



Report from the Secretary General

Review for the Period 2007-2011
Annual Activity Report 2010



Table of Contents

Foreword by the former and current Secretary General	5	Deleted: 2
1.1 Caritas Europa engaging in policy and advocacy	9	Deleted: 2
Key achievements during the 2007 – 2011 mandate	9	Deleted: 2
Challenges during the 2007 – 2011 mandate	11	Deleted: 2
Specific recommendations for the future mandate	11	Deleted: 2
1.2 Caritas Europa communicating and campaigning	13	Deleted: 2
Key achievements during the 2007 – 2011 mandate	13	Deleted: 2
Challenges during the 2007 – 2011 mandate	14	Deleted: 2
Specific recommendations for the future mandate	15	Deleted: 2
1.3 Caritas Europa interacting with the network	16	Deleted: 2
Key achievements during the 2007 – 2011 mandate	16	Deleted: 2
Challenges during the 2007 – 2011 mandate	17	Deleted: 2
Specific recommendations for the future mandate	17	Deleted: 2
1.4 Caritas Europa interacting with Caritas Internationalis	18	Deleted: 2
Key achievements during the 2007 – 2011 mandate	18	Deleted: 2
Challenges during the 2007 – 2011 mandate	18	Deleted: 2
Specific recommendations for the future mandate	19	Deleted: 2
1.5 Caritas Europa engaging in European civil society	21	Deleted: 2
Key achievements during the 2007 – 2011 mandate	21	Deleted: 2
Challenges during the 2007 – 2011 mandate	23	Deleted: 2
Specific recommendations for the future mandate	23	Deleted: 2
1.6 Caritas Europa partnering with the European Commission	24	Deleted: 2
Key achievements during the 2007 – 2011 mandate	24	Deleted: 2
Challenges during the 2007 – 2011 mandate	25	Deleted: 2
1.7 Caritas Europa managing its internal organisation	26	Deleted: 2
Key achievements during the 2007 – 2011 mandate	26	Deleted: 2
Challenges during the 2007 – 2011 mandate	26	Deleted: 2
2.1 Strategic Priority “0” – ‘Zero Poverty’ and EY 2010	29	Deleted: 2
2.2 Strategic Priority I – Social Inclusion and Social Cohesion	30	Deleted: 2
2.3 Strategic Priority II – Migration, Asylum, Integration & Anti-Trafficking	31	Deleted: 2
2.4 Strategic Priorities III & IV (combined) – International Cooperation	32	Deleted: 2
2.5 Strategic Priority V – Strengthening the network and supporting members	33	Deleted: 2

2.6 Strategic Priority VI – Communications and external action.....	34	Deleted: 2
2.7 Succession in the post of Secretary General	35	Deleted: 2
3.1 The Changes in our World are Challenges for Caritas	39	Deleted: 2
3.2 The new Strategic Framework 2011-2020	39	Deleted: 2
ANNEX 1: SECRETARIAT - HUMAN AND TECHNICAL RESOURCES.....	41	Deleted: 2
Personnel formation - Overview on 01 May 2011.....	41	Deleted: 2
Team 'statistics' on 01 May 2011	41	Deleted: 2

Foreword by the former and current Secretary General

With pride and pleasure we jointly present to you this report of the Secretary General, prepared for the Regional Conference 2011.

This report is different from similar reports at previous Regional Conferences for three reasons.

- Firstly, it is a joint report by former Secretary General, Marius Wanders and current Secretary General, Jorge Nuño Mayer. Marius Wanders held the responsibility of Secretary General until 30th September 2010 and Jorge Nuño Mayer took over this responsibility as of 1st October 2010.
- Secondly, this Regional Conference marks the end of the four-year mandate 2007 – 2011 of the Executive Board and Secretary General of Caritas Europa, as well as the end of comparable mandates in Caritas Internationalis. Therefore in addition to the traditional more detailed reporting on the activities of the last year, in this case the year 2010, this report also wants to provide the membership with an overview of the past 4 years of the mandate 2007 – 2011 in terms of key achievements as well as of the important challenges that we encountered in delivering on our mission and strategic objectives.
- Last but not least, while we are still working in accordance with the strategic plan we adopted in 2004 for the period 2005-2010, Caritas Europa is on the verge of adopting a new strategic plan that will inspire the work that we want to accomplish in the next mandate period and beyond, as organisation and as network

This is also why this report features **three distinctive sections: Past, present and future**. Section 1 offers a global overview of past key achievements and challenges observed in the course of the mandate 2007 – 2011 which is now ending; Section 2 is the present Annual Activity report for the year 2010 (including as an Annex a Book of the Year about the wealth of actions throughout the network in the context of EY2010); and Section 3 is the section in which Secretary General Jorge Nuño Mayer will be mostly looking forward to the future, beginning with an update on the process of the strategic plan.

A short word about the methodology: For obvious reasons, former Secretary General Marius Wanders assumed responsibility for the creation and content Section 1, while current Secretary General Jorge Nuño Mayer for equally obvious reasons assumed responsibility for the creation and content of Section 3. Section 2 was established under joint responsibility and based mostly on input from the Secretariat staff.

The review of the past 4 years of our mandate (Section 1 of the report) has been established mostly by interviewing and/or questioning a wide circle of persons in the network but also some external stakeholders, who over the past 4 years have been in one way or the other very instrumental in the work of Caritas Europa. Using the same three questions, we solicited their views on what specific achievements over the past 4 years they particularly rejoiced in but also what they would have liked to see different or what clear challenges they observed. Our final question was to formulate one specific recommendation for Caritas in Europe in the future. In presenting the rich input that we have thus received, we have deliberately not put it in the order of the strategic priorities, but 'grouped' under certain functions of Caritas Europa that are common to more or all strategic priority areas.

We sincerely hope that this report, with its three distinctive sections, provides a valuable testimonial to our work of 2007 – 2011 while at the same time encouraging and inspiring us for the journey ahead.

Brussels, May 2011

Jorge Nuño Mayer
Secretary General (2010-2015)

Marius Wanders
Secretary General (2002-2010)

Section 1.

Review of mandate period 2007 - 2011

1.1 Caritas Europa engaging in policy and advocacy

Key achievements during the 2007 – 2011 mandate

In a range of countries and at the level of Caritas Europa itself we have continued the development of **social policy** which had started in 2005, and in 2006 manifested by the CONCEPT Project. This development was a consequence of CE's 2005-2010 Strategic Plan, priority I, starting with goal 1.

One of the biggest achievements within the CONCEPT project was the creation, training and engagement in policy activities of a network of Caritas experts on social inclusion. Caritas Europa was able to equip its network with the

"Luc Trouillard, a former Secretary General of Caritas Europa, once described Caritas as 'a giant in humanitarian action but a dwarf in social policy and advocacy'. I believe this has now changed...."

"But despite a lot of training, regularly updated toolboxes, bi-annual social policy forum and conferences, summer universities, geographical and thematic working groups, we still cannot pretend to be as active in this field as some other NGO's co-financed by the EU under the same PROGRESS Program."

Robert Urbé, Caritas Luxemburg, President of the Social Policy Commission

necessary tools and insights in European strategies. In their turn the Caritas experts were able to bring to Caritas Europa experiences and expertise of their practical work. Subsequently, the quality of the work has been recognised by the European stakeholders.

Both in Caritas Europa and in a significant number of member organisations, more awareness was generated that investing in 'social policy' was essential and that dedicated social policy desk officers needed to be recruited and appointed. Competence grew significantly during this period. 'Social policy' was understood to not only deal with difficulties and achievements of a wide range of social services that Caritas provides throughout Europe, but also with advocacy issues.

Building on the positive experiences under the CONCEPT program, the INCLUSION program offered opportunities to Caritas to consolidate and expand the knowledge, capacity and potential for impact of the network of experts on EU social inclusion policies. The establishment and consolidation of the INCLUSION network, a wide and open group of Caritas experts on social inclusion that can exchange with one another and reach common positions, is one of the most notable achievements of the past four years. This has also allowed the development of policy positions and messages, among which the important messages on Europe 2020 that were presented in the Congress of Madrid 2010

The CONCEPT and INCLUSION Projects were about coordinating this growing awareness and competence, training and sharing information regarding the establishment, implementation, monitoring and evaluation of National Action Plans on social inclusion and to a lesser extend the National Reform Programs, in the framework of the social Open Method of Coordination the first and of the Lisbon Strategy the latter. This opened for many Caritas workers doors that never before were open for them, especially in the national Ministries (of Labour, Social Affairs etc.).

The creation of the Policy Paper *"In solidarity with people living with or affected by HIV/AIDS"* was one of the important achievements of Caritas Europa over the last years. The Policy Paper aimed to mobilise the Church and Caritas organisations to engage in responding to HIV/AIDS problem. The document assumed special significance for countries in Eastern Europe where the pandemic has taken alarming proportions.

Caritas in Europe also demonstrated consolidated and recognized expertise in the field of **migration**, visible through the work of the migration officer and the migration commission and the cooperation with other Christian networks at EU level. The expertise of Caritas organisations in Europe, including the secretariat, were also a valuable resource to

draw on for the work on migration at Caritas Internationalis, notably for the Conference “The female face of migration” and the UNHCR – NGO Annual Consultations in Geneva.

Caritas in Europe strengthened its profile in the area of the EU policies on **integration and migration**. As a result, Caritas consistently receives and responds to consultations by European policy makers, requesting our policy input. Our responses are demonstrably leading to concrete changes in draft European and national policies and our key messages are becoming more and more integrated into European and national policies.

