

Ireland 2007

# The NAPInclusion Social Inclusion Forum

Minutes



On behalf of  
**European Commission**  
DG Employment, Social Affairs and Equal Opportunities

# The NAPInclusion Social Inclusion Forum

Dublin, 15-16 November 2007

*The Peer Review was hosted by the Office for Social Inclusion in the Irish Department of Social and Family Affairs.*

## Day 1

### Welcome addresses

Bidding a warm Irish welcome to the peer reviewers, **Gerry Mangan** (Director, Office for Social Inclusion, Department of Social and Family Affairs, Ireland) emphasised that the Irish government would be very interested in their evaluation of Ireland's Social Inclusion Forum, which has been running for about four years and is still to some extent at the experimental stage.

**Peter Lelie** (European Commission, DG Employment, Social Affairs and Equal Opportunities) welcomed the participants on behalf of the European Commission. This would be the sixth Peer Review organised under the 2007 programme. Normally, eight are held each year. The programme was established in 2004. This is the second Peer Review in Ireland. The first was in 2004, on the Money Advice and Budgeting Service.

The *objectives of the Peer Review* are to:

- Facilitate a *better understanding of Member States' policies and strategies* for social protection and social inclusion, as laid down in the National Reports on Strategies of Social Protection and Social Inclusion and in the National Action Plans on Social Inclusion, and of their impact;
- See whether other countries can make their own policies more effective and efficient by *learning from other Member States' experiences*;
- See whether Peer Reviews can facilitate the *transfer of key components of policies, strategies and institutional arrangements* that have proved to be effective in one context, to other relevant contexts.

Peer Reviews are never about simply carbon-copying from one country to another. They are about intelligent, sophisticated copying and seeing whether circumstances are similar enough to guarantee that, by using some of the ideas developed in other countries, improvements can really be achieved. Over the past four years, efforts have been made to make the Peer Reviews more and more effective. People taking part in them have been asked if the reviews create added value. On the whole, people have been quite happy with the reviews, which they find useful.

However, for as long as the Commission does not see the Open Method of Coordination (OMC) having a decisive impact on the eradication of poverty, further work is needed on improving the instrument. He asked for the participants' views and suggestions on this. The Commission is already looking at a number of points, including the need to improve dissemination and to have a more developed communications strategy in future. Peer reviewers themselves could assist in this by helping to spread the message. Information on all the Peer Reviews is available at [www.peer-review-social-inclusion.net](http://www.peer-review-social-inclusion.net). Another need is for more synergies between the various EU instruments working

for social inclusion. In particular, efforts are being made to ensure that the independent network of experts on social inclusion always participates in the Peer Reviews. Better measurement of the impact of policies is also required. When a particular policy is recognised as a good practice, there need to be measurable criteria for doing so.

The Social Inclusion Forum which is the subject of the present review is, he said, all about the participation of stakeholders, including people experiencing poverty, in the decision-making on social inclusion policies and the National Action Plan. This is an important part of the OMC approach to tackling poverty. First of all, it is a matter of fundamental rights and democracy. If policies affect people's living conditions, people need to be able to participate. Secondly, if policies are to be really effective, the policy-makers need to listen to the people who are actually confronted by these situations on a daily basis. Finally, by participating in policy development, people living in poverty are empowered to confront their day-to-day problems. The various National Action Plans on Social Inclusion have always included participation in their guidelines. The Commission has always asked Member States to give it information on how they are involving stakeholders, including people living in poverty, in the development of their programmes. The OMC has led to more participation in policy development on social inclusion. The challenge to be faced now is the quality of participation. How can that participation be measured? What are its dimensions?

So he thanked the Irish hosts for the opportunity to take a closer look at the Social Inclusion Forum, which is indeed an example of good practice in this field. He hoped that the exchanges that would take place within this seminar would also provide the Commission with ideas for drafting its guidance for the next round of National Action Plans, as well as for assessing those plans at the end of 2008.

### Introduction to the Irish policy

The policy under review was outlined by **Carmel Corrigan** (Ireland), an independent researcher who has acted as the rapporteur for all four of the Social Inclusion Forums held in Ireland to date. She saw the forums as a good way of meeting the commitment to mobilise more of the social actors. In 1997, she recalled, Ireland adopted its first National Anti-Poverty Strategy (NAPS). It had five key themes, and for the first time it established targets. The key themes were education, income, unemployment, rural poverty and urban disadvantage. The significance attached to this strategy is shown by the fact that a Cabinet Committee was set up to oversee it, chaired by the Taoiseach<sup>1</sup>. It is also supported by a Senior Officials Group. In 2001, as had been planned, the NAPS underwent intensive review. This took place through six interdepartmental groups, including representatives of government departments, state agencies and NGOs. In itself, it was an exercise in consultation. To the previous themes, it added certain new ones, namely housing and accommodation and health. It also took a slightly different approach by adding a number of vulnerable groups, including people with disabilities, children and young people, women and ethnic minorities. In establishing a new anti-poverty strategy, the government recognised that there was an information gap, so greater efforts were made to bring in more NGOs and people experiencing poverty. It was in this context that the Social Inclusion Forum (SIF) was established. The dovetailing of the original national NAPS process and the EU NAPinclusion process under the Open Method of Coordination has added an important extra dimension to the process.

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<sup>1</sup> The Irish terminology for Prime Minister.

A lot of what constitutes social policy in Ireland is now negotiated through the social partnership process. Opinion is very split in Ireland on the subject of social partnership, she said, but one of the positive aspects of that process is that, uniquely in Europe, Ireland's NGOs are recognised as full social partners on all topics except wages. So the NGOs can represent people who are experiencing poverty at a very serious decision-making level. The aim of the SIF is really to provide for discussion, exchange and discourse between the State, NGOs, people in poverty and local government who were not directly involved in the social partnership process. This is an opportunity for all of these actors to get together with senior policy-makers within a single forum in order to be heard and to hear what is going on. This is therefore a strong consultation exercise. *The SIF sets out to give participants the opportunity to:*

- *be provided with information* on progress and developments under the NAPinclusion process;
- *input their views* on key policies and implementation issues;
- *identify barriers and constraints* to progress and how these can best be tackled;
- *provide suggestions and proposals* for new developments and more effective policies in the future.

