



Peer Review in Social Protection and Social Inclusion and Assessment in Social Inclusion

www.peer-review-social-inclusion.eu

Operational Guide – Network of independent experts



On behalf of the
European Commission
DG Employment, Social Affairs and Inclusion



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Introduction

On 2 July 2008 an ambitious agenda was adopted by the European Commission in order to ensure that European Union policies respond effectively to today's economic and social challenges. The renewed social agenda (2008-2010)¹ aims to create more opportunities for EU citizens, improve access to quality services and demonstrate solidarity with those who are affected negatively by change. Its implementation relies on a combination of instruments including EU legislation, social dialogue, cooperation between Member States, as well as financial support, mainly from the EU's Structural Funds, the European Globalisation Adjustment Fund and the PROGRESS Programme on employment and social solidarity.

The overall aim of PROGRESS² is to financially support the implementation of the objectives of the European Union in employment, social affairs and equal opportunities, as set out in the Social Agenda. It will thereby also contribute to the achievement of the EU 'Lisbon' Growth and Jobs Strategy.³ Section two of the Programme shall support the implementation of the OMC in the field of social protection and inclusion by:

- a) improving the understanding of social exclusion and poverty issues, social protection and inclusion policies, in particular through analysis and studies and the development of statistics and common indicators, within the framework of the OMC in the field of social protection and inclusion;
- b) monitoring and evaluating the implementation of the OMC in the field of social protection and inclusion and its impact at national and Community level as well as analysing the interaction between this OMC and other policy areas;
- c) organising exchanges on policies, good practice and innovative approaches and promoting mutual learning in the context of the social protection and inclusion strategy;
- d) raising awareness, disseminating information and promoting the debate about the key challenges and policy issues raised in the context of the Community coordination process in the field of social protection and inclusion, including among the social partners, regional and local actors, NGOs and other stakeholders;
- e) developing the capacity of key European level networks to support and further develop Community policy goals and strategies on social protection and inclusion;

The Commission is responsible for implementing the programme under the supervision of a Programme Committee made up of national representatives.

In order to assist the Commission services and Member States in carrying out a voluntary mutual learning process through a Peer Review methodology, the Commission manages a **Peer Review in Social Protection and Social Inclusion sub-programme**. This programme, originally

¹ For more information on the renewed social agenda see:

<http://ec.europa.eu/social/main.jsp?catId=547&langId=en>

² For more information on the PROGRESS programme see:

http://ec.europa.eu/employment_social/progress/index_en.html

³ On the Growth and Jobs Strategy see: http://ec.europa.eu/growthandjobs/index_en.htm

launched in 2004, contributes to the dissemination and identification of good practice on the basis of a systematic exchange of experiences and evaluation of policies, actions, programmes or institutional arrangements taking place in seminars hosted by individual Member States.⁴

In order to assist the Commission in monitoring and evaluating the implementation of the National Action Plans on Inclusion (NAPsIncl), i.e. the social inclusion section of the National Reports on Strategies for Social Protection and Social Inclusion (NRSSPSI), the Commission also manages an **Assessment sub-programme**. In the context of this sub-programme a **Network of Independent Social Inclusion Experts** was set up. Originally, in December 2002, the Network included experts from 15 countries. Now it includes experts from all 27 Member States as well as from Croatia, the Former Yugoslav Republic of Macedonia, Serbia, Turkey and Iceland. The members of the network have produced a series of reports on the implementation of the NAPs/Inclusion as well as on new policy developments or key trends. They work bilaterally with DG Employment, Social Affairs and Equal Opportunities on other related issues.⁵

ÖSB Consulting (Austria), with its partners CEPS/INSTEAD (Luxembourg), The Institute for Employment Studies (United Kingdom) and Applica (Belgium) (hereafter ÖSB/C-I/IES/Applica), have been selected through a public tendering process to provide support services to DG Employment, Social Affairs and Equal Opportunities for the joint management of the Network of independent experts and the Peer Reviews. Close collaboration with all countries involved in the programme will be essential for its success.