Also in the area of **labour migration**, the profile of Caritas in Europe as an expert policy actor has increased, although in this specific thematic field we are not yet observing as many concrete policy results from this advocacy as we would have liked.

Through taking the operational and legal responsibility for **COATNET**, Caritas Europa managed to maintain and widen the work of Caritas organizations on combating trafficking of human beings, firstly in Europe and expanding to embrace a global network. A strong feature and added value of this network was the truly ecumenical partnership embedded in COATNET.

Working on Trafficking in Human Beings within the Church and its organisations has not always been easy. By fostering cooperation and exchange people in the network and actively engaging in prevention, assistance and advocacy on Trafficking the topic can now be considered as mainstreamed within the Caritas structure and to a certain extent within the Church.

The Annual COATNET Conference became a more prestigious and productive gathering each year, and the last Annual Conference organized under Caritas Europa leadership (October 2009) featured intensive interaction with the leadership of the Orthodox Church. At the beginning of 2010, the legal responsibility for the rapidly grown COATNET network was transferred to Caritas Internationalis.

The semi-annual series of **‘troika’ engagements with the EU Presidencies** have proven to be a highly successful and valuable instrument in bringing forward our policy and advocacy work. Very often we observe two important additional benefits from this approach:

- A strengthened European profile for Caritas, leading to more invitations to attend and/or contribute to seminars or conferences and more opportunities to influence policies
- A strengthened profile for Caritas in the member state as a credible and competent policy actor

In the area of international development and peace, a transition took place towards a focus on policy issues and advocacy work. This resulted in the timely production of quality policy positions on a variety of issues, reflecting Caritas values and identity. Themes covered by these policy positions included EU Development Policy, the Millennium Development Goals, Disaster Risk Reduction, Migration & Development, Food Security, the Common Agricultural Policy and External Action Funding. Follow-up action was undertaken with key decision-makers in the Parliament and the Commission. Caritas Europa made a specific contribution to the Spotlight Report of Concord on Policy Coherence for Development by writing the chapter on Migration and Development.

"A challenge I could observe is the missing self-understanding or clear mandate of the Secretariat of Caritas Europa. Urgent European issues need an immediate reaction from the secretariat – on behalf of the MO."

An immediate reaction does not always allow lengthy consultations with MO. A clear mandate does not mean centralisation, it stands for mutual trust and trust in the secretariat's specialised expertise on the European policy level."

Karin Keil, Caritas Austria, President of the Migration Commission

Challenges during the 2007 – 2011 mandate

It remains a big challenge for Caritas Europa to mobilise the network sufficiently in order to collect policy contributions to feed into our European level positions. Caritas Europa policy contributions to the EU show the full diversity of our member organisations (East/West, Caritas/dual CE-CIDSE, big/small) and thus provide a reliable ‘cross section’ of the experience, reflection and positioning of the network as a whole. In reality, however, there is a **fairly narrow ‘bandwidth’ of member opinions** (the ‘usual suspects’) upon which our advocacy is based. In a network with 48 member organisations, it is somewhat embarrassing that our policy positions are more often than not based on contributions from five or less member organisations.

Policy and advocacy work of Caritas in Europe also **needs more focus and prioritisation**. We work on **too many advocacy topics and themes** but do not have enough human and technical resources to lobby the EU institutions intensively enough to ensure a greater impact. In short, **we need more ‘depth’ and less ‘width’** in the themes and content of our advocacy work.

We invest considerable time, energy and expenses in organising meetings. However, there appears to be an **imbalance** between the essential **‘internally oriented’** interaction of planning, coordination, management, and training/capacity building and the equally essential **content of our work** and **‘externally oriented’** interaction. In short, substantial time and energy are devoted to discussing the ‘who/when/where/how’, often at the expense of actually discussing the ‘what’, i.e. the real content of advocacy work.

Caritas Europa has developed a considerable amount of very thoroughly researched and discussed policy papers. However they were often not reduced to short and understandable “slogans” for a wider public and thus might not always have had the desired effect.

It was a challenge to have enough resources to systematically analyze the impact of the policy work, although this is a challenge for all of Caritas and not unique to Caritas Europa.

Specific recommendations for the future mandate

- It is recommended that Caritas in Europe promotes awareness at all levels of the network (global level, European level, national level) of the implications and potential benefits of the **dual identity of each Caritas as a local and ‘global’ actor**. This way, policy and advocacy work at global and/or European level would not only take into account realities and experience at national and local levels, but vice versa, national and local policy and advocacy work would also become more aligned with priorities and content of Caritas global and European advocacy work. In short, especially in policy and advocacy work, it is recommended that we become more aware at all levels of this **‘dual citizenship’**.
- It is recommended that Caritas in Europe starts a reflection process aiming at a **joint vision and approaches** regarding the **participation of people experiencing poverty and social exclusion**. The leadership in member organisations could be made aware and be convinced that in addition to provision of social services, it is also part of the Caritas mission to **give a voice to people in need** and to encourage, enable and allow them to voice their concerns themselves. Caritas Europa could initiate efforts to arrive at a common understanding of this aspect of the Caritas mission, through peer reviews.
- It is recommended that Caritas member organisations will be encouraged to be more responsive to policy solicitations from Brussels, and to take initiatives and give spontaneous input on any (national) policy matter that they see arise and consider as relevant or important also for Caritas Europa.
- It is recommended that the President, Secretary General and Board members of Caritas Europa will become involved more often and more directly in implementing Caritas Europa advocacy activities in Brussels and other European capital cities. They can be the “faces” for Caritas Europa that are recognized and respected in

the Brussels scene. These persons can develop a wide personal network of useful contacts within EU institutions, civil society partners and think tanks.

1.2 Caritas Europa communicating and campaigning

Key achievements during the 2007 – 2011 mandate

One of the major achievements of CE during these 4 years has been the steady improvement of **online communications**. From initially using the internet as a mere one-way 'top down' communication channel, Caritas Europa has very much evolved the way it uses on line communication. The Caritas Europa website has now become a truly two-way channel for exchange, sharing and mutual engagement of members as well as for Caritas Europa. It also has a "leave a comment" function, encouraging visitors and the general public to engage with us in dialogue. In the same spirit, Caritas Europa is now also present and quite active on Facebook and on Twitter and we support video sharing by our members on YouTube. We can still get better and improve, but at least we are "on track" now.

The online side of the Zero Poverty campaign was very much based on this idea of interacting through internet. And, as a matter of fact, the webpage received a lot of positive feedbacks from other NGOs in Brussels and the European Commission itself.

For the first time in its history, Caritas Europa initiated a **Europe-wide Caritas campaign 'ZERO POVERTY'** in the context of the European Year 2010 for combating poverty and social exclusion. Preparations for this campaign by a multi-disciplinary task force started as early as the summer of 2008. The ZERO POVERTY campaign produced **strong network-wide action towards a common goal** with shared messages. It increased awareness among members that they belong to and are an integral part of a strong European network. The campaign also resulted in increased consciousness about the importance of the EU as a relevant social policy player within Europe and European societies, in and beyond EU member states.

Youth, communities, Caritas organisations and our many Caritas volunteers: they all mobilised with enthusiasm in this first common campaign. 'ZERO POVERTY' contributed to the profiling of the Caritas network as a strong, broad, knowledgeable and active network of European organisations **within and beyond the EU borders**. The campaign also **strengthened the National organisation's status at country level** by giving it more visibility and recognition as one of the members of this vast network. The network's engagement in the campaign has been an excellent **opportunity to strengthen the organisational capacity and management of the network as a whole**.

One of the more conspicuous elements at the heart of the campaign was a **petition against poverty**, which could be signed on line and on paper. The network of Caritas in Europe mobilised massively in support of this campaign and in total 171.294 signatures were collected supporting the Caritas Europa petition.

Apart from influencing the mindset of the general public – and hopefully politicians - this campaign has been a great success in terms of **creating ownership in the network, partnering with the EU Institutions, and actively engaging member organisations (MO) in European countries at all levels**.

"For me personally the most satisfactory thing I have experienced has been the "togetherness" that was felt throughout the year 2010 - throughout the ZERO POVERTY campaign.

In the first place this was of course the fruit of overwhelming engagement and mobilisation of friends and colleagues in the network.

But it has also somehow helped me to keep the regular, weekly and quite informal 'Friends of the Year' (FOY) communications going, something I have very, very much enjoyed taking care of!

To me, the "Book of the Year" compilation is a valuable souvenir that nicely reflects our joint efforts in 2010!"

Miriam Pikaar, Caritas Europa Secretariat, Project Manager INCLUSION and EY 2010

"To me, the zero-poverty campaign is one of the main achievements of Caritas in Europe. It sets out a vision very pertinent to Caritas (preferential option for the poor) and links in the different levels of Caritas, local, national and regional as well as integrating persons from the network across working areas.

Looking at it 'from the outside' it certainly contributed to make Caritas Europa a "player" in the Social policy area of the EU at a similar level as the well established work on migration.

The 'Zero Poverty' campaign inspired Caritas Internationalis with regard to the overarching topic of its next Strategic Framework, 2011 – 2015."

Martina Liebsch, Policy & Advocacy Director, Caritas Internationalis

We were given the opportunity to present the – at the time – 135.498 signatures collected in the framework of the ZERO POVERTY petition at the EU Closing event: On 17 December **EU-level Ambassador for EY 2010** Lesley-Ann Knight (Caritas Internationalis) presented them to the representative of the Belgian **EU Presidency**.