The added value of the SIF is that it is the only space where all of these people get together in order to exchange information and opinions. It is the only place where people in poverty, local NGOs, national NGOs and national policy-makers come into the one room and exchange views. From the policy-makers' perspective, one of the main advantages of participation and consultation is that they give them the opportunity to hear from local NGOs, people in poverty and local government. Both local organisations and local government are very close to those who are experiencing poverty. Policy-makers therefore receive valuable feedback about how their policies are actually working out on the ground. From the participants' point of view, this is an opportunity for NGOs to get together. Often, those NGOs are operating locally, in quite an isolated way. It is also an opportunity for the NGOs to engage directly with the policy-makers and with the minister responsible for the NAPinclusion.

The forum provides an opportunity to make a direct input into the NAPinclusion process. The current Irish NAPinclusion has adopted a lifecycle approach, with four key groups: children; people of working age; older people and people with disabilities. This places individuals at the centre of policy development, by looking at what vulnerable people need at each stage of the lifecycle. But it also has 12 high-level goals which cut across those key groups. There is an increased awareness that participation is a fundamental right, and that people in poverty also have that right. This leads to better policy and a better relationship between the State and its citizens. Participation in decision-making, in the strictest sense, takes place through the social partnership process. But there is also a wider participation process going on, and the SIF is a central part of that. Within this broader arena of consultation, the *White Paper on the Framework for Supporting Voluntary Activity and for Developing the Relationship between the State and the Community and Voluntary Sector* makes it quite clear that the community and voluntary sector has the right to input into policy and to be consulted. This is also stated in the current social partnership framework agreement, *Towards 2016*. More recently, in what she regards as a significant move, Ireland has adopted regulatory impact analysis. As part of that, the Department of An Taoiseach<sup>2</sup> has issued specific guidelines for civil servants on how to consult. These guidelines also mention the need to consult with people who experience poverty and with the organisations that represent them. The guidelines are quite new, so not much is yet known about their implementation in practice. There has also been a long process of local government reform in

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<sup>2</sup> The Prime Minister's Office.

Ireland, and there are now a number of mechanisms for drawing local organisations and people into decision-making.

Prior to the first SIF in January 2003, the Combat Poverty Agency organised a number of regional seminars to inform people about it. These events increased people's capacity to engage with the issues through the SIF. The Combat Poverty Agency also grant-aided the Community Platform – a network of NGOs – to undertake awareness- and capacity-building meetings with their member organisations, with a view to having more sophisticated discussions within the SIF. In 2005, the Office for Social Inclusion (OSI) itself held seven national and regional seminars and circulated papers, prior to the SIF, highlighting the key issues for its workshops. In 2006, the European Anti-Poverty Network (EAPN) received funding from the Combat Poverty Agency to hold capacity-building seminars for people in poverty. The very small groups on which these seminars focussed included various kinds of people who were directly experiencing poverty. Interestingly, the main topic was “what does the government need to do if things are to improve for you?” A number of the themes that emerged from the answers to that question were subsequently built both into the EAPN's policies and into the SIF's work. In 2007, although EAPN did not hold specific meetings this time in preparation for the SIF, they did some capacity-building and awareness-raising through their own meetings. About 20 of the participants from those meetings would be taking part in the 2007 SIF.

The SIF is organised jointly by the National Economic and Social Forum (NESF) and the Office for Social Inclusion (OSI) at the Department of Social and Family Affairs. It is held in the Royal Hospital Kilmainham, as this is probably the largest conference venue in Dublin. A big conference hall is needed, due to the number of people attending. But although the venue can hold 200-300, the SIF is nonetheless oversubscribed every year. This is a measure of its success.

The usual format for the SIF is to start with a plenary session, which typically includes:

- an input from a European Commission representative on progress and development at the EU level;
- a presentation on poverty in Ireland;
- an input from the OSI on progress in Ireland;
- an input from EAPN on what they see as the current challenges and issues.

Between inputs, there are roundtable discussions, in which participants are asked to consider the inputs and respond to them. A number of themed workshops are usually the next element in the proceedings. They include inputs from one or more experts (NGOs, civil servants, academics etc.). The day ends with another plenary session and a panel discussion. All the plenary sessions are recorded and transcribed. All the workshops have rapporteurs, and the rapporteur for the whole forum compiles a report for publication by the NESF. The reports are online at [www.nesf.ie](http://www.nesf.ie). So far, every SIF has been opened by a government minister, which is a significant demonstration of political commitment.

To date, there has been no independent evaluation of the SIF. In 2006, however, the participants were asked to complete evaluation forms. The overall response was positive. 85% of respondents rated it as “good” or better. The aspects that participants liked best included networking, meeting policy-makers and a minister, and the opportunities for discussion. The networking element is particularly significant, as it is also a form of organic capacity-building. Suggestions for improvements included more time for discussion, more time for questions and answers, greater NGO representation on the panels, less jargon, provision of more information before the forum and a focus on the results of the NAPinclusion – in other words, what is working and what is not. Also, some felt that more needs to be said about where things will go after the forum.

The SIF has been built into Ireland's policy-making process in a number of ways. By including the key target groups for social policy, it acts as a barometer of how the success of the NAPinclusion process is perceived. This is a useful checking mechanism. One of the things that come across very clearly from the SIF is that it constantly highlights the multidimensional nature of poverty and social exclusion. People in the workshops talk not only about poverty, but also about the education of their children, about the lack of public transport in the areas where they live and many other issues.

The SIF is a means of fulfilling the Irish government's commitment to consultation with all relevant stakeholders. It provides invaluable opportunities for information exchange and, hopefully, results in better policies.

A relatively detailed report of the whole SIF proceedings is produced. Being a public document, it goes to the government for reading and approval before publication. That in itself represents a significant SIF contribution to government thinking. Senior civil servants see the report and discuss it. In this way, the issues involved are continuously brought to the government's attention.