⁴ For more information on the Peer Reviews please visit: <http://www.peer-review-social-inclusion.eu/peer-reviews>

⁵ For more information on the Network please visit: <http://www.peer-review-social-inclusion.eu/network-of-independent-experts>

The Network of Independent Experts on Social Inclusion

The Commission's independent experts have already gathered a considerable amount of knowledge and experience. In close consultation with the European Commission, ÖSB/C-I/IES/Applica coordinates the activities of the Network of independent social inclusion experts, and processes their contributions into regular reports as well as written publications for the Commission and/or a public website.

Objectives of the Network activities

The Network of non-governmental social inclusion experts assesses and monitors national policies so as to provide DG Employment, Social Affairs and Equal Opportunities (DG EMPL) with up-to-date information and independent analyses on each country. It also draws on the country reports to provide the Commission with overviews and analyses of trends and policy developments in relation to poverty and social exclusion across the EU as well as ongoing assessments of the impact of the EU *Social Inclusion Process* and suggestions for its further strengthening.

Overview of the Network activities

The Network of independent social inclusion experts currently includes experts from 32 countries: the 27 EU Member States as well as Croatia, the Former Yugoslav Republic of Macedonia, the Republic of Serbia, Turkey and Iceland.

The independent social inclusion experts will maintain access to all relevant public documentation at national level and will provide regular information covering both social policy and labour market developments. Their contributions will take the form of general periodic reviews on their respective countries, cross-country thematic reviews, surveys of innovative practices, and independent policy assessments. More in particular, the experts will provide information and expert assessment on any significant development in the socio-economic context and in the legislative framework. Analyses of the actual implementation of National Action Plans for Social Inclusion at both national and local level are also expected. Budgetary allocations that are relevant to the fight against poverty and social exclusion and the promotion of social inclusion should also be taken in due consideration and reported upon. An integral part of the experts' tasks will be the assessment of the interaction between social policies and the Lisbon Strategy. This includes assessing the contribution that the activities carried out in the framework of the Open Method of Coordination (OMC) will bring to the implementation of the revised Lisbon strategy as well as an assessment of how the objectives of the Lisbon strategy can serve social cohesion.

For carrying out their work, the Commission facilitates their access to contact points in the national ministries and other key partners. It will also keep ÖSB/C-I/IES/Applica informed about relevant developments in Community policy with regard to social inclusion and social protection issues.

1. Reports

Three times a year, the independent social inclusion experts will provide a report on their respective countries. The specific subject matter of the reports will vary according to the annual work programme of the EU's Social OMC and the needs of the European Commission. The reports can cover:

- updates on national trends and policy developments which are deemed relevant in the context of the EU policy coordination process on social inclusion including monitoring reports on the impact of the economic and financial crisis;
- independent assessments of the social inclusion strand of the Social OMC, i.e. the National Action Plans on Poverty and Social Exclusion (NAPs/inclusion) - for experts from non Member States assessments can be of an equivalent policy document (e.g. the follow-up report for the "Joint Inclusion Memorandum"). These assessments are only for use within the Commission (not for publication).
- detailed reports on specific topics relevant to the EU Social Inclusion Process such as active inclusion, child poverty and social exclusion, minimum income, housing exclusion and homelessness, and migration and social exclusion.
- assessments of the National Reform Programmes (Lisbon Strategy) from the angle of social inclusion.

The reports will be based on official policy communications, statistics, studies and surveys in the public domain, interviews with relevant stakeholders, press information etc.

After the assessments, ÖSB/C-I/IES/Applica will provide its own global conclusions to the Commission, notably on the methodology of the work carried out, for future annual exercises.

ÖSB/C-I/IES/Applica will ensure that the reports meet the requirements of the Commission and adhere, as far as possible, to a common outline. ÖSB/C-I/IES/Applica will transmit the national reports to the Commission with a 'synthesis report' in English. These synthesis reports will provide a clear and objective presentation of the various national inputs as well as a significant 'EU added value'.

After consultation of the Member States some of the reports may be published on the Social Inclusion website.

2. Ad hoc requests

The independent social inclusion experts may be called to assist the Commission with short-term research and information, complementing the information presented in the NAPs/Inclusion' assessment or other reports.