Through our campaign with its numerous activities and events, we have been able to **increase our engagement with representatives from different EU Institutions as well as with the Council of Europe** at a number of occasions. We also increased our collegial engagement with other European level civil society organisations. The same benefits were also replicated at national level, where in the context of the campaign, member organisations established contacts with their national decision makers and civil society actors and created promising relationships to be built upon.

Through the Annual Forum of Communicators and Fundraisers, and benefiting from highly expert external speakers at such events, we have made important progress in building individual capacities of member organisations to effectively use communications to support our fundraising efforts and vice versa, use fundraising as a means of communicating our messages.

Challenges during the 2007 – 2011 mandate

Financially weaker member organisations often lacked the ability to access the resources needed to enable them to fully engage- **especially in these times of crisis when the priorities for action needed national focus;**

Our joint messages, such as those in the campaign petition, were found to be too weak by some member organisations that tend to be more ambitious in their demands and claims, but too strong by other member organisations, for instance those in countries where it may be politically undesirable to claim ZERO poverty.

There is a persisting difficulty in making 'the network' feel, act and behave act as such, and this is also quite visible in terms of communications. It seems that there is insufficient ownership of the common Caritas "brand". It is a real shame that there is a certain level of 'atomisation' in the network, with many members using national names that make no reference at all to their Caritas identity and using often different logo's. From a communications point of view, this is quite frustrating and causes a lot of extra time and effort. It also causes us to miss opportunities.

In a sense, the Zero Poverty gave us a clear example. We may be rightfully proud that after a year of intensive campaigning we ended up with more than 171,000 signatures for our Zero Poverty petition. However, this number takes on a different significance if we consider that in theory we have the potential to mobilise millions – starting with those hundreds of thousands of people currently working as staff or volunteer in the Caritas network across Europe!

Was it really unrealistic that we initially planned to collect more than one million signatures, given that we had a year to do so? If not, why did we not succeed? We need to reflect on these questions and learn from the answers.

Specific recommendations for the future mandate

- For a campaign such as 'Zero Poverty' it is absolutely indispensable to **clearly set goals and outcomes and to identify a set of Objectively Verifiable Indicators (OVI)** to help us measure success/progress. What remains less clear is how to objectively measure the impact on member organisations of Caritas Europa activities such as those conducted under INCLUSION. This is something different but just as important. A point to be further improved therefore is our **result orientation** when it comes to campaigning.
- Caritas in Europe needs to **continue to invest in professional communications**. Especially in a network like Caritas in Europe, communications are like the lubricating oil in a complex machine: it is what keeps the engine running smoothly. Communications methodologies and technologies are evolving at a lightning pace and so should we evolve the way we approach communications in Caritas in Europe. Quite apart from embracing and using new technologies and communications tools, 'cloud' computing and other developments, we need most of all to evolve from 'an organisation that also deals with communications' to truly **becoming 'a communicating organisation'**, which manages to communicate clear, simple and powerful messages and stories, backed up by deep professional analysis. Among many other things, this implies that sufficient resources, including not only staff but also effective governance and working structures, need to be made available to enable us to make that essential transformation.
- In this respect, the **branding issue** is one of the 'elephants in the room' that we must be brave enough to discuss. With full respect for national marketing and fundraising strategies and considerations, we must find at all levels in the network a renewed sense of pride in belonging to the universal Caritas family and brand, and use it to strengthen the impact of our messages and of our actions. After all, 'I am Caritas' applies to all of us, regardless of the name or the logo under which we operate in our local or national market place. 'I am Caritas' should not remain or become a small print subtitle... it should be what we take pride in, what defines us and what forms the basis of our work.

"The communications potential within this network is immense and yet Caritas still acts like a giant on feet made of mud."

Alain Rodriguez, Web editor/Communications Officer, Caritas Europa

1.3 Caritas Europa interacting with the network

Key achievements during the 2007 – 2011 mandate

A process of coordination for responding to small scale emergencies in Europe was set in motion with a focus on cross-border collaboration of member organisations in South Eastern Europe

"The CMS process, during its developing phase, has been very interesting because it has raised a lot of reactions and comments from member organisation on the identity of Caritas organisations"

Marc Somers, Caritas Belgium, member of the Commission on Internal Network (CIN), President of the ESF Committee

The CE system of coordination for project applications submitted to ECHO was reviewed and improved. This includes the running of a projects database from 2003 onwards.

Traditionally, Forum meetings have served as 'think tanks' for the network and proved useful in organising high level input into a large consultation process. They also provide welcome opportunities for mutual collaboration and coordination. They have helped to strengthen trust and confidence within members and made Caritas Europa a more cohesive network. Throughout the period 2007-2011, a number of such successful Forum meetings have

taken place with varying frequency: Social Policy Forum meetings, Migration Forum meetings, Emergency Forum meetings, IEC's, Management Forum meetings and Communications Forum meetings.

After the Mid-term Review of the international work of Caritas Europa (Priorities III and IV) was completed in 2008, an **International Forum** replaced the Emergency Forum, which will in the future be an activity of Caritas Internationalis (CI). The Caritas Europa International Forum brings together practitioners from humanitarian and development departments of MOs as well as a mix of people working in program departments and people working in advocacy.

Two very interesting **management forum meetings**, one in Budapest and one in Paris, were organised to discuss with the leadership of Caritas member organisation on the identity of Caritas and on being part of the church but also being professional with love. These forum meetings were the places where the **Common Management Standards (CMS)** were introduced and discussed with the membership.

The tool of these CMS, the auto-evaluation questionnaire and the peer to peer methodology offered to members is another innovation developed by the Organisational Development Working Group (ODWG). This tool can contribute to improve the quality of management aspects in member organisations and bring them a big way forward in becoming learning organisations. Having the CMS in place after many years of active involvement of member organisations is a clear sign

of mutual recognition and appreciation for the diversity among members of a common network while still embracing commonly accepted and applied management standards. The CMS means for every organisation a step further, so that they can become even more professional

"The absolute 'winner' for me of the past years is the improvement we achieved in management and functioning of the European Solidarity Fund (ESF)

It has become a tool truly 'owned' by Caritas Europa and by the network as a whole. Close and regular consultation with donors and recipients led to the creation of the ESF handbook and to a clear and transparent new application form, which many ESF recipients also use as financial management tool."

Annamaria Vrzackova, Officer for Internal Network, Caritas Europa

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"I highly appreciate the way ESF committee was working and the way Caritas Europe was reacting to the crisis situation in different member organizations. The knowledge exchange systems were really good. The created platforms on different topics helped many organizations in developing countries to develop methodologies and improve their ways of interventions in different spheres."

Anahit Mkhoyan, Armenian Caritas,
Org. Development Working Group

Cooperation and constructive dialogue between member organisations allowed Caritas Europa to develop and/or further improve the **European Solidarity Fund (ESF)**, which has been improved as an instrument for network building. An ESF manual was developed to assist the members in using the ESF. When filling in the newly developed ESF forms, the member organisation gets a good view of its own financial sustainability over a longer period. The ESF committee furthermore organises regular workshops and trainings, it assist members with filling in the forms and at the end of the yearly cycle proposes how the funds, pledged by donors, can be best used in order to support members in need for improving their financial sustainability.

Challenges during the 2007 – 2011 mandate

The mid-term review (MTR) of strategic priorities III and IV was poorly organized, took too much time (almost 2 years) and lacked vision. It was also confusing in terms of who was leading and driving the process. The MTR led to fundamental changes in the way of working, to new working structures and to new priorities. But all this is now put into question again with the discussion of the new strategic plan, which started less than 2 years after the MTR outcomes have begun to be implemented. This poses a challenge towards member organisations as well as staff in terms of “readability” and “continuity” of the work of Caritas Europa and frustrates mobilization of member organisations, especially in policy and advocacy work

It remains a challenge for Caritas in Europe to consider innovative options when it comes to “other financial resources”. From 2007 onwards, a good collaboration has started years back with FEBEA (European Federation of the Ethical and Alternative Banks), but collaboration at European level was not further pursued, even though experience shows that many member organisations are in fact in contact and even in partnership with member banks of FEBEA. Perhaps we are to a certain sense a ‘closed society’ in Caritas, or maybe we lack information and insight on how such these banks work and where we could benefit from cooperation. Perhaps we need to be more courageous in embracing and exploring innovative and ‘new’ types of partnership and dare to engage with non-traditional partners.

Specific recommendations for the future mandate

- It is recommended that Caritas Europa seriously considers how it can improve the **balance between women and men in the Board**, which continues to be predominantly composed of men. If anything, the situation is getting worse rather than better.
- It is recommended that Caritas Europa builds on knowledge and capacities present within the members. This knowledge can be better mobilised, tapped and made available for the bigger network. Because regardless of what priorities or goals Caritas in Europe will be working on, it will always need the best resources in the network willing and able to contribute to those goals and it will have to make use of the existing richness of information, expertise and experience. In order to support this, it is strongly recommended that Caritas Europa develops an appropriate **knowledge management system**. As always Caritas Europa would develop this in a highly participative way by using expertise and know how available in the network, by analysing thoroughly what members needs are and what they will use, by testing and investing in training in order to ensure that the best possible tools will be chosen.
- It is recommended to further reflect on systematically monitoring, evaluating and improving the effectiveness of its activities, including policy and advocacy work, in terms of both quality and quantity.