**Gerry Mangan** added that, although there has been no independent evaluation of the SIF so far, the OSI and the NESF has kept the process under constant review. Improvements have been made each year. This year, for example, it was decided to drop the OSI's own presentation from the SIF's agenda, because it was felt that it involved too much time taken up on giving people information that they can easily get from other sources. In this way, the time available for discussion could be significantly extended. Also, considerable information input would come from the Minister's opening remarks and from the talk on poverty to be given by this year's guest speaker at the SIF, Professor David Gordon, Townsend Centre for International Poverty Research, UK. Gerry Mangan emphasised that the SIF consists of just eight hours of discussion. As 230 people would be attending, there are obvious limits to what can be achieved within that time. He therefore asked the peer reviewers to see the SIF within the context of the overall consultation process. The key question is what does the SIF contribute to that overall process. In his experience, it serves not only to provide feedback on policy and its implementation but also to stimulate thinking and reflection. When people come together and discuss issues, they usually go away with a deeper understanding of them. The SIF also helps to provide a wider perspective. Those involved both in policy making and policy advocacy are invariably at risk of "tunnel vision" – as they are very focussed on their own concerns. SIF discussions and exchanges can help them to see issues in a broader context. The SIF also provides an important opportunity for officials to talk directly with people experiencing poverty and those working with them, enabling both sides to see the people behind the analysis and the statistics. And it is an opportunity for networking. The coffee breaks and lunches are as important a part of the process as the formal sessions. Moreover, the reports that emerge from the SIF are indeed an important factor in government policy-making. He asked the peer reviewers to take these elements into account when arriving at a judgement of the whole process.

### **Participation in the Social Inclusion Forum**

The peer reviewers then attended the morning plenary and roundtable discussion sessions of the 2007 SIF, as well as one or other of its workshops on children, people of working age, older people and communities. Both the Forum's Chairperson, Dr. Maureen Gaffney, and the Irish Minister for Social and Family Affairs, Martin Cullen T.D, mentioned the presence of the peer reviewers and welcomed them to the SIF. During the roundtable sessions, the SIF participants were assigned to a series of small tables, each seating eight to ten people including a facilitator. At the 2007 SIF, three

questions were put to the roundtable participants. These are shown on the following page in our inset "Q&A", together with sample responses from one table, as noted by its facilitator. The facilitators' notes from each table are handed in to the NESF secretariat.

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## Q&A

*The following are the three questions put to the roundtable session at the 2007 SIF, together with sample responses from a group sitting at one table.*

### Question 1. What are the group's views on key policy implementation issues?

#### Response:

- Complexity of government departments – not joined up, need more unified delivery. New Office of Violence Against Women may make an improvement.
- Questions relevant – "are you doing things right?" vis-à-vis "are you doing the right thing?" Coordination and combination of income and supports/services.
- Implementation is complex – no easy answers.

### Question 2. What are the barriers and constraints to progress and how best can these be tackled?

#### Response:

- Need to ask people experiencing poverty – the Social Inclusion Forum.
- Importance of politics re decision-making but some alienated from this.
- Integration of service delivery at local level has proved difficult but this is key. Collaboration is very important here.
- Information is key – people need to know services available and how to access that.
- Basic literacy is important.
- Perception and attitude that people are lazy.
- Issue re integration of migrants – blame culture and racism.
- Importance of good role models.'
- Lack of education and training – but training providers may not be aware of people's needs, e.g. times of courses, transport, childcare.
- Lack of confidence – social interaction important.

### Question 3. Has the group any suggestions on policy proposals for the future?

#### Response:

- Importance of organisations taking poverty in account in all of their work.
  - Greater financial literacy required, e.g. in school curriculum, drawing on European experience.
  - Importance of activation – supporting people into work – low income and lone parents – education, training, childcare, transport.
  - People lifted out of poverty trap – need to ensure they stay out, e.g. community employment – can recycle people, length of contract, loss of benefits, cost of part-time fees.
  - Accessibility of funding.
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## Peer Review session

*After lunching with the SIF participants, the peer reviewers held a separate meeting on two points: presentations by the EU stakeholders, and the peer reviewers' own initial reactions to the SIF.*

### *Presentations by the EU stakeholders*

**Sarah Welford** (ATD Quart Monde/ATD Fourth World) said it is always extremely motivating to see new initiatives that aim to bring all different levels of stakeholders together in order to dialogue and to bring the political level closer to the realities of those who live with the consequences. Her contribution today (and in her paper) was from the perspective of people experiencing poverty and the place given to them in order that they can fully participate in this process. Therefore, it did not attempt to be a full political analysis. It is a more focussed one, based on ATD Fourth World's 50 years of experience in participation with very poor families throughout Europe and the world.

The very first thing that participation does is to give recognition to the struggle and actions that those who live in poverty face every day. One of the biggest challenges in Europe today is the recognition of the efforts that people living in poverty make to get themselves and their children out of their situation. It provides an opportunity to prove their individual and collective efforts and in doing so it addresses a question of human rights. To enable this participation is to give a voice to and allow people to exercise their rights as citizens. It also serves as a step forward in the fight for human rights for all. She quoted Joseph Wresinski, the founder of ATD Fourth World in 1957: *"For the very poor tell us over and over again that a human being's greatest misfortune is not to be hungry or unable to read, nor even to be without work. The greatest misfortune of all is to know that you count for nothing, to the point that your suffering is ignored. The worst blow of all is the contempt on the part of your fellow citizens. For it is that contempt which stands between a human being and his rights that makes the world disdain what you are going through and prevents you from being recognised as worthy and capable of taking on responsibility."*

In the context of the Social Inclusion Forum, this participation aims at bringing the decision-making process closer to the realities of what people live. In doing so, it improves the democracy in which we live and enables the creation of policies that more closely correspond to the needs and aspirations on the ground. Her organisation's paper had also sought to highlight the other windows of opportunity that enabling participation presents to us and to speak about what else is at stake when we talk about participation, and what else might be possible to achieve - how much further than consultation we could go. The main part of the analysis is around how effective the participation of people experiencing poverty is in the forum itself. The host country paper talked of the participation of significant numbers of people with experience of poverty. However, further analysis reveals that this was more in the preparation than in the forum itself. On first analysis, she had looked at the evaluation included in the host country report and assumed that some of this reflected the views of the people with experience of poverty who attended the SIF, because the comments made (such as *"participants felt that the workshops were too rushed, too crowded and there was not enough time for deliberation... language was difficult for some participants... too much jargon was used..."*) were very similar to those made after other meetings which have been organised specifically with people experiencing poverty in mind. However, she was surprised to see that this may have not been the case - which would indicate how much more difficult it may have been for those who perhaps had not had so much experience in these types of meetings to fully participate.

