring framework⁴² could further explore the use of administrative sources. This development aligns with Provision 17 of the Recommendation. The remaining challenges in the monitoring of access to social protection provide opportunities and ways forward.

A way forward in the short term would be to upgrade the monitoring framework to Version 1.0 and publish a comprehensive guide, consolidating Version 0 and the partial updates. This guide could map remaining challenges and the relevant research on monitoring access to social protection, the development of indicators, data availability, comparability, etc. Given the fact that there exist several monitoring frameworks in the field of social protection⁴³ (e.g. on pensions, on minimum income), it could be wise to coordinate as much

³⁹ The importance of administrative data for the performant monitoring of access to social protection has been discussed on multiple occasions. See for instance: European Commission, Joint Research Centre, Antón, J., Grande, R., Monitoring the effective coverage and adequacy of social protection in the EU – Development and update of the monitoring framework of the Council recommendation on access to social protection, 2022, <https://data.europa.eu/doi/10.2760/714939>, p. 59. Note the authors point out it is 'worth mentioning that there are several issues of comparability not commented in the monitoring framework that deserve greater attention' (op cit. p. 62). Comparability is most often lacking for international use but said lack can be observed in many cases also intra-nationally and or even inter-institutionally.

⁴⁰ Apart from issues regarding self-reported data, other issues remain, for instance with regard to sample size (see for instance: European Commission, Joint Research Centre, Antón, J., Grande, R., Monitoring the effective coverage and adequacy of social protection in the EU – Development and update of the monitoring framework of the Council recommendation on access to social protection, 2022, <https://data.europa.eu/doi/10.2760/714939>, p. 59).

⁴¹ For a discussion of an example, see for instance European Commission, Joint Research Centre, Antón, J., Grande, R., Monitoring the effective coverage and adequacy of social protection in the EU – Development and update of the monitoring framework of the Council recommendation on access to social protection, 2022, <https://data.europa.eu/doi/10.2760/714939>, p. 60. Also see: De Becker (2023). Social Security in the Combat of In-Work Poverty, in: Working Yet Poor: Challenges to EU social citizenship (eds. L. Ratti and P. Schoukens), Hart Publishing, 2023, <https://ssrn.com/abstract=4431610> (2023), 175. Also see: Immervoll, H. Fernández, R., Hye, R., Lee, J. & Pacifico, d. (2022). De-facto Gaps in Social Protection for Standard and Non-standard Workers: An Approach for Monitoring the Accessibility and Levels of Income Support, IZA DP No. 15289, IZA – Institute of Labor Economics, Bonn, <https://www.iza.org/publications/dp/15289/de-facto-gaps-in-social-protection-for-standard-and-non-standard-workers-an-approach-for-monitoring-the-accessibility-and-levels-of-income-support>.

⁴² European Commission (2020). Access to social protection for workers and the self-employed - Version 0 of the monitoring framework, <https://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=8358&furtherPubs=yes>,

⁴³ See, for instance, <https://ec.europa.eu/social/main.jsp?catId=1538&langId=en> and European Commission (2017). Indicators to measure Social Protection Performance: implications for EC Programming, Tools and Methods Series, Concept Paper N° 5, <https://op.europa.eu/en/publication-detail/-/publication/7cc15f72-ec38-11e6-ad7c-01aa75ed71a1>.

as possible these frameworks and explore the possibility of incorporating them in an overarching monitoring framework or strategy.

In the longer run, the issues regarding administrative data should be addressed. Several stakeholders have pointed out the relevance of administrative data as well as technological developments, past present and future, that were, are and will be able to improve both the administration as well as the monitoring of the access to social protection.

In the short term, it could be useful to start to envision what a future/improved⁴⁴ version of the monitoring framework — fully leveraging future possibilities regarding the availability of administrative data — could look like. The experience with the use of administrative data in Nordic Member States⁴⁵ on the one hand, and with the implementation of digital tools in Member States on the other, will provide ample inspiration, best practices and lessons learned. Furthermore, the recent technological evolutions in the use of Big Data, algorithms and Artificial Intelligence should make it possible to address many of the challenges and issues that the pooling of administrative data for the monitoring of access to social protection implies.⁴⁶ Such a version should also address issues such as cyber security, privacy-by-design, data ownership and, last but not least, interoperability⁴⁷.

⁴⁴ Or even an ideal version, which would allow mapping challenges and opportunities as well as the limitations even an ideal version would present.

⁴⁵ See, for instance: European Commission, Joint Research Centre, Antón, J., Grande, R., Monitoring the effective coverage and adequacy of social protection in the EU – Development and update of the monitoring framework of the Council recommendation on access to social protection, 2022, <https://data.europa.eu/doi/10.2760/714939>, p. 59 and the references there cited.

⁴⁶ Even legal ones such as privacy and data-protection or the legal impossibility in some Member States of combining fiscal and social protection related data. It is not unfeasible to imagine algorithms pooling and aggregating data at the individual level anonymously in order to obtain data at Member State level that would serve for comparable if not interoperable indicators that can be used within such monitoring framework. Also here, examples of good practices (with lessons learned) can already be found in Member States, for instance the Belgian Labour Market and Social Protection Datawarehouse (cf. <https://dwh.ksz-bcss.fgov.be/fr/homepage/index.html>). Inspiration could also be found at international organisations such as the OECD or ISSA (see for instance: OECD (2024), Modernising Access to Social Protection: Strategies, Technologies and Data Advances in OECD Countries, OECD Publishing, Paris, <https://doi.org/10.1787/af31746d-en>; and: Zaber, M., Casu, O. & Ernesto Brodersoh, E. (2024). Artificial intelligence in social security organizations, International Social Security Association and United Nations University, <https://unu.edu/sites/default/files/2024-06/2-AI%20in%20SecSoc%202024.pdf>).

⁴⁷ Within the European Interoperability Framework, interoperability is defined as: "the ability of organisations to interact towards mutually beneficial goals, involving the sharing of information and knowledge between these organisations, through the business processes they support, by means of the exchange of data between their ICT systems" (European Commission (2017). New European Interoperability Framework: Promoting seamless services and data flows for European public administrations, Luxembourg: Publications Office of the European Union, doi:10.2799/78681, p.5). The interoperability model includes four layers of interoperability: four layers of interoperability: legal, organisational, semantic and technical. For more information, see: European Commission (2017). Annex 2 to the Communication From The Commission To The European Parliament, The Council, The European Economic And Social Committee And The Committee Of The Regions, European Interoperability Framework - Implementation Strategy, https://eur-lex.europa.eu/resource.html?uri=cellar:2c2f2554-0faf-11e7-8a35-01aa75ed71a1.0017.02/DOC_3&format=PDF, p.18 et seq. In the author's view, for accurate and precise monitoring, mere comparability should be considered insufficient and interoperability preferred.

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