1.4 Caritas Europa interacting with Caritas Internationalis

Key achievements during the 2007 – 2011 mandate

When new leadership took over in Caritas Internationalis in 2007, it strategically needed to strengthen its coordination and leadership in humanitarian responses and in global policy and advocacy. Starting with intensive dialogue and reflection during the Regional Conference of 2008 in Bled (Slovenia), agreement was reached and common understanding was generated within the European network that the work traditionally done by Caritas in Europe needed to be better aligned with and fully feeding into the global agenda of Caritas Internationalis, so that a stronger level of synergy would be achieved. Rather than to a certain extent being 'in competition' with Caritas Internationalis, Caritas in Europe recognised and identified the risk inherent to duplication of efforts. Through a process of dialogue we were able to come to a real understanding of the importance of this mutual interdependence.

The active participation by the leadership of Caritas Internationalis in the Migration Forum, Management Forum and especially in the new International Forum of Caritas Europa contributed to strengthening the synergy we all wanted to achieve, as did the many contributions made by persons and structures of Caritas Europa in the governance, working groups and events of Caritas Internationalis. Strong links with the other regions of Caritas Internationalis were further fostered by the commitment of the Caritas Europa Secretary General as member of the team of Regional Coordinators.

Concretely, through a process of intensive member consultation, Caritas Europa provided key contributions to the revision of the **Confederation's Emergency Guidelines**. The guidelines enable Caritas members to maximise joint efforts, to support with professionalism and compassion those affected by crisis and disasters and to enable the local Caritas and Church to fulfil their social mission. Along with the guidelines, a **toolkit** was developed which is becoming the standard norm to be followed through all stages of project cycle management, from needs assessment to impact evaluation.

Another concrete achievement was the mandate given to the Policy Officer for International Cooperation of Caritas Europa, representing both Caritas and CIDSE in the Open Forum Process on CSO Development Effectiveness.

Challenges during the 2007 – 2011 mandate

In order to support the process of strengthening the global leadership role of Caritas Internationalis, Caritas Europa took the decision to discontinue the Humanitarian Aid Commission, the Commission for International Development and Peace and all its IEC structures and to bring the Emergency Forum under the responsibility of Caritas Internationalis. The relative suddenness and abruptness of this restructuring operation took many people in the

"I believe that the Caritas Europa Secretary General, working in partnership with the Board, achieved some outstanding work over the past four years. A core part of this work was a review of development and humanitarian work within Europe and the role of Commissions. This was a difficult and sensitive review but one which was managed with care and professionalism by the Secretary General and reporting to Board and President.

Resulting from the review it was agreed to close down the development and humanitarian commissions and shift this work to CI and to the central stage of the Caritas Confederation. This was a tough decision but I commend the change process which then took place for its transparency by how the change was managed. Part of this involved working closely with the CI Secretary General with whom a strong relationship had been created."

Matthew Carter, CAFOD, President of the Humanitarian Aid Commission (2003-2009)

"In my opinion, the last years saw too many discussions around structures and made Caritas very much inward looking. Precious time may have been lost this way and much of our energy may have been wasted."

Harald Happel, Humanitarian Officer, Caritas Europa

network of Caritas in Europe by surprise. Some people who had served in the discontinued structures felt personally underappreciated and questioned the wisdom of these decisions, especially since they left the network in Europe in some sort of vacuum in this work area, certainly in terms of engaging with the EU. This vacuum could not be fully filled by new 'light and flexible' structures that were created only some time later. The new working groups "International Policy and Advocacy" (IPA) and "Funding and Operational Relations" (FOR) were governed by Board members and consequently lacked 'good governance' and

leadership by key subject matter experts in the European network. In retrospect, the impression existed that the decision to discontinue existing and well functioning structures of Caritas Europa was driven more by diplomatic and political considerations than by clear analysis of the potential gains and losses as a result of the decision. In retrospect, other options or another calendar for this option might have been given more consideration.

Some European Caritas member organisations have felt that the process of creation of the Caritas Internationalis Humanitarian Advisory Council, while being a good concept, has lacked transparency in its membership criteria and in its remit. In many ways it remained a body made up from former members of the Caritas Europa Humanitarian Aid Commission, with a number of additional members from global Caritas member organisations. It is also still dominated by northern members (4 members from Asia, Africa and LAC; 8 members from Europe, North America and Australia).

A real challenge has been the adaptation to a new role for the international cooperation staff at the Brussels secretariat since the major changes to the development and humanitarian working structures. At the time of the changes it was believed that Caritas Europa staff would work to support a limited capacity at the level of Caritas Internationalis. In practice, it was sometimes felt that 'lines were drawn in the sand' by both sides and there has been insufficient willingness to work together and resolve problems or misunderstandings.

Another challenge in terms of interaction between Caritas in Europe and Caritas Internationalis was that the theological reflection developed within Caritas Internationalis during the past mandate has not yet sufficiently been integrated enough in the way Caritas in Europe is conducting its work, at the level of the network and at the level of member organisations. 'I am Caritas' is just one example of this new way of thinking about the role and identity of Caritas which needs strengthening in our European network. The excellent body of theology work developed by the Theology Commission of Caritas Internationalis should be more 'mainstreamed' in the work of Caritas in Europe.

Specific recommendations for the future mandate

- A lesson to learn is that in future we try to avoid replacing structures, which are functioning well and are owned by key professionals from across the network, half way through the implementation of an existing Strategic Plan for which these structures were created. It is in fact quite difficult and time consuming to bring new life to a completely new system and methodology of working together and create a sense of ownership for this system and methodology among members.
- When implementing the new Strategic Plan, it is recommended to consider the merits and added value of both existing and new structures and working methods, so that structures will be mandates that will ultimately help us to better read the "signs of the times" and will better enable us to tackle present and future challenges.

- As an ideal vision, all Caritas organisations – in Europe and across the world – will in future feel that they belong to one big global family. Being a family implies more than being there in support and solidarity when there is an emergency or a disaster. It also implies being proud of one another and rejoicing together at a key achievement of one of us, no matter how ‘small or insignificant’ this may seem in the grand scheme of things. For instance, the successful publication and presentation of a national poverty study in Albania, or a well organised and effective local program of rehabilitating drug users in Malta, will be something that we are all aware of and proud of across the wide, global network. The big global family of Caritas in the future will be a family where diversity and creativity in the way we express our charitable action are not only allowed, but they are actually cherished and encouraged.
- It is recommended that Caritas in Europe continues to strengthen both formal and informal links with Caritas Internationalis, and that the interaction between these ‘two sides of the same coin’ will be about partnership and working in solidarity for the good of the poor and about reducing suffering and loss of life in humanitarian crises.

1.5 Caritas Europa engaging in European civil society

Key achievements during the 2007 – 2011 mandate

Caritas Europa has strengthened its profile and its role within civil society at European level. The best illustration is without a doubt the recognition by the European Commission that Caritas in Europe is a valuable partner network for the Commission in the pursuit of its objectives of a socially inclusive Europe. This recognition has resulted not only in

warding to Caritas 8 consecutive years of important EU co-financing (first CONCEPT during 2006 – 2007, then INCLUSION 1 during 2008 – 2010 and then INCLUSION 2 during 2011 – 2013), but also in an increasingly prestigious profile of Caritas among its peer networks.

Caritas Europa invested time, energy and expertise in a number of key EU-level platforms, most notably the Platform of European Social NGOs (Social Platform) in the area of social policy of the EU, CONCORD in the area of international development policy of the EU and VOICE in the area of humanitarian policy of the EU.

Partnership with and membership in platforms such as Social Platform, CONCORD and VOICE provide both parties with advantages. For Caritas the advantage is usually more and easier access to policy intelligence and to key individual policy-makers and for these platforms the advantage is the enrichment of their work with the Caritas vision and expertise

With regard to the Social Platform, during the past 6 years, Caritas has held an elected mandate in the Management Committee (Board) and was represented there by Patrick De Bucquois (Caritas Belgium). We also contributed strongly to the different thematic working groups of the Social Platform, mostly through the Social Policy Analyst at the Secretariat, Adriana Opmolla. Last but not least, Caritas received and accepted regular invitations from the Social Platform to be represented in the delegation of the Social Platform for encounters with the EPSCO Council, the gathering of the ministers for Social Affairs and Employment of the EU member states, hosted by the rotating EU Presidency. On one such occasion in France, the President of Secours Catholique – Caritas

France, Francois Soulage, was part of the Social Platform delegation. On a later occasion in Spain, Sebastian Mora, Secretary General of Caritas Spain, was part of the Social Platform delegation.

"In 2009, in the framework of first CONCORD shadow report on Policy Coherence for Development (PCD), Caritas made a valuable contribution to the thematic chapter on "Migration and Development". Beyond the quality of the input, Caritas was (is) one of the few CONCORD member organizations that can bridge / connect the big issue of Migration (as a domestic and highly political European issue) with the broader international development agenda.

Caritas has provided high level leadership within CONCORD confederation on several occasions of the building up of the organization. For example, through its Secretary General who contributed actively during the 'Assessment and Adjustment process' of CONCORD that led to the 2nd CONCORD Multiannual Strategic Plan 2009-2015 (this long process lasted two years from 2006 to 2008).