The line between ensuring that enough support is put in place and becoming too patronising in the way in which we treat people is a fine one. However, ATD Fourth World believes strongly that if we want to eradicate poverty, we have to include the very poorest, the most difficult to reach. Therefore, the participation of the most vulnerable and weakest members should also be sought, and in general these are people who have not had an education, who have never had this type of experience and for whom an extra effort must be made in order that they can find their place. The big question is whether their participation is possible and welcomed in a meeting such as this and if so whether we are willing to go the extra mile in order to make it happen. This highlights the need for real investment in time and energy and the difficulties of adjusting to the time schedules of the policy-making process. Preparation is crucial to how well a meeting such as the SIF goes. Therefore, the capacity-building meetings that were organised in preparation for the forum are a really interesting part of the process. They served to get people's input from the ground in a different setting and manner to those of the forum. This is essential. However, it is slightly different to actually participating in the meeting itself. It is here that we need to be careful. If not, we risk giving the impression that there is real participation at the meeting when perhaps that is not entirely the case. *(OSI comment: However, people who directly experience poverty DO participate in meetings of the Forum.)* Therefore, if one of the aims of the SIF is to bring different levels of actors together, including people experiencing poverty, we have to be prudent in really evaluating how well this was achieved. From the evaluation, it would seem that there are some improvements that can be made.

It is more than just a question of hearing the voice of experience. It is also about empowerment, in order that people living in poverty can also benefit from the exchange. In that way, we can move towards a partnership approach with them. If we want to continue with this process of participation in Ireland and in other countries, then the issues of accountability and transparency really need to be addressed. One participant with experience of poverty wrote an evaluation after a few meetings in which she took part at different levels. She said that she "felt like a puppet that is used to help people write their reports". People in poverty and people who work by their side need feedback on how their participation has been taken into account. It is not an easy thing to come and share your life and that of others, about which you feel a deep humiliation, and then to feel as though this has not been taken into account or properly listened to. If we do not address this, the feelings of fatigue, pessimism and of being used will continue to occur. They will undermine the process and reinforce the views of an already distrustful public. Perhaps this is something that could be discussed further, drawing on the experience of other countries that have carried out similar initiatives, in order to see how we can go further in addressing this problem.

There are many projects and initiatives in Ireland and other countries that bring different stakeholders together in order to dialogue and create something together. All of these efforts should be recognised and supported and it would be interesting to draw on and highlight good practice – not only at a political level but also at others, including the very local level within people's communities. When we speak about participation, it is participation in one's immediate surroundings that we want also to achieve. We should aim to meet the specific objective laid down in the OMC – *"ensuring that inclusion policies are well co-ordinated and involve all levels of government and relevant actors including people experiencing poverty"*.

We should ask to what extent we want to involve people. The Social Inclusion Forum is a great first step and must be applauded and supported for managing to bring together such a wide spectrum of groups and organisations in dialogue. This is a strong starting point which can be continued to be built on and developed. She hoped that this Peer Review would enable others to learn from the experience and continue to develop the practice in their own countries - but keeping in mind all the other aspects that participation encompasses. Perhaps an even more ambitious approach is needed

- projects and initiatives that create things together with those living in poverty. We would then really be working towards the liberation of those who are denied a voice and place in society.

Júlio Paiva (European Anti Poverty Network, EAPN) highlighted three positive aspects of the SIF which might be relevant to other countries:

- The Social Inclusion Forum (SIF) could provide an important and positive example of practice in relation to objective 3 of the OMC for social protection and social inclusion: *mobilisation of all actors and stakeholders, including people experiencing poverty*, in the development of social inclusion policies. The SIF provides a *formal* opportunity for a range of stakeholders, including policy-makers, people experiencing poverty and groups representing them, to directly engage on specific issues related to addressing poverty and social exclusion outside of the more limited opportunities provided by the normal social partnership process.
- The *provision of resources to national anti-poverty organisations* by the Combat Poverty Agency to directly support the participation of people experiencing poverty and local groups representing them, so that they have had *some* opportunity to contribute to consultation processes for developing the NAPInclusion, and to prepare and contribute to the SIF even if they were not all able to participate directly on the day itself.
- The *participation of high-level organisations* in planning the SIF is important in being able to attract representatives from Government Departments and agencies and other stakeholders to the SIF and offers a better possibility of mainstreaming the results into the social inclusion policy process at national level.

EAPN Europe highlights four main areas:

- Clarifying the Objectives
- Reinforcing participative methodology
- Ensuring policy impact
- Monitoring and evaluation of the SIF.

Analysing more closely the second of these points, reinforcing participative methodology, he emphasised that the involvement of people experiencing poverty in preparatory meetings, feeding into the SIF, is a positive step forward - particularly in terms of providing vital resources to grassroots NGOs to support participation. However, more could be done to support direct participation in the SIF, making it a place where people experiencing poverty feel comfortable and are listened to, and their views are taken into account. The experience in EAPN has highlighted the importance of a “two-way” effort. Governments and other stakeholders need to be prepared to work in different ways and to move out of their comfort zone. The main SIF could look again at its methods, so as to enable more direct participation of people experiencing poverty, in the meetings. This means understanding what motivates people to participate in this kind of event, the obstacles they face, their expectations and fears. It means ensuring that the process delivers results. Otherwise, false expectations are raised, undermining future attempts to involve them in similar events.

He highlighted some important policy issues that are being raised and debated in the European Anti-Poverty Network:

- The participation of people experiencing poverty and social exclusion in policy development and ways of strengthening this participation are core to the work of EAPN. This is something that needs to happen at all levels of policy making, but which must be real and lead to change in policy and impact on poverty.
- The impact and outcomes from engagement with policy processes is an area which constantly needs to be monitored and reviewed.
- Information exchange about ongoing initiatives and the implementation of social inclusion policies should be established, so that local and regional policy-makers together with NGO networks share knowledge and experience to find the right solutions.
- The proposed policy measures on people experiencing poverty and social exclusion should be placed in a comprehensive framework, in consultation with NGOs, with expected outcomes, deadlines and a budget allocation etc, in order to facilitate implementation and monitoring.
- Coordination with other key actions and measures promoting social inclusion and particularly participation needs to be emphasised.
- In a broader policy context, the level of engagement with policy, strategies and methods related to social inclusion and its impact on mainstream policy such as economic policy is an area which constantly needs to be addressed at a national level and in the context of the objectives of the Lisbon Strategy.
- The resourcing of organisations representing people experiencing poverty and social exclusion, mainly by the government, is extremely important in ensuring that these communities have a say in influencing the development and implementation of policy.
- Local funding for projects provides an opportunity to mobilise national networks to address excluded people's needs in a concrete way, i.e. by drafting a proposal, with a budget, with deadlines. Although such funding sources do not represent important amounts, they are a good way to involve people experiencing poverty and social exclusion at the local level, so they can learn about working with institutions. Structural Fund money, particularly the use of global grants through the European Social Fund, could play a significant role in this.

