



Editorial by Odile Quintin, Director General

The Social Inclusion Peer Review: a New Impetus to the Open Method of Coordination

Tackling poverty and social exclusion is now well established as a strategic priority of the European Union since the European Council of Lisbon in March 2000 endorsed the Open Method of Coordination on social inclusion (OMC) with the aim of making a decisive impact on the eradication of poverty and social exclusion by 2010. The OMC is based on a set of common objectives to be translated into national policy by Member States through two-year National Action Plans. From 2006 onwards the OMC/social inclusion will be developed in a new streamlined framework encompassing pensions and possibly healthcare.

On the basis of the analysis of the second round of National Action Plans 2001-2003, the Joint Inclusion Report adopted by the Commission and the Council stresses that modernisation of the economy should go hand in hand with efforts to reduce poverty and social exclusion. Member States are urged to give particular attention to six key priorities over the next 2 years:

- promoting investment in and tailoring of active labour market measures to meet the needs of those who have the greatest difficulties in accessing employment;
- ensuring that social protection schemes are adequate and accessible for all and that they provide effective work incentives for those who can work;
- increasing the access of the most vulnerable and those most at risk of social exclusion to decent housing, quality health and lifelong learning opportunities;



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- implementing a concerted effort to prevent early school leaving and to promote smooth transition from school to work;
- developing a focus on ending child poverty as a key step to stop the intergenerational inheritance of poverty;
- initiating a drive to reduce poverty and social exclusion of immigrants and ethnic minorities.

In parallel, cooperation is underway with the accession and candidate countries in preparation for their participation in the OMC once they join the Union. Together with the Commission, they have produced or they are preparing joint inclusion memoranda (JIM), identifying the main problems and challenges and putting forward priority policy measures.

A Community Action Programme on Social Inclusion was launched in 2002 to encourage co-operation and the exchange of learning and best practice between Member States. A key component of this action programme is the Peer Review Programme whose aim is to promote a reciprocal learning process across the EU on the basis of systematic evaluation of good practices presented in the National Action Plans (NAPs/incl).

The objectives of the peer review programme are:

- to contribute to a better understanding of the Member States' policies in combating poverty and social exclusion, laid down in their National Action Plans (NAPs/incl);

- to facilitate the transfer of key policies, or of institutional arrangements, which have proved effective in combating poverty and social exclusion in their original context and are relevant to other contexts;
- to improve the effectiveness of the policies and the strategies for social inclusion in present and future Member States.

Eight peer reviews will be held in different Member States in 2004, involving national and regional authorities, independent social inclusion experts, stakeholders' representatives and European Commission officials. The reviews will examine specific social inclusion policies in order to assess whether and how they can be effectively transferred to other Member States or Institutions. Their findings will be extensively disseminated through a web-site, publications and a newsletter. As such, this process constitutes an important element in our joint action to combat poverty and exclusion.

I invite not only the participants in the peer review seminars but also all the readers of this newsletter to submit comments and feedback¹, in order to share their experiences, and contribute to a lively discussion.

Odile QUINTIN

¹ www.peer-review-social-inclusion.net



First Peer Review Meeting Takes up the Challenge

The Peer Review Programme on national social inclusion policies got off to a strong start in Sweden at the end of April.

Experts from seven peer countries: Belgium, Finland, Italy, Lithuania, the Netherlands, Portugal and Spain, plus stakeholder representatives from the European Anti-Poverty Network and the European Public Social Platform, met together in Stockholm to assess Sweden's Local Development Agreements (LDAs), and whether they can really play a role in breaking down segregation in poorer city areas.

The agreements are designed to give residents a real say in the strategies and projects used to counter social exclusion in their neighbourhoods. How the Swedish authorities go about putting this 'bottom-up' approach into practice was just one of the aspects of special interest to the peer group members. Another was the cross-sector collaboration at all levels of government that is helping to break down the barriers that stop people getting the help they need.

Rigorous evaluation is carried out each year, allowing for local objectives to be kept up to date. This was something else the peer group countries felt they might be able to use to improve their own national strategies.

The LDAs form part of the Swedish government's 1998 Metropolitan Policy, launched with the twin aims of promoting long-term economic growth and breaking down ethnic and social segregation. Mr Evert Kroes from the Swedish Justice Ministry outlined the agreements made with seven municipal authorities, covering 24 housing

districts and some 250,000 inhabitants, and bringing extra funding for over 1,000 local projects.

The peer review participants visited the Job Centre in Skärholmen, south west Stockholm, where staff have adopted a new approach that helps people take control of their lives.