Furthermore, the Caritas family and network (but "formally" through the respective national platforms) provided the two first Presidents of CONCORD (from 2003 to 2012). More recently, the Caritas Policy Officer on Development has been taking active leadership in the international process called 'Open Forum on CSD Development Effectiveness'. Active leadership from the membership is one of the key conditions for success of a 'members led' organization."

Olivier Consolo, Director of CONCORD

Apart from the above 'membership' based partnership with formal EU level platforms, Caritas Europa also participates and even leads in a number of less formal coalitions, such as the informal network of Christian organisations dealing with migration issues.

Challenges during the 2007 – 2011 mandate

In order to make meaningful contributions to civil society platforms like Social Platform, CONCORD and VOICE, substantial investment of time and energy (and thus precious resources) is required. It is often quite challenging to prioritize between time and energy used for 'Caritas only' purposes and time and energy used for 'Caritas through civil society platforms' purposes, and obviously we tend to favour the former, not the latter. But as a network that prides itself as one of the largest in the world, 'noblesse oblige'...

At the same time, we need to be conscious that the positions adopted by multi-stakeholder platforms need to reflect the diversity of their wide membership and will as a result never reflect specific Caritas values and principles as well as a 'go-it-alone' position by Caritas individually would do. This creates a natural field of tension.

Specific recommendations for the future mandate

- Given the fairly unique position of Caritas as a network engaging in not only in domestic social policies, but also in migration related policies and in international development policies, it is recommended that Caritas capitalizes on that uniqueness by taking the lead and developing initiatives to better link these different policy areas, using its engagement with civil society organisations and platforms as a vehicle.
- Caritas could strengthen its cooperation and partnership with EU level 'think tanks' and academic institutions and seek opportunities to engage them in research of specific themes, nourished by the rich Caritas experience and expertise from around Europe, and culminating in innovative, well researched studies. Such joint academic/Caritas reports could be presented through eye catching moderated panel discussions, timed intelligently to fit the political calendar. Quite apart from the potential for policy impact, such events will also result in improved public profile of Caritas as a competent and versatile actor on the European scene.

"I identify three challenges (but the last one might be more an opportunity):

- CONCORD hasn't yet managed to strategically address Humanitarian issues (although it was part of its mission and statutes) and specifically the link between Relief, Rehabilitation and Development (LRRD) which is a key issue for local communities. In this context, CONCORD would have expected a more 'pro-active/bridging' role from the members that are highly engaging in both areas (Humanitarian and Development). This apparent 'inconsistency' is not limited to Caritas (many other CONCORD members have been keeping the two fields into two different boxes) but in my view, Caritas might have played a more active role in bridging the gap.

- On Development issues/policies (where Caritas has been playing a very positive and active role within CONCORD), there is sometimes an ambiguous perception regarding the relations and synergies between Caritas and CIDSE, especially when it comes to members that are part of both networks.

- Finally, Caritas broad European membership (beyond the borders of the European Union-EU) represents a challenge for CONCORD (and perhaps vice versa). How to be relevant for your member organizations that are not part of the EU? How to provide policy analysis and political leadership which are helpful for them too? How to provide space for them within CONCORD work? Indeed, the engagement of Caritas Europe in the Open Forum on CSO Development Effectiveness was providing (potentially) such opportunities for all your members. This confirms that Caritas active engagement in it was/is a good choice."

Olivier Consolo, Director of CONCORD

1.6 Caritas Europa partnering with the European Commission

Key achievements during the 2007 – 2011 mandate

FROM CONCEPT...

During the years 2006 and 2007 Caritas Europa worked in partnership with the European Commission (EC, DG EMPL) in the framework of the Caritas Europa **CONCEPT** programme, supported by an EC grant. Through this programme, Caritas Europa established and gradually built the capacity and expertise of a 'network within the network' in EU member states of national Caritas experts on the topic of EU social inclusion policies.

During 2006 and within the limits of their possibilities, these experts actively engaged in the national processes in EU member states of shaping the next round of National Strategy Reports 2006-2008 on social protection and social inclusion (NSR/spsi). During the year 2007 they focused mostly on monitoring the implementation of the national strategies.

Caritas Europa commissioned the Von Hügel Institute in the UK to produce an analysis of the governance aspects, quality, coherence and potential effectiveness of the NSR/spsi 2006 – 2008 under the title "European Public Value and the Caritas Social Vision – An Interim Assessment of Europe's National Social Inclusion Strategies". A follow-up report was published one year later, also researched and drawn up by the Von Hügel Institute, this time focusing on the state of implementation of the NSR/spsi 2006-2008.

...TO INCLUSION

Building on the experience and lessons learned of this successful first partnership with the European Commission under CONCEPT, Caritas Europa benefited from PROGRESS co-financing under the **INCLUSION Program** (2008-2010). This allowed us to intensify our European action and outreach. The main objective of the INCLUSION Project was to **increase the capacity of member organisations to influence national social policy making and implementation thereof**, and thus contributing to social progress of Europe as a whole.

Main themes for activities and research within the project included: Integration, social inclusion, and participation in public life of migrant and ethnic minorities; Health and health related social services; A learning and working Europe; and Child poverty.

Policy recommendations reflecting voices from Caritas beneficiaries were formulated on a wide range of social policy themes; evidence based thematic position papers were developed; people experiencing poverty and exclusion were

"I would like to summarise the valuable contributions made by Caritas Europa to our work under the PROGRESS partnership as follows:

- 1. Caritas gave us a lot of value in terms of presence 'on the ground' and outreach into countries, regions and communities throughout the EU. As such, Caritas has incredible potential to disseminate knowledge with regard to European policies in the area of social inclusion and combating poverty and demonstrate how they link to national and regional policies*
- 2. It was impressive to see how Caritas has a very wide and comprehensive overview of the complex and inter-related social policy area in general, complementary to some other, more 'issue-specific' networks*
- 3. Caritas gave an impressive proof of its capability to mobilise its vast network during the 'Zero Poverty' campaign, and we were particularly impressed to see just how many events and campaign activities were carried out throughout Europe, not only in Brussels*
- 4. Last but not least, we observed a consistent high quality and good depth of analysis in the policy contributions that we received from the Caritas Europa Secretariat"*

*Stefano Paci, European Commission DG EMPL,
Secretary to the EU Social Protection Committee*

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listened to and brought into dialogue with (local) policy makers at regular events such as the annual Trans-regional Conference on Social Inclusion.

A strong focus of the INCLUSION program was on capacity building of Caritas policy officers in the EU member states and accession countries, amongst others through the instrument of the annual Summer University. This way we enabled the network to make meaningful contributions to the Europe 2020 strategy and to EU policy documents to be submitted as well as to adequately monitor the implementation of National Action Plans.

An external evaluation of the three years of INCLUSION was conducted in December 2010. It revealed that member organisations which actively participated and invested in the activities organised by the network had gained important new experiences and had substantially increased their capacities and knowledge regarding EU social policy processes. Furthermore, the INCLUSION Project has contributed to the improvement of the organisational capacities and the functioning of the network as a whole: New dynamics have been created, and member organisations identify themselves more with the Caritas Europa network. The network as a whole is now also better known and has gained importantly in terms of visibility and credibility among political decision makers, civil society and the general public.

Challenges during the 2007 – 2011 mandate

"In our partnership with large, well established EU social networks like Caritas, the European Commission sometimes faces the challenge of achieving good and workable synergy and alignment between the 'traditional' priorities and objectives of the networks and the more 'politically inspired' priorities and objectives of the European Commission."

Stefano Paci, European Commission DG EMPL,
Secretary to the EU Social Protection Committee

A persistent challenge was the full engagement of all relevant member organisations in the program. Some member organisations which do NOT have domestic activities were difficult to 'mobilise' in the context of INCLUSION. In some cases, we needed to find alternative partners, other than the traditional Caritas member. A number of Caritas organisations in the new EU member states (2004-2007 accession) participated only partly or not at all in the CONCEPT and INCLUSION Programs. We could and should have been a 'network of 27' but at the best of times we were only a 'network of 20' (and quite honestly, even less most of the time...)

Language was another challenge. Most of the 'daily business' interaction in the context of INCLUSION program was generally conducted in English, a language which we cannot always expect to be understood and spoken by those expert persons in the network that we were trying to reach and engage with. Additionally, 'EU jargon' is rather complex language in its own right.

For some non-EU member organisations that wished to participate in CONCEPT and INCLUSION activities, we faced the additional challenge of financing the cost of their participation, which in many cases was not eligible for EU co-financing under PROGRESS.

Caritas Europa created an important benchmarking instrument for social policies at national level, the 'List of Principles for a sustainable social system'. In spite of being available in many languages, this powerful instrument was not used sufficiently and widely enough as a powerful tool to assess public social policies.

An important point revealed by the external project evaluation is the **lack of a strategy to involve people experiencing poverty (PEP) in our advocacy work**. It remains very difficult to develop a true 'chain of participation', beginning at the local level and connecting to the regional and national levels so that the voice of PEP is clearly heard at European level, which remains very far removed from the daily world PEP are living in.

1.7 Caritas Europa managing its internal organisation

Key achievements during the 2007 – 2011 mandate

As a key achievement in terms of management of the internal organisation of Caritas Europa we would like to mention the **relative stability of the team in the Secretariat**. Compared to the often rapid and high staff turnover in other comparable organisations in Brussels, or indeed to the situation of Caritas Europa itself in the past, the team of Caritas Europa has been relatively stable in composition throughout the 2007-2011 mandate and this has certainly contributed to continuity in the work and considerably increased knowledge and expertise in the team.