He summarised EAPN Europe's perspective on the SIF as follows:

- The SIF model is useful but should refocus its objectives away from information exchange towards developing a model of participative democracy which inputs into policy development and delivery. It should draw on the findings and experiences of other measures which promote participation in the social inclusion policy. The challenge is also to look beyond one-off events, and to see the SIF as one element of an entire integrated process.
- More efforts need to go into linking the social inclusion agenda with the broader overarching economic one. Links should be made both with the Lisbon process (e.g. the National Reform

Programme) and with ensuring that finance and economic ministers and officials are drawn into direct debate with the people experiencing the results of their policies.

- The methods employed are useful, but could be developed further, particularly in ensuring that all groups of people experiencing poverty are able to participate and engage in direct discussions with decision-makers and other stakeholders. This means reassessing methodologies, strengthening the infrastructure and services provided for the workshops, and ensuring more balanced participation from target groups of people experiencing poverty.
- Evaluation and monitoring linked to impact assessment are vital, and are likely to encourage greater credibility for the process as well as ensuring that it delivers on its objectives, but care needs to be taken to involve all stakeholders and make use of participative methodologies and indicators.

Finally, he proposed four questions for consideration by the Peer Review:

1. What should be the main objectives of the SIF? Policy development or information exchange? If the former, what changes need to take place in the process and structure to ensure policy impact?
2. How can the monitoring and evaluation process ensure that stakeholder views are taken on board through participative methods and a systematic assessment made of the impact on policy?
3. How to strengthen the participation of people experiencing poverty and organisations representing them in policy-making? What lessons can be learnt from the SIF and other examples of innovative methodologies, structures and processes which facilitate active participation of people experiencing poverty in the policy-making process?
4. What work could be done on indicators of participation (both in terms of participation in society and in policy-making) that would allow for a better assessment of the impact of a tool such as the SIF?

### Initial reactions to the SIF

**Paul Ginnell** (EAPN, Ireland) stressed the need to ensure that inputs from people facing poverty really do find their way into government policy-making. At the last two SIFs, some of the papers from the preceding regional meetings were available. At the 2007 SIF, twenty people who had previously participated in the EAPN's focus groups would be taking part. EAPN had met them the day before the Peer Review, and had done some preparatory work with them for the SIF. This is an important way of ensuring real consultation, and could also be seen as part of the broader support that the Irish government provides at the national and local level. The government should be encouraged to continue funding such initiatives.

**Chris Burston** (Department for Work and Pensions, UK) thanked the hosts for the opportunity to see the SIF at first hand. His first impressions were that the preparatory work for the forum is very thoroughly done, that adequate funding is made available, and that social inclusion is accorded high priority by the Irish government. The fact that the social inclusion committee is chaired by the

Taoiseach and the forum is opened by a minister had particularly impressed him. However, he had found the workshops rather less focussed than he had hoped. He had gained the impression that a conversation between government and the people was under way, rather than an attempt to really get beneath the surface of the poverty phenomenon. Overall, however, he saw the SIF as a very useful initiative.

**Johan Vandebussche** (Deputy Director of the Cabinet of the Federal Minister for Social Integration, Belgium) had the impression that most of the SIF participants are professionals or semi-professionals who are working with social groups to which they themselves do not belong. He asked if that is the case. He also wondered exactly who qualifies as an NGO. In Belgium, there are groups of about 15 people living in poverty who meet once a month and also call themselves an NGO. Is that the case in Ireland? Or does "NGO" in this context mean a subsidised organisation of a certain size working at the local or national level? How do these organisations gain admittance to the SIF? Is there some kind of selection? Do they have to take part in preparatory meetings? Or can anybody who is free and feels like it come along? In Belgium at least, representativity is an important element in the discussion about social partnership. Does the same apply in Ireland?

**Laco Oravec** (Milan Simecka Foundation, Slovak Anti-Poverty Network) admired the synergies created within the SIF. At his discussion table, the dialogue between the facilitator, who was a ministry representative, and the community representatives had been excellent. In Slovakia, such conferences often lead nowhere. But here, he has the impression that real progress was being made. However, he was still a little confused about how the roundtable and the workshops would feed into the final conclusions at the end of the day. He also felt that the SIF organisers should be very tough on anybody who speaks for longer than their allotted time, as there are so many participants who have useful remarks to contribute. He had been disappointed by the small amount of time left for discussion in the workshop he attended. In the same spirit, he wondered if one day is really long enough for the SIF. And should it not move around the country to areas of poverty, rather in the way that the European Commission's roundtable on social inclusion moves around? Might that not promote the engagement of more people? As Ireland was one of the first countries to implement a National Action Plan on social inclusion, he would like to know more about how Irish public opinion reacted to it. Was there, as in Slovakia, any feeling that a European bureaucracy was trying to impose a social agenda? Do the municipalities participate in the SIF? In Slovakia, the municipalities play a very strong role in social inclusion.

**Jana Tomatova** (Ministry of Labour, Family and Social Affairs, Slovak Republic) praised the level of participation in the SIF, and the structure that has been created so far. Everybody seems to know what their role is, and those roles go together very well. However, during the morning session, she had found herself wondering what is taken away from the SIF by people other than government officials. What feedback do they get? In her workshop, she met mainly people from ministries, very few from organisations providing services to those in poverty, and none who seemed to be experiencing poverty or exclusion at first hand. Are local government and local enterprises treated as stakeholders in the SIF process? Up to now, she had the feeling that it was more about the presentation of national policies, and less about their implementation. In Slovakia, most of the implementation of social inclusion policies takes place at the local level.

**Marie Guidicelli** (Fondation de l'Armée du Salut/Salvation Army Foundation, France) found the roundtable and workshop formats used during the SIF very effective. The roundtables facilitate debate between people who do not know each other. In the workshop that she attended, the presentations were short and there was ample time for discussion. The presence of NGO platforms at the SIF was certainly useful, but she too had the impression that the people attending it were mainly

professionals, rather than people who were themselves experiencing poverty. The problems mentioned in the workshop that she attended were very similar to those in France – problems of information, funding and regional disparities. So she was keen to see what answers the SIF process will find to them.