One aim of the peer review programme is to improve the effectiveness of policies and strategies in the area of social inclusion. "This is a vital challenge," said Mr Armindo Silva, head of the unit for social protection policies in the European Commission's Directorate-General for Employment. "The peer review should be looking for success stories, or at least inspiring stories."

The reports and papers from the first peer review meeting will be published on the website of the Peer Review Programme:
www.peer-review-social-inclusion.net

More information and evaluations of the Local Development Agreements can be found at:
www.storstad.gov.se/english



Review Programme 2004

Expected Date	Host Country	Peer Countries	Topic
22 - 23 April	Sweden	Belgium · Finland Italy · Netherlands Lithuania · Portugal Spain	Local development agreements as a tool to stop segregation in vulnerable metropolitan areas
5 - 6 May	United Kingdom	Denmark · Finland France · Luxembourg Norway · Romania Sweden	The Rough Sleepers Unit (England)
7 - 8 June	Austria	Czech Republic Estonia · Italy Lithuania · Norway	Clearing: Assistance for young people with special needs in their transition from school to working life
15 - 16 June	Netherlands	Bulgaria · France Greece · Latvia Poland · Slovenia Spain	Experiments in social activation (1996 - 2001)
23 - 24 September	Finland	Austria · Belgium Germany · Greece · Latvia Malta · United Kingdom	Citizens' social support networks (HYVE)
8 - 9 November	France	Czech Republic · Cyprus Germany · Ireland Portugal · Sweden	New migrants integration
18 - 19 November	Ireland	Denmark · Germany Hungary · Luxembourg Netherlands · Slovakia Slovenia · United Kingdom	Money advice and budgeting service
2 - 3 December	Germany	Austria · Cyprus Estonia · Hungary Malta · Slovakia	Reconciliation of work and family life

Updates of this table are frequently available on www.peer-review-social-inclusion.net



Sweden

Local Development Agreements as a Tool to Stop Segregation in Vulnerable Metropolitan Areas

The Swedish government, following a decision in the Swedish parliament in December 1998, has developed a national metropolitan policy. Local development agreements are the main tool for achieving sustainable development. These agreements are based on the assumption that the best results will be achieved if efforts are co-ordinated, and spring from the inhabitants' perspective of what will work in their own community.

The Swedish metropolitan policy rests upon two overall objectives, namely:

- 1 To support development in the urban areas towards long-term sustainable economic growth.
- 2 To break down social, ethnic and discriminatory segregation in these areas and work for equal opportunities on both an individual and gender level.

From 1999-2001, seven local development agreements were established between the Swedish state and seven municipalities, covering 24 distressed urban areas. The agreements focus on individuals and city districts and take a holistic approach combining a variety of measures addressing unemployment, language training, crime prevention, education and participation. Over 1,000 cross-sector measures have been initiated within the agreements in order to combat social exclusion. Every agreement is revised annually.

The development agreements include locally developed objectives, an individual action plan for each city district covered by the local agreement, the regulation of central and local measures in the respective areas, and a follow-up and

assessment plan. They are based on trust, co-operation and common objectives at central and municipal levels. The local agreements include an accord on how measures are to be financed. Progress towards meeting the local goals is reported annually to the government's Commission on Metropolitan Areas.

The metropolitan work is based on four major principles:

- 1 The bottom-up perspective means that all measures make the inhabitants' interests and participation their first priority.
- 2 Management by objectives means that each measure taken should relate to a given objective and be a part of a major plan.
- 3 Co-operation means that measures should – as far as possible – involve cross-sector activities.
- 4 Long-term work means that this development process will extend over a long period of time.

A major programme of evaluation is ongoing, at both national and local level. A report covering the work so far was presented to the Parliament in 2003. In parallel, a discussion is taking place on what forms the continued work on metropolitan issues should take and the possible continuation of the development work within the framework of regular resources.

The project is well documented and evaluated. More information can be found on www.storstad.gov.se/english



United Kingdom

The Rough Sleepers Unit (England)

The Rough Sleepers Unit (RSU), established in April 1999, had responsibility for delivering the target of reducing rough sleeping in England to as near to zero as possible and by at least two-thirds by 2002. In December 2001, it announced that the latter target had been met and estimated that the number of people sleeping rough in England on any single night was around 530, a reduction of 71% since 1998. Latest figures show that the reduction has been sustained, and that there are still less than 600 people sleeping on the streets.

Measurement of progress was by rough sleeping street counts, based on methodology developed in partnership with the voluntary sector. Independent evaluation has shown consistently that they are the most effective method for evaluating the changing levels of people sleeping rough. Other methods exist to measure wider forms of homelessness.

