ESIP recommendations on digitalisation of social security coordination in Europe

The European Social Insurance Platform (ESIP) brings together 45 national social security organisations from around Europe, providing social security benefits to over 385 million European citizens. ESIP is uniquely qualified to inform EU decision-making, offer expertise, participate in innovative projects, advocate for fit-for-purpose EU initiatives, and support the day-to-day work of national institutions, including the regular use of current and future digital tools, due to our members' broad expertise and insights into the daily challenges of social security.

Digitalisation of social security coordination must, above all, enable our systems to respond to the challenges resulting from high mobility of citizens and workers across Europe (e.g., speeding up and simplifying procedures, facilitating exchanges between institutions, access to rights for beneficiaries, combating the risks of fraud and error etc.) in accordance with the provisions of Regulation 883/2004.

Social security institutions recognise that digitalisation of social security coordination is at the heart of system modernisation and value all the efforts and resources dedicated to it as it has the potential to facilitate interactions between social security institutions and with citizens. However, these efforts will only be successful if digitalisation initiatives meet the business needs of national social security institutions, simplify and facilitate administrative procedures, respect the unicity principle, increase the efficiency of processes, simplify access to services for citizens, reduce fraud and error. Social security institutions deploy considerable efforts and resources to achieve these aims.

Social security institutions covering social risks fulfil a public mission by insuring everyone fulfilling the legal conditions regardless of their socioeconomic background. Digitalisation should therefore make it easier to benefit from social coverage across the EU and enable a more efficient public service, particularly for mobile workers and citizens. We acknowledge the European Union's ambition of being the first digital continent via the Digital Decade 2030 strategy, but we caution against the global digital race defining the pace of digitalisation of social security coordination: well-designed and sustainable digital solutions are of utmost importance in this sensitive area of social security coordination.

Digitalisation is a means, not an end

When implementing new digital solutions, it is essential to remember that they are not an end in themselves, but rather a means to provide better administrative services to citizens and businesses. Social security institutions are keen on improving existing digital solutions by sharing their experience and expertise while contributing to the development of new ones that are people-centred, consistent, integrated, and easy to implement

In accordance with the principles and rights of the European Pillar of Social Rights (EPSR), digitalisation of social security should also aim to strengthen access to rights for people from

vulnerable groups (e.g. the elderly, the low qualified, those with low incomes, people with disabilities or those living in rural areas) who continue to experience difficulties in accessing dematerialised public services due to a lack of digital skills and access to IT equipment.

The processes of digitalisation and coordination at the European level require both short- and long-term planning, promoting digital literacy, making the most of operator knowledge, and a comprehensive and thorough understanding of the services provided by the institutions. The communication on digitalisation of social security coordination, presented by the European Commission on the 6th of September 2023, provides an overview of various ongoing digital projects but it does not outline a comprehensive vision, nor an overall coherent strategy connecting existing projects. Any forward-looking strategy should take into account the specificities of social security systems.
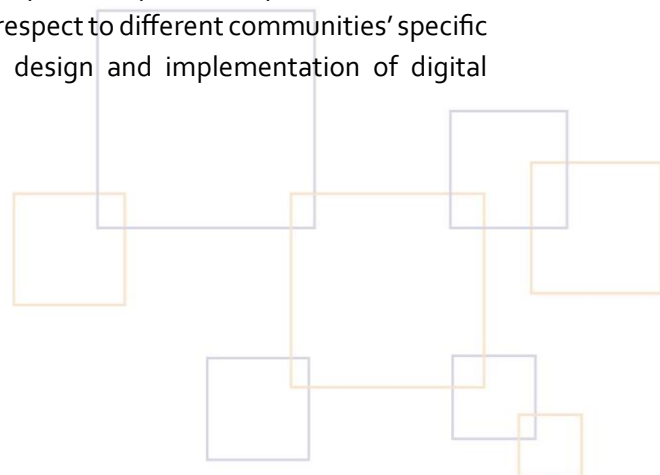

ESIP and its members therefore invite the European Commission and the European Council to:

➢ Be aware that digitalisation is not a goal but a means to improve services and access to rights for citizens when new legislation, projects, or actions are designed and implemented

➢ Ensure that digitalisation is used as a means to implement legislation and policies with a view to facilitating procedures for the beneficiaries and the businesses

➢ Acknowledge the specificities of social security systems when addressing the digitalisation of the sector

➢ Keep working on developing a concrete, comprehensive, and consistent vision for approaching digitalisation in order to deliver fit-for-purpose, user-friendly, and efficient digital solutions for day-to-day business

➢ Consider well-designed, cross-sectorial digital solutions co-established with the social security institutions and key stakeholders while using the already existing solutions

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Coherence and clarity: key for successful implementation

A holistic approach is necessary for the successful implementation of digitalisation in the field of social security coordination. This will provide short-term solutions to obstacles that undermine inter-institutional cooperation, combined with a long-term vision for efficient interoperability (in line with the Interoperable Europe Act proposal) based on the needs and resources available to social security institutions.

Social security institutions need more clarity on the exact scope of digitalisation of social security coordination, for example in relation to the substitutionary or complementary nature of online procedures compared to offline processes, especially with respect to different communities' specific needs. Such a clear understanding would facilitate the design and implementation of digital solutions.