**Deyan Kolev** (AMALIPE – Centre for Interethnic Dialogue and Tolerance, Bulgaria) appreciated the efforts undertaken to make the decision-making process more participatory and achieve effective partnership. Ireland has clearly done some excellent work on this. He asked what steps are taken to ensure that the views expressed at the SIF are taken into account by those who make the decisions. Also, what is the SIF's main aim – to hear the voice of the people who work with those experiencing poverty or to hear the voice of the people who are experiencing poverty?

**Sarah Welford** agreed that these are two quite different things. If we really want the participation of people who are experiencing poverty, we have to put the conditions in place that will ensure their participation. This entails preparing them for the meeting, but also preparing the other participants. At first, her experience of the roundtable had been quite positive, and the policy-maker who was at her table really seemed to be interested. However, the questions put to the roundtable had been formulated in very exclusive language. Somebody not working at the policy level would not understand them. Somebody had told her that the questions were much simpler at the 2006 SIF. In the workshop, the dialogue was very high-level and included a lot of statistics. Again, somebody not working at that level would feel very excluded from the conversation. Most people who are experiencing poverty would not summon up the courage to speak at a meeting of that kind. In terms of stimulating dialogue among NGOs, and between NGOs and government, the SIF works very well. But as far as the involvement of people experiencing poverty is concerned, she felt that there is still a long way to go.

**Monika Natter** (ÖSB Consulting GmbH) commented that her experience in her group was very different to those described so far. It included participants from previously organised courses for deprived women. The facilitator had shown great commitment and had translated each of the questions into plain language.

**Peter Kelly** (The Poverty Alliance, UK) agreed. The workshop that he attended was perhaps rather too large for the kind of discussion sought, but nonetheless that discussion was excellent. The officials were very responsive and seemed to take on board everything that was said. He had the impression of a very open, honest dialogue. There were also two excellent speakers within his workshop who clearly had first-hand experience of poverty. When talking about people's capacity to take part in such events, we should bear in mind that it all comes down to the resources that are put into preparing those people. He wondered if the SIF really is part of a wider process. He had the impression that it is an excellent forum, but something of a standalone.

**Elena Kremenlieva** (Ministry of Labour and Social Policy, Bulgaria) said that, as she comes from the government, she is used to accepting criticism. So for the present, she would make only positive comments. What she experienced, particularly in the workshop on people of working age and employment, was excellent. There was very good participation. She emphasised that NGOs do not exist in a vacuum. They represent somebody or work with somebody, and their power derives from those people. The most important thing that she would be taking away from the workshop was the respect that all the participants showed each other. The representative of the Department of Social and Family Affairs in that workshop had not been there just to field criticisms and defend existing policy, but to engage in constructive dialogue about ways to improve that policy. She felt that the time

had been sufficient, and she had been impressed by the cross-cutting way in which the problems of different groups were tackled.

**Elvira González Gago** (Económicos Tomillo, Spain) shared most of the positive opinions expressed. She had noted a positive, constructive spirit during the roundtables. She thought it would be difficult to generate a similar spirit at a comparable event in Spain. The SIF was well organised, but clearly still had a lot of work to do. In Spain, the multiple nature of poverty is much discussed, but she had not heard any mention of this in the SIF – how education relates to employment, and how both of them relate to social services and housing. She asked how the Department of Social and Family Affairs works with other Irish ministries on these issues, and what relationship exists among the various ministries within the SIF.

**Györgyi Vajda** (Ministry of Social Affairs and Labour, Hungary) was also impressed by the preparation of the SIF participants, and by the forum's participative working methods, which are not yet very much to the fore in Hungary. She asked if the SIF receives much media coverage, and whether there is a press conference or other attempts to stimulate public awareness. She also wondered how far the Irish social inclusion strategy is influenced by the European one and how far people experiencing poverty participating at the SIF are aware of the European social inclusion strategy.

**Monika Natter** said that the various questions raised would be addressed at the following morning's session.

### Continued participation in the Social Inclusion Forum

*The peer reviewers then returned to the Social Inclusion Forum, where they listened to the feedback from the workshops, the open discussion and the concluding remarks.*

## Day 2

### Continued Peer Review discussion

Irish participants responded to the points raised by peer reviewers at the previous afternoon's session. **Gerry Mangan** said that initially the fact that the first Irish National Anti-Poverty Strategy (NAPS) happened at all had been almost as much appreciated by public opinion as the way in which it was conducted. In particular, regional consultations produced a favourable response. Reactions were similar when the plan was revised in 2001-2. When it came to preparing the first National Action Plan for the EU in 2001, there simply was not time for consultation, but then consultation was in train for the revised NAPS introduced in February 2002. But the second time around, consultations were organised in the regions, and this time there was a greater consciousness of the quality of the process. On the basis of previous experience, it was felt that too much time had been taken up by major speakers and interest groups, leaving little time for discussion. In September 2006, further regional consultations were organised, but this time it was made clear that no more than 30 minutes would be available for inputs from various representatives. This was certainly an improvement. People felt that there was more time for discussion and for drawing conclusions. Regarding the representativity of participation at the SIF, he pointed out that, before it came into existence, a separate National Economic and Social Forum (NESF) had been set up, whose mandate was to

advise on policies to achieve greater equality and social inclusion within the context of the social partnership arrangements. So represented in that forum are the social partners – employers, trade unions, farming bodies, the community and voluntary sector, but also parliamentarians. They meet and discuss a range of mainly social issues, on which they produce reports. These include local development, unemployment and the delivery of services. The idea of creating the SIF was to create a different kind of forum, in which people would simply be invited to take part. The OSI is in the SIF in a supportive capacity. But the National Economic and Social Forum recognises the importance of the OSI's input, and over the years it has been assigned more and more time and resources to shape the SIF in ways that it sees as helpful. For the OSI, it is clearly a great opportunity to consult with people. That is the context within which the process had evolved.

Regarding participation, the OSI recognises the need to achieve a balance between the various categories and particularly to increase the representation of people experiencing poverty. Politicians are keen to encourage that, because people experiencing poverty can have more credibility talking about their problems than others have. Achieving such representation is not easy. It requires a lot of work and organisation. For example, the public servants and official representatives taking part in the SIF will regard it as a working day, but people experiencing poverty may have to take a day off work in order to attend, or they may have to get somebody to mind the children. They may also have transport problems. These are the kind of barriers that are difficult to overcome, and any suggestions from the Peer Review for tackling them would be welcome. Also, people experiencing poverty tend not to be as articulate and confident as other people. They may find it difficult to put their views across in a forum also attended by more educated participants. So valuable experience will not find its way on to the record. A lot of resources have to go into preparing people. One technique is to videotape conversations with people who are experiencing poverty, which shows them speaking to best effect in a relaxed, confident way. If we want to hear from people experiencing poverty, we have to be creative.