Since 2002, this work has been incorporated within the government's new Homelessness Directorate. The Directorate's recent report *More than a roof* sets out a new approach, which looks at helping people with the problems they face as well as improving the places they live. The Directorate must ensure that the lessons learnt by the RSU are appropriately addressed, for example by Homelessness Strategies at local level.

Source: Information from United Kingdom Government to EC



Austria

Clearing: Assistance for Young People with Special Needs in Their Transition from School to Working Life

For many young people with special needs, leaving school brings a danger that the continuity in their support might be broken. After leaving compulsory school, some move to various institutions and measures, and a considerable number stay at home with their families without any perspectives for support or employment. A comprehensive safety net or support system for the after-school phase of disabled schoolchildren did not exist until now.

Clearing has developed a new service that acts directly at the interface between school and employment. In the final or penultimate school year, Clearing facilities have the task of determining – together with those affected – the most suitable individual package of measures for integration into employment. This service includes in particular: drawing up a profile containing interests and suitability; carrying out a strengths/weaknesses analysis; establishing or outlining any possible needs regarding extra training; revealing employment perspectives on the basis of the interests and suitability profile, and building on that; the drawing up of a career/development plan.

The idea is not to take existing problems away from young people and their parents, but that they should be offered the support necessary to solve issues which arise, as independently as possible, according to the principle of *helping people to help themselves*. An essential factor for success is the active inclusion of the young people, their parents and teachers. The needs, possibilities and interests of the young people form the basis of the actions of the Clearing offices.

Clearing also has an essential co-ordinating function in the existing distribution of responsibilities for support, which is not always transparent for those affected. The co-operation partners are the provincial education authority, the Public Employment Service, class teachers, parents, facilities for people with disabilities and the Federal Social Welfare Office, with the latter playing a managing role. In 2002, 1,450 young people successfully completed the Clearing process. Having provided suitable apprenticeships, employment contracts, Public Employment Service measures or further school education for many young people with disabilities, the Clearing measures are to be further extended.

Source: Joint Inclusion Report 2003 of the European Commission



The Netherlands

Experiments in Social Activation (1996 - 2001)

During 1996-2001, the Ministry of Social Affairs and Employment authorised (on request) the municipalities to deviate from a number of provisions of the National Assistance Act (ABW) in order to develop new activation instruments to prevent social exclusion of benefit recipients who are remote from the labour market, and to promote their reintegration into the labour market. These deviations concerned, for example, regulations on compulsory job seeking or financial incentives.

Participants in the new measures included the low-qualified, lone parents, drug addicts and people with psychological and social problems. Municipalities arranged additional assistance for these groups in order to make the participants familiar with the working day rhythm and help them gain more self-esteem. They developed socially beneficial activities such as the recycling of old materials, management of second-hand shops, and work at public recreational farms. Further activities were organised to improve participants' social skills. Municipal social services carried out the experiments with other municipal bodies, reintegration, welfare, voluntary and client organisations.

Evaluation studies show that the initiatives have contributed to a reduction in social isolation, a strengthening of the labour market position and a more active attitude among the participants. They have provided the incentive for developing long-lasting social activation strategies, which continue even beyond the experimental period. The success of the experiments was due also to the fact that the policy received widespread support among the municipalities, and that they fitted into the development of policy strategies aimed at strengthening social cohesion within cities and neighbourhoods.

Social activation experiments are now being implemented for other groups of benefit recipients, particularly those on disability benefit schemes. Steps have also been taken to strengthen the policy.

Source: Joint Inclusion Report 2003 of the European Commission · Ministry of Social Affairs and Employment, the Netherlands



Finland

Citizens' Social Support Networks (HYVE)

HYVE is a model for regional action to further welfare in which one or more municipalities co-operate with the Finnish Federation for Social Welfare and Health, its regional associations and other local actors including the regional centres of expertise in social welfare. The work is based on the social situation, needs, problems and challenges in the relevant area. The aim is to generate welfare services and support through co-operation in which the work of public-sector professionals is co-ordinated with third-sector and NGO activities. Various kinds of network models are used for this co-ordination, concentrating on preventing threats and risks and actively overhauling service concepts and welfare service structures. This approach results in tailored solutions for preventing social exclusion, that take local circumstances into account. The HYVE model also combines personnel training with a research-oriented approach.

The administrative basis of the model is a framework agreement between the above-mentioned Federation, a municipality (or municipalities) in the region (Oulu, Joensuu, Jyväskylä and Jyväskylä rural municipality) and regional social security associations, and joint action plans and network budgets drawn up annually.