ESIP and its members therefore invite the European Commission and the European Council to:

➢ Put in place a holistic approach to address digitalisation of social security and its coordination by integrating all existing and future digital initiatives within a coherent plan

➢ Ensure that the digitalisation of social security coordination is complementary to other processes, conducive to reducing administrative burden for social security institutions and for citizens, especially with regards to the needs of the most vulnerable ones.

➢ Digitise social security and its coordination processes wherever it is possible and most relevant while ensuring that no beneficiaries are left behind

➢ Define interoperability in the context of social security coordination while respecting the specificities of national social security systems

Benefiting from social security institutions' expertise

There is the need for a bottom-up approach to create a European digital architecture suitable for social security and its coordination, involving all stakeholders. Digitalisation should always be seen as a tool taking into account the needs and specificities of social security institutions as well as those of third parties namely beneficiaries, employers and other parts of public administration who interact with social security institutions. Digitalisation should simplify and accelerate administrative processes.

The holistic approach cannot be accomplished without the active participation of social security institutions and their experts. Every social security institution invests in digitalisation and has qualified departments for information and communications technology (ICT) that are fully aware of the potential and limitations of digital systems they design as well as the various users' business needs. Their knowledge and expertise are often crucial for the effective and efficient implementation of digital solutions designed at the European level. Harnessing this expertise and experience would help reduce the risks associated with the transition to new digital systems, thus avoiding the creation of gaps across Europe in digitalisation. A reliable and forward-looking planning in relation to the change management process in the Electronic Exchange of Social Security Information system (EESSI) and the software change for the EESSI access points are mentioned here as examples.

ESIP and its members therefore invite the European Commission and the European Council to:

➢ Consider input and feedback on digitalisation processes by social security institutions and their beneficiaries when proposing new legislations and projects

➢ Build on the expertise of social security ICT staff members and officers as much as possible and foresee appropriate channels to benefit from their knowledge

➢ Assess the outcomes and analyse lessons from current digitalisation projects and as well as their implementation such as EESSI

ESIP aisbl
Maison Européenne de la Protection Sociale
Rue Montoyer 40 • 1000 Bruxelles • ☎ +32 2 282 05 60 • 🖶 +32 2 282 05 98
✉ esip@esip.eu • 🌐 www.esip.eu • 🐦 @ESIP_EU • VAT: BE 0808.072.950

Looking ahead while taking stock of accomplishments so far

The European Commission's communication mentions and supports the idea of moving forward with legislative acts related to social security coordination and digitalisation. Digitalisation should be supported by legislation as well. Nevertheless, it is important to underline that digitalisation remains a tool, a method for organising communication and cooperation among social security institutions that is independent from legislative agenda.

Next to planning new projects, attention should be given to monitoring, updating, and revising current digital tools (such as but not limited to EESSI). This would contribute significantly to the work of national institutions as it would bring the existing platforms up to date and make them more operational. On the whole, it would be beneficial to harness the experience gained from existing tools that can feed into the design of future initiatives.

Moreover, EESSI is and must remain the cornerstone of the digital architecture for social security coordination. The completion of its implementation across all social security institutions must continue, following a logic of means for the states lagging behind in implementation, but more importantly, in a results-oriented approach to be fully operational. Fostering mutual and common understanding and fully implementing the principle of loyal cooperation are also key for the smooth functioning of EESSI.

Furthermore, the European Commission must ensure that the Single Digital Gateway (Regulation 2018/1724) is fully implemented before considering other digital initiatives.

> ESIP and its members therefore invite the European Commission and the European Council to:
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> ➢ Implement digital initiatives and solutions for social security coordination independent of the legislative agenda
> ➢ Ensure the improvement of existing digital coordination solutions, as well as interoperability to pave the way for new digital initiatives such as the implementation of the Single Digital Gateway regulation
> ➢ Monitor and revise current digital tools such as EESSI on the effectiveness of the exchange system but also the quality of the information exchanged, with respect to the principle of loyal cooperation, in order to meet the needs of social security institutions

Priority setting and wise use of resources for an efficient digitalisation

We welcome the European Labour Authority's (ELA) involvement in social security coordination, in supporting Member States as well as collecting national practices, facilitating exchanges between national authorities and analyse national digital solutions, in line with its objectives set out in Article 2 of its founding Regulation 2019/1149. Indeed, close cooperation between social security institutions and ELA could effectively improve the mobility of European workers, by making it easier to identify implementation difficulties and needs, as well as relevant technical solutions.

ESIP welcomes the listing of our members' best practices in the European Commission's communication. These are a living proof of ESIP members' determination to keep investing in these

solutions and in making coordination work, for the benefits of citizens, employers and institutions. Nonetheless, ESIP Members' commitment to turning social security integration, coordination and its digitalisation into a tangible reality for Europeans needs to be accompanied by an equally tangible and continuous support by the European Commission. Every new or existing pilot project or platform initiated by the European Commission has potential costs for social security institutions, both financially and in terms of human resources. These costs need to be appropriately taken into consideration and, whenever possible, supported by appropriate funding.

> ESIP and its members therefore invite the European Commission and the European Council to:
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> ➢ Consider the experience and feedback of social security institutions on the daily use of current digital solutions for further planning and monitoring
> ➢ Offer appropriate funding to support human resources and ICT needs for developing and implementing new digitalisation projects
> ➢ Proactively consult and enable participation of ESIP and its members in future EU projects and consortia aimed at knowledge exchange and the development of fit-for-purpose initiatives

ESIP and its Members are ready to share their expertise from the inception to the implementation of digitalisation projects that will be beneficial for all impacted stakeholders.