As testified by the annual reports of external and internal auditors, the management of financial administration has continuously become more professional, efficient and transparent. The almost entirely 'clean' audit carried out by the European Commission over the second year of the CONCEPT program confirmed that positive assessment. With the exception of a few fairly insignificant remarks, the European Commission auditors complimented Caritas Europa on the overall quality and transparency of its financial administration and reporting on the EU funded program.

At the initiative of the Treasurer for the mandate 2007-2011, Paulo Beccegato of Caritas Italy, Caritas Europa examined and rearranged the investment of its reserves and ensured that these reserves were reinvested as much as possible in ethically sound investment portfolios.

During this mandate, the Financial Administrative Team (FAT) evolved from an informal 'sounding board' function for the management on certain financial, administrative and human resources related issues to a structured meeting place of governance and management on these issues.

Caritas Europa enjoyed continued excellent cooperation and working relationship with the external auditor, Commissioner of the association, Mr. Emiel Desmedt, who has consistently demonstrated to be a valuable and highly expert counsellor to the management team of Caritas Europa on many management related issues. In spite of the positive evaluation of this cooperation, however, the Executive Board decided in 2010, after 9 years of collaboration with Mr. Desmedt, to select and engage another partner (KPMG) as external auditor for the next couple of years.

Challenges during the 2007 – 2011 mandate

Although it was a welcome development that the role of the FAT evolved from an informal and occasional advisory encounter to a regular and structured space for interaction between governance and management levels of Caritas, in reality it proved quite challenging to organise the appropriate interaction and to adequately prepare for and follow up on the discussions and decisions in the FAT. The kind of interaction that should take place in the FAT, especially when discussing complex financial spreadsheets or delicate personnel issues, is not most suitable to be done in a 'virtual' way, i.e. by telephone or by Skype. There were not enough opportunities for proper face to face discussion, and too often this was 'relegated' to half an hour or so before the beginning of the Board meetings. This more or less defeats the purpose of the FAT, namely a governance/management interaction space where financial or human resources related issues can be dealt with discretely in preparation for and well in advance of Board meetings. As a result, the FAT has been less effective as a governance and management interaction space than it could and should have been.

Section 2.

Annual Activity report 2010

2.1 Strategic Priority “0” – ‘Zero Poverty’ and EY 2010

A **massive number and variety of activities** took place throughout the Caritas network in 2010 in the context of the European Year 2010 for Combating Poverty and Social Exclusion. There were sponsored runs, publicly televised concerts, million candle campaigns, a visit by the Holy Father to a Caritas hostel in Rome, Caritas stands at fairs, even a specially composed campaign song (thank you, Caritas Malta, for this wonderful idea!), in short too much to even begin to summarise. Any attempt at summarising this on 1-2 pages would simply not do justice at all to the enthusiastic and committed engagement by so many thousands of Caritas people in the parishes, dioceses and national organisations from Portugal to Estonia and from the UK to Armenia and all places in between

This is why first and foremost we wish to refer the reader of this report to the **‘Book of the Year’**, sent to you separately in PDF format as an annex to this report. It can also be directly downloaded from the website: http://www.caritas-europa.org/module/FileLib/BookoftheYear_light.pdf. The ‘Book of the year’ is already a summary of the literally hundreds of actions developed by thousands of people in the network at various times throughout this intensive campaign year, which was without a doubt one of the ‘finest moments’ of Caritas Europa in recent history.

ZERO POVERTY was the **first ever joint campaign of Caritas in Europe, initiated by Caritas Europa but ‘carried’ by the member organisations**. The campaign opened with a successful opening event in the European Parliament in January 2010 and closed with a panel debate in the premises of the European Policy Centre in December. A special moment was the formal handing over by EY2010 EU-level Ambassador Lesley-Anne Knight of boxes containing 135.498 Zero Poverty petition signatures to the Belgian EU Presidency during the EU-organised closing event. These were the signatures collected prior to mid-December. In the weeks following this EU closing event we still kept receiving more signatures and the final tally increased to 171.294 signatures.

During the last meeting of the EY2010 task force, we tried to formulate the successes and positive impacts of the ZERO POVERTY campaign and came up with the following:

- **Our political messages**, contained in the petition, have in the course of the year **all been taken up in the EU Agenda in one way or the other**. This means that we have proved to be right on the spot when identifying the important social priorities in Europe which are our priorities too. (Child poverty, social protection and inclusion – minimum income, social services and decent work for all);
- We have managed to acquire **recognition as a vast active European network** with knowledge of EU social policies and we have enjoyed **good visibility** of Caritas Europa when invited to participate in EU events. Caritas Europa was the European network with the largest European geographical coverage and outreach that participated in the EY 2010 with a joint campaign;
- With ZERO POVERTY we managed to **underline the importance of the European Union in the fight against poverty in Europe** and the **understanding of EU social policy making** in the network was further improved;
- With ZERO POVERTY activities being implemented **beyond the EU borders**, ZERO POVERTY was known outside the EU: our **MO in countries outside of the EU have emerged as important actors**;
- Through our common campaign with shared messages we have managed to create a **momentum of strong joint action**. It is important that we keep up this way of working: Joint action by Caritas in Europe, together for the same cause.
- **Participation** has been a key word in ZERO POVERTY, if not always easy to involve the people we are working for in our actions, there have been a number of good practices and it is important that we continue to underline the importance of participation.

2.2 Strategic Priority I – Social Inclusion and Social Cohesion

Below is a **summary of the highlights of Caritas Europa actions and achievements** in this area of work during 2010:

- The **European Congress on Poverty and Social Exclusion** (Madrid, 4-5 June) registered a high level of attendance and media coverage in Spain. It painted a picture of poverty today and of the Caritas action in Europe and in the world. It presented the Caritas policy proposals at national and EU level for the next decade. The value of Caritas as a key partner of public decision-makers stood out with precious gains in terms of visibility, both towards the EU and the Council of Europe.
- **Publications:** based on “Poverty Among Us”, opening “Zero Poverty” with a study of the causes and characteristics of poverty throughout the life-cycle, thematic papers were written by Caritas experts: “Invisible Borders – a barrier to inclusion” (on migration and poverty), “Child Poverty – Navigating safe passage through the labyrinth of poverty”, “A learning and working Europe”. These publications consolidate the Caritas understanding of poverty and provide a basis for advocacy at all levels.
- **Ecumenical reflection on poverty** was also carried out in partnership with Eurodiaconia, KEK-CEC and COMECE, culminating in the publication “Do not deny justice to your poor people” and in an ecumenical conference (European Parliament, 30 September). Besides profiling Church organisations as major actors in the fight against poverty, this work rose awareness of policy-makers about the need for greater social justice and ethical engagement in Europe.
- **Key events in 2010:**
 - **Capacity building seminar on HIV/AIDS:** Seminar on HIV/AIDS entitled “Helping People Living With or Affected By HIV and AIDS” took place in Sofia (Bulgaria) on 15-16 March 2010. The Seminar, which was financed with the help of Renovabis, brought together Caritas HIV/AIDS experts from Ukraine, Russia, Albania, Georgia, Armenia and Italy. The main goal of the seminar was to explore how the HIV/AIDS realities can be mainstreamed into Caritas programmes and projects which are currently being carried out by Caritas and Church and deal directly or indirectly with people leaving with or affected by HIV/AIDS.
 - **Summer University:** The 2010 edition of the Summer University (12-16 July, Leuven) was organised in cooperation with Caritas Vlaanderen Belgium and Leuven University. Participants came from Caritas Belgium, Croatia, France, Italy, Lithuania, Luxemburg, Malta, Portugal, Romania and Slovakia and for the first time from Bulgaria and the Netherlands. The programme was balance between lectures and group work, around Active Inclusion, Employment issues and Life Long Learning, Migration, Child Poverty with a focus on the Belgian Presidency of the EU participation members of Belgian government. The group work evolved around volunteering (a strategy for Caritas Europa to present to the EU Commission for financing).
 - **Home Care Forum:** The Forum entitled “*Is Home Care Fighting Poverty?*” was hosted by Caritas Lithuania on 6-8 September in Vilnius. Good participation by mostly Eastern European countries who were very pleased with this occasion to connect with and learn from each other.
 - **Trans-regional Conference on Social Inclusion:** The conference entitled “*Overall human dignity, in the whole cycle of life*” was hosted by Caritas Trieste on 16-18 September. Participants: beneficiaries and staff of the diocesan Caritas from Rijeka (Croatia) Steiermark, Carinthia and Tirol (Austria); Gorizia, Trieste, Udine, Bolzano and Pordenone (Italy) and Koper (Slovenia).