The action model also demonstrates that, after an initial project stage, a joint development scheme can be successfully turned into a permanent arrangement with long-term effectiveness. Work is at the project stage in two regions: in Southern Finland the city involved is Helsinki, and in Western Finland, the cities are Kokkola, Seinäjoki and Vaasa.

Source: NAP/incl Finland, 2003 · Ministry of Social Affairs and Health, Finland



France

New Migrants Integration

In order to ensure the best conditions for the reception and integration of migrants arriving in France, the International Migration Office (OMI), a public body under the tutelage of the Ministry of Social Affairs, set up reception platforms at the beginning of 1998. Installed in the 16 départements that receive the greatest number of foreigners, these platforms facilitate the integration into French society of families arriving in France for family re-unification, or foreign members of French families, or families of statutory refugees. In 2002, 37,000 of 100,000 foreigners involved received services from these platforms.

The services comprise a presentation of the French way of life, the identification of the needs of the migrant families in different areas (social integration, French language lessons, workplace integration, health, schooling, access to rights), and guidance towards the appropriate services to meet these needs.

The platform concept calls for the involvement of locally co-ordinated representatives. This initiative, like all those relative to the interministerial action programme for the integration of foreigners, is subject to quarterly follow-up work and is monitored by a committee that brings together all relevant administrations.

The success of the scheme has motivated the public authorities to plan for an increase in the number of existing platforms (five new platforms by December 2003) and to extend their missions (new populations, enhanced services). A new universal public agency, operating with resources from the OMI and the bureau of social services for immigrants (SSAE), will be solely responsible for welcoming new migrants who will be offered an introduction and integration contract upon arrival.

Source: NAP/incl 2003, France - Joint Inclusion Report 2003 of the European Commission



Ireland

Money Advice and Budgeting Service

The Money Advice and Budgeting Service (MABS) is a countrywide service funded by the Department of Social and Family Affairs. The service is managed by 52 locally based companies, with board members drawn from the statutory and voluntary sectors. The MABS provides an independent, free and confidential service primarily to low-income families who are in debt or at risk of getting into debt. It has an emphasis on practical, budget-based measures that will succeed in removing people permanently from dependence on moneylenders and open up alternative sources of low-cost credit through their local credit unions. Credit unions are member-owned and member-run financial co-operatives. Members of a credit union have a common bond generally based on where they live (community) or where they work (occupational). The MABS has a special relationship with the credit unions, which operate a *special accounts* system to enable the MABS client to repay debts and save small amounts. A Loan Guarantee Fund also operates to provide *crisis* loans as an alternative to the moneylender.

The aim of the service is to help people to regain control of their finances and to budget for the future. It helps them to prepare a budget plan and to contact their creditors with a view to rescheduling repayments. The Money Adviser also helps clients to maximise their income, prioritise their debts, and where necessary, contact and refer to other support agencies. The MABS frequently intervenes to prevent repossession of the family home and also to prevent disconnection of gas and electricity supply.

A Pilot Debt Settlement Programme was recently agreed by the MABS and the Irish Bankers' Federation and supported by the other main creditors. This pilot scheme provides a non-judicial alternative for resolving cases of multiple consumer debt that are likely to prove intractable and otherwise end up in court. The scheme introduces a range of innovative features that are new to this jurisdiction, such as a finite period for an agreed debt repayment programme, the freezing/reduction of interest and the write-off of residual debt on successful completion of the programme. The debtor's principal private residence is secured against enforced sale or repossession.

Source: Joint Inclusion Report 2003 of the European Commission



Germany

Reconciliation of Work and Family Life

In summer 2003 the German Federal Ministry for Family Affairs, Senior Citizens, Women and Youth, in partnership with the Bertelsmann foundation, launched the *Alliance for the Family*, in which the government, social partners, NGOs and other important stakeholders work together on a sustainable policy in favour of the family. This new co-operation between politicians, business and trade unions is based on the consensus that a higher birth rate, a higher labour market participation by women and the best education and training of children are needed to cope with the challenges of the demographic change and international competitiveness.

Various projects and studies within this alliance aim to improve the balance between work and family life. The strategy of the *Alliance for the Family* includes the following elements:

- Feasibility studies and cost-benefit analyses aim to prove that family-friendly measures are more a matter of being ready to innovate than of investing a lot of money. It can be shown that for small and medium-sized companies the benefits of family-friendly measures are higher than the investment in such measures, even in difficult times for the economy.
- Survey research allows us to monitor the state of family-friendliness in German companies as well as the kind of measures applied. Another survey among employees views family-friendliness as a location factor and points out a high demand for flexible working time arrangements.