On the effectiveness of the arrangements for promoting discussions and exchanges, the SIF has been experimenting with various formats. He agreed that the groups at the 2007 SIF were too large. Perhaps there should be several workshops on each topic – for instance, four instead of one.

Organising the reporting back can be difficult. So he felt that it is better simply to record the whole discussion, as is done for the SIF and described by Carmel Corrigan.

The impact of the SIF is difficult to assess. The feedback provided is very valuable, but the real value for participants is that they will come away from the SIF with a better understanding of the issues, hopefully from a wider perspective.

The preparations needed for a forum of this kind are in themselves a positive reason for holding one. It must be a catalyst that drives action at local and national level. The reports from the SIF may have a greater impact if they are better tied into the monitoring of the National Action Plan. For example, there could be a practice of reporting back to one year's forum on the extent to which the plan is covering the suggestions made the previous year, and the progress made.

The Office for Social Inclusion has a staff of ten, so organising an event like the SIF can involve marshalling additional resources.

In response to the questions about the objectives of the SIF, **Eamonn Moran** (OSI, Department of Social and Family Affairs, Ireland) said that is not a case of providing *either* a mechanism for developing policy *or* a means of information exchange, but rather of providing both. The rationale for

the SIF is certainly to provide all stakeholders with an opportunity to hear about the NAPinclusion process, but it also exists to enable them to have their views on policy and implementation issues heard by government officials and others, and to give people an opportunity to suggest new or better policies. The SIF is part of a broader process in relation to NAPinclusion, of which a good explanation is given in the discussion paper provided to the Peer Review by the thematic expert Hugo Swinnen. Eamonn Moran recommended the diagram in Appendix I of that report as a clear overview of the structures involved.

On the issue of encouraging people experiencing poverty to take part in the SIF, he said that the key to success is in the preparation by the NESF, the OSI and other bodies. Without capacity-building, it would indeed be difficult for people experiencing poverty to participate in a forum of this kind. Also, a lot of material is provided in advance to the participants, to give them a flavour of the subject matter and help them to pinpoint a few key issues.

In reply to the question about who attends the SIF, he said that an analysis of the 250 people registered for the 2007 forum showed that a little over half of them were from the non-statutory voluntary and community sector, including both people who were themselves experiencing poverty and representative groups. About one-third were from eight government departments, a number of municipalities and some other statutory bodies. The remaining 15% were from non-statutory organisations representing local areas. So there was a fair spread of representation.

Regarding the extent to which the various government ministries support the overall project, he explained that senior officials from the relevant ministries attend the SIF and its workshops and are there to engage with the other representatives. They are also part of the group of senior officials at national level to whom the report of the forum is sent. Most government departments have a social inclusion unit or a social inclusion liaison officer who ensures that social inclusion issues are disseminated within that government department.

On SIF participants' awareness of the EU social inclusion framework, he thought that it is in general not very high. However, he felt it is probably not essential for them to be aware of it. It is more important that they see, operating on the ground, the results of the Open Method of Coordination and of the facility provided for Member States to share best practice. Naturally, officials in ministries and municipalities are very much aware of the EU process. Organisations such as EAPN do receive EU funding to carry out awareness-raising action in relation to key elements of the social inclusion at the EU level. There is certainly no attempt by Irish government to avoid spreading the EU message, but there is a need to prevent information overload by ensuring that people have the appropriate level of awareness. The various OSI and NESF websites provide details both of the EU process and of the SIF.

**Carmel Corrigan** felt that the representativeness of SIF participants has improved year by year. In particular, the representation of people in poverty has increased every year. The capacity-building done by organisations such as EAPN is absolutely central to that. The overall aim of the SIF is to mobilise all relevant actors. Therefore, it must bring a range of people together. While recognising that the proportion of people who have experience of poverty needs to be increased, its function must be to bring them together with other categories of participant. The SIF does not ask participants what their status is, and whether they have personally experienced poverty. There is a very long tradition in Ireland of NGOs, whether local or national, being founded, driven, staffed and led by people who themselves have experience of the issue concerned. For example, one of the organisations represented at the 2007 SIF was OPEN, the One-Parent Exchange Network. Many of the people working in OPEN are or have been lone parents. They are therefore very well aware of the issues

facing lone parents. But they will not necessarily tell people at the SIF about their personal experiences, because they are representing an organisation. So it is not always easy to identify people who have personal experience of poverty.

On the way in which the report of the SIF is prepared, she said that she would, the following week, be getting a transcript of everything that was said in these year's plenary sessions. She then summarises that into the key points of the presentations. She also has notes of the discussions in the different workshops, plus the scripts of the presentations in those workshops. These are compiled into workshop reports. The notes from the roundtables are analysed and the primary issues arising from them are categorised and tabulated. Even if only one person on one table mentions an issue, it gets listed. The report is then sent to the NESF. When they have signed off on it, it goes to the government.

Regarding participation by municipalities, she said that, up to the late 1990s, Irish local authorities did not have a specific anti-poverty or social inclusion focus to their work. Therefore anti-poverty work is still quite new to many municipalities, so they are coming in gradually. But their interest and participation in the SIF is increasing.

On the multidimensionality of poverty, she recalled that the previous day's workshop on communities had talked about adult education, education for children, direct provision, services for children seeking asylum, income provision, the right to work and the need for recognition of qualifications. That is the multidimensionality of people's experience of coming to Ireland. Involved are the Department of Education and Science, the Department of Justice, Equality and Law Reform, the Department of Enterprise, Trade and Employment, and the accrediting bodies. That multidimensionality will also be reflected in the new report.