2.3 Strategic Priority II – Migration, Asylum, Integration & Anti-Trafficking

Below is a **summary of the highlights of Caritas Europa actions and achievements** in this area of work during 2010:

- Caritas Europa met the cabinet of EU Commissioner Malmström for an exchange on the Commissioner's priorities related to migration and asylum in the EC action plan to implement the Stockholm Programme (March 2010).
- Caritas Europa organised a seminar for its member organisations from Ukraine, Georgia, Armenia, Azerbaijan, Moldova and Russia on the EU Eastern Partnership initiative, aimed at informing the members about the initiative and at increasing their involvement in the related consultation process with civil society (March 2010).
- In collaboration with Caritas Internationalis, CCME, ECRE and UNHCR, Caritas Europa organised a side-event on resettlement at the 2010 UNHCR Annual Consultations in Geneva (June 2010).
- Caritas Europa participated in the EU ministerial conference on integration, as representative of the European Integration Forum. (April 2010).
- Caritas Europa organised a training seminar on domestic workers' rights. Among the speakers was a member from the European Parliament, the International Labour Organisation, the Office of the High Commissioner of Human Rights, and the Organisation for Security and Cooperation in Europe. Issues discussed included trafficking for the purposes of domestic servitude, national and international actions and campaigns, and the upcoming Convention and Resolution on Migrant Domestic Workers at the ILO (June 2010).
- Caritas Europa published the "invisible barriers" paper on barriers to social inclusion of migrants, in the frame of the European Year against Poverty (June 2010).
- Caritas Europa organized a Migration Study Visit in Paris, in cooperation with Secours Catholique, with participants from 19 member organisations. It included a number of visits and lectures. We visited the immigration museum, the CEDRE and Cite Notre Dame. One day was spent in Calais, where the issue of undocumented migrants was discussed. European migrant integration policy was also debated. The participants from the MSV were also present for a Secours Catholique event held at the Maison de l'Europe on migration and development (June 2010).
- Caritas Europa contributed to the European Integration Forum, presenting the EU CSO expectations for the new EU agenda for the integration of migrants (June 2010).
- Caritas Europa, together with the other Christian Group members, published a comments paper to the European Commission proposal to amend the asylum procedures' and qualification directives (June 2010).
- Caritas Europa organised a meeting for the Caritas of the Nordic-Baltic Sea Region, in order to enhance cooperation in the region in the area of integration of migrants (September 2010).
- Caritas Europa participated in the Senior Officials Meeting, preparing the Africa-EU partnership agreement on Migration, Mobility and Employment. Caritas Europa, invited as observer, stressed the priority to be given to protection of migrant workers' rights, over economic and political considerations (September 2010).
- Caritas Europa contributed to and participated in the Caritas International Forum on women and migration (December 2010).

2.4 Strategic Priorities III & IV (combined) – International Cooperation

Below is a **summary of the highlights of Caritas Europa actions and achievements** in this area of work during 2010:

- A Caritas/CIDSE Co-financing Forum was organised in Brussels to discuss with Commission members and partners from the South the future of the EU development policy within the framework of the EU Structured Dialogue Process.
- Caritas Europa, as a direct result of the Mid-term Review has assumed new responsibilities in emergency coordination and is now taking an active role in the coordination of small and medium scale disasters in the region of Europe. In 2010, the Caritas Europa Secretariat has coordinated responses to 12 emergencies occurring on the territory of Europe, including the response to the floods in Albania, Poland, Czech Republic, Romania and the forest fires in Russia.
- In order to assume this new role in emergency response, a mechanism was drawn up based on best practices and lessons learned with a focus on cross-border collaboration of member organisations that are sharing the same kind of exposure to a given hazard. In the region of South Eastern Europe such a group has been formed with the initial support of Caritas Germany. The group, which today is self-managing, carries out an interesting project of community-based Disaster Risk Reduction in pre-identified communities in Albania, Bulgaria, Kosovo, Serbia, and Romania. Caritas Romania has taken the lead in this project but is assisted by Caritas Europa in a variety of ways. These are ranging from advice in project design and providing visibility, to facilitating access to funding and engaging in capacity building activities.
- The Caritas Europa system of coordination for project applications submitted to ECHO was reviewed and improved. This includes the running of a project database from 2003 onwards. The database, which contains all applications to ECHO submitted by member organisations as well as a list of field offices of European Caritas organisations, serves as the main tool for pro-active coordination among members prior to their individual project application. The list is updated by Caritas Europa on a quarterly basis.
- Caritas participated in the ECHO Partners Conference in 2010 with 9 member organisations out of the 11 that are currently holding a contract with the European Commission's Humanitarian Aid Office (ECHO), and was active and visible in the debates. In one of the working sessions, Trocaire, Caritas Ireland, presented some reflections on the UN Cluster system, jointly with the International Federation of Red Cross and Red Crescent Societies (IFRC).
- A wide range of Policy Papers on EU Development Policy, the Millennium Development Goals, Disaster Risk Reduction, Food Security, the Common Agricultural Policy, and External Action Funding were developed and follow-up action undertaken with key decision-makers in the Parliament and the Commission.
- Caritas Europa contributed to the Spotlight Report of Concord on Policy Coherence for Development in writing the chapter on Migration and Development.

2.5 Strategic Priority V – Strengthening the network and supporting members

Below is a **summary of the highlights of Caritas Europa actions and achievements** in this area of work during 2010:

Common Management Standards (CMS):

After adoption of the CMS during the Regional Conference of 2009, the period up to the Regional Conference of 2010 in El Escorial was used to encourage member organisations to ratify the CMS within their own governance structures and sign up for the peer review system and to accompany them in this process. In order to help member organisations assess their state of compliance with the CMS at the moment of ratification, Caritas Europa made available a simple self assessment tool and a form in which the ratification could be officially recorded and some key organizational data were communicated.

This resulted in 20 member organisations confirming the ratification before the Regional Conference 2010. Also after this Conference, Caritas Europa remained in close contact with members in order to encourage them to ratify the CMS.

During the Regional Conference in El Escorial, Caritas Europa organized a lottery among the 20 member organisations that, by that time had ratified the CMS in order to establish the pairings of members for the peer review system

European Solidarity Fund (ESF):

During the early months of 2010, the ESF Committee invested considerable effort and creativity in completely redesigning, expanding and automating the ESF application forms 'package'. This redesigning took place in close consultation with representatives of ESF applicant member organisations. Before disseminating the new application package to all ESF applicants, two ESF applicant MOs volunteered to test the forms for accuracy, logic and consistency. As a result of this participative process, the new ESF application package has become a valuable financial planning and reporting tool for ESF applicant members. Due to its comprehensive approach it has greatly increased the transparency of the application and financial reporting in the context of the ESF. The fact that the new financial information package allows for direct comparison of financial data over a period of three consecutive years allows the ESF applicant member organisation as well as the members of the ESF Committee to identify specific trends or anomalies.

The ESF committee also reached agreement with ESF applicant member organisations that as of 2011 it would be an obligation to submit audit reports as integral part of their future ESF applications. It must be able to directly reconcile data in these audit reports with data in the ESF application package. This new obligation will further enhance the transparency of the financial information supplied, and thus allow for good stewardship of resources.

In 2010 we also observed that the total amount of ESF support applied for had decreased substantially, indicating that there is a trend among ESF supported member organisations to decrease their dependency on ESF support and work towards a 'graduation' from the ESF system, although the 'calendar' for this will be different for different members. At the same time we observed a sharp decrease of the total amount of ESF support made available by donors.

In March 2010 the ESF Committee organized an ESF workshop that aimed to understand the importance of the financial management in small and big organisations in coherence with the CMS. This workshop also featured training in financial management.

2.6 Strategic Priority VI – Communications and external action

Below is a **summary of the highlights of Caritas Europa actions and achievements** in this area of work during 2010:

Most activities in 2010 in the field of communications were related to the European Year 2010 for Combating Poverty and Social Exclusion and the Caritas Europa Zero Poverty campaign. Please see also the section of this report on EY2010 and 'Zero Poverty'. With regard to involvement of Caritas Europa communications staff, we wish to mention just a few highlights:

- The launch of the campaign took place in the European Parliament and attracted the presence and participation of many members of European Parliament (MEPs).
- Over 171,000 signatures were collected across Europe for the 'Zero Poverty' petition, and over 135,000 were handed over to the Belgian EU Presidency during the closing conference of the EY2011.
- The communications team was intensively involved in the design, production, publication and dissemination of the various studies, papers and reports that were prepared in the context of EY2010 and 'Zero Poverty'.
- Member organisations underlined at multiple occasions that they found the Zero Poverty campaign an excellent instrument for strengthening the feeling of belonging to a large, pan-European network.
- The communications team was involved in organising a round table in the premises of the European Policy Centre at the occasion of the closing of the Zero Poverty campaign. A discussion panel was composed of representatives of the European Commission, the Belgian EU Presidency, the Committee of the Regions and Caritas Europa Secretary General Jorge Nuño Mayer.
- Halfway through the EY2010 year, Caritas Europa also substantially reviewed the layout, look and logic of the Zero Poverty website, which had been designed by an external service provider in Austria. According to analytics this review process has had considerable positive impact in the percentage of petition signatures collected. Before this revision of the website, the ratio of signatures collected from unique visitors to the Zero Poverty website was 33.5%. After the revision, this ratio jumped to no less than 91.7%

Caritas Europa issued 18 press releases during the year 2010 (Please see the website for details: <http://www.caritas-europa.org/code/EN/releases.asp>)

Following the arrival of the new Secretary General, a blog section was introduced on the website as a direct communication channel for the Secretary General, thus giving a recognisable public face to Caritas Europa.

Caritas Europa continued its partnership with Euractiv, the multilingual multination EU portal, where we have run two online publicity campaigns:

- On Europe 2020 (<http://www.caritas-europa.org/code/EN/advo.asp?Page=1098>)
- A call for continuing to work towards Zero Poverty in the occasion of the closing of EY2010 (<http://www.caritas-europa.org/code/EN/soci.asp?Page=1123>)

The communications team invested in improving partnership with the European Policy Centre (EPC), a leading think tank in Brussels. This has led amongst others to the opportunity to organise the closing round table for our Zero Poverty campaign in the premises of EPC and with a senior EPC policy analyst moderating the event.