- Companies are asked to run a *Career and Family* audit, in which family-oriented measures can be evaluated and the potential for a further family-friendly development can be identified.

Companies can also participate in a competition in which the most family-friendly enterprises receive an award. This competition is partly financed by the European Social Fund.

- In early 2004 the federal initiative *Local alliances for the family* was started. The target of this initiative is to strengthen a family-friendly atmosphere at the local level by facilitating co-operation and exchange of experience between companies, social organisations and municipalities. Within four months 52 local alliances joined the initiative. There is a great variety of starting points for improving the work-life-balance at local level. A service bureau has been established that currently supports 143 local alliances and actors intending to found a new local alliance. The initiative is financially supported not only by the government but also by the European Social Fund and private foundations.

Source:

www.bmfsfj.de/Politikbereiche/Familie/familie-und-arbeitswelt
www.lokale-buendnisse-fuer-familie.de



The INBAS/NIZW/European Centre Partnership

The German Institute for Vocational Training, Labour Market and Social Policies (INBAS), and its partners the Netherlands Institute for Care and Welfare (NIZW) and the European Centre for Social Welfare Policy and Research, have been contracted to assist the European Commission officials responsible for the overall operational management and co-ordination of the peer review in the field of social inclusion.

INBAS is a private consultancy with extensive experience in the area of labour market and social policy measures as well as in evaluation and technical assistance at European level. INBAS was involved in providing services to the European Commission within the framework of the labour market peer review programme 2000-2001. The INBAS team co-ordinated the majority of peer reviews during this programme and proved that it has the subject expertise and technical capabilities needed by the Commission to manage a peer review programme. Further information is available on www.inbas.com In the framework of this contract, INBAS is supported by its affiliated company INBAS Social Research, which has considerable experience in various areas of social inclusion policies. Further information on www.inbas-sozialforschung.de

The **European Centre for Social Welfare Policy and Research** is an intergovernmental organisation concerned with all aspects of social welfare policy and research. Its 32 Member States belong to the European Region of the United Nations and are all represented by a National Liaison Official.

Research and programme activities focus on welfare and social development in a broad

sense, in particular in areas where multi- or interdisciplinary approaches, integrated policies and inter-sectoral action are called for. European Centre expertise includes issues of demographic development, work and employment, incomes, poverty and social exclusion, social security, migration and social integration, human security, care, health and well-being. The emphasis is on the interplay of socio-economic developments with institutions, public policies, monetary transfers and in-kind benefits, population needs and the balance of rights and obligations. Further information on www.euro.centre.org

The **Netherlands Institute for Care and Welfare** (NIZW) is an independent research and development organisation dedicated to raising the quality of work in the care and welfare sectors, in co-operation with institutions, professionals, policymakers, NGOs and citizens. The NIZW International Centre promotes and co-ordinates international co-operation and exchange of knowledge and information, and monitors international developments in health, care and welfare. NIZW is actively involved in numerous European and international development projects in the field of social policy. Further information on www.nizw.nl

INBAS, NIZW and the European Centre will second some of their highly qualified key staff members for the management of individual peer reviews and will be responsible for publications and dissemination, using their well-established contacts with NGOs, government officials and the scientific community in the Member States, Accession and EFTA/EEA Countries. The three partners have already collaborated in various EU-funded transnational projects in recent years.



Useful Information

Operational Guide

To facilitate the smooth implementation of the peer review programme the European Commission has developed an operational guide for the actors involved. It explains the background and the objectives of the peer review programme and the general organisation of a review, specifies the roles and tasks of the different groups of actors (Member State and European Commission officials, national experts, stakeholders, consultants), and presents detailed information on various technical and financial issues. The annexes include standard terms of reference for national experts to be contracted by the participating Member States, the rules and regulations of the European Commission for reimbursement of travel expenses, and an overview of costs to be covered by Member States hosting a peer review.

The operational guide can be obtained from the European Commission (see contact details below) or can be downloaded from the programme website (see below).

Website

From April 2004, a website for the peer review programme in the field of social inclusion is online at www.peer-review-social-inclusion.net

It will publish all reports and other relevant documents and information. The website is disability friendly.

Contact

For further information, questions or comments on the peer review programme and its implementation, please contact:

European Commission

Hugues Feltesse:
hugues.feltesse@cec.eu.int

Armindo Silva:
armindo.silva@cec.eu.int

INBAS/NIZW/European Centre

Birgit Rasehorn, Wolfgang Schlegel:
peer-review@inbas.com

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