Alternative communication channels through Facebook and Twitter are continuously growing and becoming increasingly relevant for our external and internal communications.

2.7 Succession in the post of Secretary General

Caritas Europa's Regional Conference in El Escorial ratified Jorge Nuño Mayer as the new Secretary General for the period 2011-2015. In the frame of an Executive Board meeting on September 30 the handover between the outgoing Secretary General, Marius Wanders, and the incoming Secretary General took place.

Jorge Nuño Mayer started his mandate with a strategic planning process. A new Strategic Framework needs a broad consensus in the European Caritas family. Thus, from the very beginning the PARTICIPATION of Caritas member organisations has been crucial for the success of the whole process. Nearly all Caritas in Europe have contributed to the first phase, evaluation and SWOT analysis, by completing a set of questionnaires. Many experts from our network, collaborating in the different commissions and working groups have also been involved and have contributed. A steering group, with representatives from member organisations, and the team of the Secretariat in Brussels have supported this process.

The whole Caritas Europa Secretariat team had a retreat meeting allowing to get to know each other better and to plan the future challenges together.

In order to establish close contact with member organisations and to know their needs, Jorge Nuño Mayer visited Caritas organisations in Armenia, Czech Republic, Germany, Belgium, Italy and Slovenia during the first three months of his mandate. He held working meetings with directors of Caritas Bosnia Herzegovina, Caritas Russia, Caritas Austria, Secours Catholique, Caritas Spain and Caritas Albania.

While participating in the Spiritual Retreat organized by Cor Unum –with the support of Caritas Poland- in Czestochowa, Jorge met several Caritas Directors and the bishops responsible for Caritas of Poland, Italy and Spain. Introductions to the presidents of the Pontifical Council Cor Unum: H.E. Cardinal Joseph Cordes and the incoming president H.E. Cardinal Robert Sarah were also arranged.

Caritas Internationalis organized an intensive meeting which allowed to become acquainted with the work of the Secretariat in Rome. The opportunity was also seized to participate in the Executive Committee, which introduced the new Secretary General of Caritas Europa to the other regional coordinators of Caritas in the world.

Similarly, a number of get-to-know visits introduced Jorge Nuño Mayer to relevant stakeholders in COMECE, the European Parliament, the European Commission, European NGO networks, European Trade Unions, and others.

Section 3.

Looking ahead to the mandate 2011 - 2015

3.1 The Changes in our World are Challenges for Caritas

The encyclical letter *Caritas in Veritate* gives us an excellent analysis which will, for sure remain valid for the next decade. Our world is changing: even before the financial and economic crisis we were facing a global food crisis and an energy and environmental crisis. These crises are only a consequence of a deeper social crisis which has arisen the last decade, generating more inequality and poverty in south and north, in east and west; a global process of change affecting not only the economic relations but also the social structures. In addition, in Europe we are facing a demographic and cultural challenge with low birth rates, aging and (needed but feared) migration. An economic paradigm, where growth is the only and absolute value, is not only maintained by economic and political interests, but by values that are starting to root in the whole society. The values of “the other”, “common good”, and “social cohesion” are losing ground, while individualism, price and market are becoming untouchable. Even the fight against poverty is becoming a function linked to economic growth; social inclusion is no longer a value “per se”, but it becomes an adjective: “inclusive growth”. This way of globalisation is excluding large parts of humanity; human rights are not enforceable; social welfare states are weakening; vulnerability is increasing... A crisis that does not know about frontiers; a globally interlinked process. In Caritas we know it because the people who suffer the consequences are arriving in our parishes and social services. In these times of change we can not stop attending to these people in need, this is our first and primary action, but we must also influence the decision makers and the whole society with the need for values: gratuitousness, solidarity, community, love, hope, and logic of gift...caritas... the relational values. Advocacy is a key challenge.

More and more disasters in the world, also in Europe, are generating suffering among people, often those already hit by poverty. Manmade disasters and armed conflicts, environmental and climate disasters are growing in number and intensity. Caritas has been there in the last decades and will continue to be there in future. But how can we be better prepared, more efficient in our humanitarian action and better coordinate the efforts to better help people? How can we learn from our mistakes and promote the best practices in our European and global network? Herein lies another key challenge for the future.

And we know about our strengths and weaknesses as a network of institutions. Being Church with the treasure of the Catholic Social Teaching, we have the best arguments for everything we do. Caritas, its professional volunteers and employees, generate an incredibly valuable knowledge in every country and diocese, in most projects and services by analysing the reality and by tackling the situations of people, families and communities in poverty. People experiencing poverty know what they need and what is good for them. How can all this social capital be interlinked so that the whole network can benefit from it? How can Caritas people feel part of a communion? Economic cutbacks and difficulties are showing that member organisations, often governance and management levels, are not developed enough to tackle difficult situations. Caritas has created good instruments in Europe during the last years, like the Common Management Standards and the European Solidarity Fund, which can support the institutional development. An institutional development that only makes sense if it will serve the people in need better. How can we have sustainably performing Caritas organisations in Europe?

3.2 The new Strategic Framework 2011-2020

The strategic planning process took nearly eight months. Hundreds of experts from Caritas organisations in Europe, commissions and working groups, presidents, directors and secretary generals, the Executive Board and external experts like theologians and organisational consultants discussed what should be the priorities for Caritas Europa and how these priorities should be implemented. It has been a fruitful process.

Three priority functions have crystallized as the challenges in which Caritas in Europe should invest jointly its resources: (1) advocacy, (2) humanitarian coordination and learning and (3) strengthening the network. Different goals and outcomes define what we want to achieve all together in this challenging world and time.

The Caritas Europa Secretariat in Brussels will be there to serve and support the Caritas organisations in Europe, to facilitate and catalyze the common expectations.

During the Regional Conference 2011 in Rome we will have the opportunity to get to know this Strategic Framework in detail and discuss and commit ourselves and our organisations to its goals.

These few lines about the starting mandate 2011-2015 are only an introduction, as the mandate 2011-2015 has to be written in a common effort of all European Caritas Organisations.

ANNEX 1: SECRETARIAT - HUMAN AND TECHNICAL RESOURCES

Personnel formation - Overview on 01 May 2011

Function	Name	Nat.	Location	Hrs/wk	FTE	Telephone	E-mail address
General Secretariat staff							
Secretary General	Jorge Nuño Mayer	SP/D	Brussels	37,5 (full time)	1,0	+32-2-235.03.92	jnunomayer@caritas-europa.org
Office Manager	Patricia Debeer	B	Brussels CE Office	37,5 (full time)	1,0	+32-2-235.03.91	pdebeer@caritas-europa.org
Secretary	Godelive Kankindi	B	Brussels CE Office	37,5 (full time)	1,0	+32-2-235.03.90	gkankindi@caritas-europa.org
Staff for Strategic Priority I: Social Inclusion & Social Cohesion							
Senior Officer for Social Policy	Adriana Opromolla	I	Brussels CE Office	37,5 (full time)	1,0	+32-2-235.26.52	aopromolla@caritas-europa.org
Staff Officer for Social Policy	Natalya Kaval Kova	B	Brussels CE Office	37,5 (full time)	1,0	+32-2-235.03.97	nkavalkova@caritas-europa.org
Project Manager for INCLUSION and EY 2010	Miriam Pikaar	NL/UK	Brussels CE Office	37,5 (full time)	1,0	+32-2-235.03.99	mpikaar@caritas-europa.org
Staff for Strategic Priority II: Migration, Asylum, Anti-trafficking and Integration							
Migration Officer	Peter Verhaeghe	B	Brussels CE Office	37,5 (full time)	1,0	+32-2-235.03.96	pverhaeghe@caritas-europa.org
Assistant Migration Officer	Paulina Banas	PL	Brussels CE Office	18,75 (part time)	0,5	+32-2-235.03.96	pbanas@caritas-europa.org
Staff for Priorities III & IV: Humanitarian Aid, International Development & Peace							
Int'l Coop. Officer (DEV)	Blandine Bouniol (on maternity leave)	F	Brussels CE Office	37,5 (full time)	1,0	+32-2-235.26.55	bbouniol@caritas-europa.org
Int'l Coop. Officer (DEV)	Francesca Manchi (ad interim)	I	Brussels CE Office	37,5 (full time)	1,0	+32-2-235.26.55	fmanchi@caritas-europa.org
Int'l Coop. Officer (HUM)	Harald Happel	D	Brussels CE Office	37,5 (full time)	1,0	+32-2-235.03.93	hhappel@caritas-europa.org
Staff for Priorities V & VI: Support to member organisations & internal networking; Advocacy, Communications, External Networking and Theological Reflection							
Staff Officer Internal Network	Annamaria Vrzackova	HUN	Prague	37,5 (full time)	1,0	+ 420-603-87.38.28	avrzackova@caritas-europa.org
Web editor	Alain Rodriguez Garcia	SWE/SP	Brussels CE Office	25 (part time)	0,67	+32-2-235.03.54	arodriguez@caritas-europa.org

Team 'statistics' on 01 May 2011

The CE Secretariat team consists of **12 persons (8 women and 4 men)**, not counting interns. Together these 12 persons represent a capacity of **11.17 Full Time Equivalent (FTE)**. The team brings together **10 nationalities**. Caritas Europa **directly employs 11** of these team members, while **1 member** of the team is **formally employed by Caritas Czech Republic** but works exclusively for Caritas Europa.