**Catherine Hazlett** (OSI, Department of Social and Family Affairs, Ireland) said the SIF is under the umbrella of the social partners, and so involves many stakeholders who are at the centre of government and policy-making. That link with the parliamentary process and government is significant. Although there is a huge range of participants at the SIF, one of its strengths is the amount of informal networking. Her own experience was that people are interested and pleased to receive a detailed report of discussions in which they have been involved. This helps them to feel ownership of the discussion. The dilemma is that it is also important to capture the key points if there is to be any hope that they will be reflected in policy. So a balance needs to be struck. Given the National Action Plan for Social Inclusion, there is a clear need to reflect in its reports some of the comments that were made at the SIF. This can give people a greater understanding of how suggestions are or are not being implemented, as the case may be. Regarding awareness of the EU's social inclusion strategy, she had noticed that several of the participants at the previous day's SIF certainly had various attending EU officials in their sights. NGOs are very aware of the support available at the EU level and the fact that at least some of the social inclusion strategy will be driven at that level. She thanked the peer reviewers for their participation in the SIF and looked forward to what they would have to say about it.

## Presentation of the discussion paper

**Hugo Swinnen** (Thematic Expert – Verwey-Jonker Institute, Netherlands) thought that, the previous day, the Peer Review countries had appeared to be fairly critical of what happens in Dublin. He suggested that the Peer Review working groups at today's session should perhaps look more closely at their own experiences. Both the criticisms and the positive comments made about the Irish process could equally well be applied to those in at least some of the Peer Review countries. So the important thing now was to compare the different experiences and see what lessons could be learnt.

The fact that all Member States are now reporting to the EU, or feel embarrassed not to be able to report, on participatory methods of policy-making is largely thanks to the Open Method of Coordination and to the Commission. The involvement of stakeholders is at the very heart of the objectives of the OMC and of the development of national action plans. Those objectives are about the comprehensiveness of policies, the integrality of approaches, partnership between different government levels but also between different government departments, partnership between government and civil society, and the involvement of so-called "target populations". The difficulty of combining all these elements within one structure, system or process of governance may clearly be seen in the case of the SIF. People are indeed asking if it is about consultation, information exchange, building government departments, the relations between local and national government, or target populations. When preparing a forum such as the SIF, thought needs to be given to how to create inputs on all these aims and achieve an appropriate mix. This is certainly not easy.

The need for mobilising stakeholders and then finding indicators for participation, monitoring and evaluation is obvious. But he thought that two other aspects also provide extra stimuli to engage in discussion with stakeholders. One is the mainstreaming of social inclusion but also, within social inclusion, aims such as gender mainstreaming or the mainstreaming of child poverty. The mainstreaming objective provides an extra reason for trying to involve as many stakeholders as possible in discussions. The other is that the evaluation of social inclusion policies necessarily entails including stakeholders in the whole process of development and implementation of policies. For example, a government will need to know what happens in municipalities in order to evaluate its own social inclusion policies.

A few elements of previous Peer Reviews are mentioned in the discussion paper, notably in connection with stakeholder involvement. At the 2006 Paris Peer Review in particular, this issue was at the heart of the discussions. In his view, one important value in the Irish initiatives is the commitment to consultation and public debate. Crucially, the debate in the SIF is public and visible. This helps to keep social inclusion on the public and political agenda. National, local and regional involvement, and the links between these levels, is an important challenge for Ireland but also for all countries. Aspects of social inclusion are often increasingly devolved, including some of the monetary aspects. From the European perspective, it is important to look through national government to local government. This can be a difficulty, because a need then arises to assess local and regional policies as well as national ones.

Political visibility, public debate and the SIF as a bottom-up, top-down meeting point are among the elements that make the Irish experience a good practice. Social inclusion policy has a high-level profile within Irish government. Ireland's social partnership and the SIF are forms of multilateral, multi-issue, multi-active governance. Seen from other countries, Ireland's recognition of the community and voluntary sectors as full social partners is something precious and special.

An extra note<sup>3</sup> sent out just before the Peer Review concerned what he had chosen to call “actor involvement variables” – a very rough analysis instrument. Actor involvement includes at least these five aspects:

- Thought should be given to the question of *which actors to involve*. He had listed the different government levels, social partners, NGOs, the voluntary sector, people experiencing poverty and exclusion and their representatives. Careful consideration should also be given to *who should be involved for what reason*. Here, the stages of the process play a crucial role. Is it about policy development? Is it about decision-making on policy? Is it about the implementation of policies? Do we, for instance, want to involve NGOs as co-producers of social inclusion? Or is it about evaluation of the policies? Can we distinguish between these different possible moments of bringing people together, and the use that will be made of their voice in these different stages of the process?
- Then there is the *degree of involvement*, which is crucial for those engaged in participatory processes. People want to know what possibilities they have for exerting influence. If they are to be motivated to participate, they must know clearly what their position is. And if their position is an advisory one, they want to know what happens to that advice. Generally, people can accept the fact that their advice is not heeded, but they do need to know whether it is used or not. However, he dislikes the term “degrees of involvement”, which suggests that some forms of participation are on a higher level than others. He prefers to speak of a “spectrum of participation”.
- *The quality of the process*. This includes responsiveness: if people ask something or give advice, there has to be an answer, and they should be told the timeframe within which they can expect that answer. Dialogue is another key word. People will often want to discuss the answer. Face-to-face contact is important here. For example, if a mayor reports back in person about the action taken on a piece of advice from a community board, this creates dialogue and mutual understanding.
- *Political engagement* is another important quality variable. The fact that the minister opens the SIF clearly marks political engagement in this process. *Public visibility* is a further quality element, as are *adequate and coherent working methods*. The already cited technique of using video to give people a voice during public meetings is a good example of this, if used appropriately.
- *The preconditions for involvement*. These include continuous and basic support for vulnerable groups. Often, the most active members of groups for the unemployed or disabled people or lone parents go away after a certain time – perhaps because they have found a job. In a way, this is one of the most positive aspects of these organisations, but it does mean that they need continuously renewed professional support. Capacity-building has an important role to play here. But it must also be remembered that voluntary organisations have little spare time available to study papers and digest their contents. Time is a very precious commodity for these groups.

He suggested that the working groups should bear these points in mind when analysing practice in their own countries.

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<sup>3</sup> See Annex 1

Summarising the contents of the peer country papers, he had started with “particularities of countries”, but then had to put a question mark against that heading, because in fact there were not many particularities. There is a high level of commitment to involvement in each of the countries. The link between the national, regional and local levels seems to be a serious issue for a number of them. Most countries report that an active role is being played by anti-poverty networks, which would not have been the case five or ten years ago. Including vulnerable groups leads to innovative approaches and the discovery of the need for local social inclusion policies. An interesting remark from Hungary was that a good practice transferred from Belgium failed – apparently because the preconditions for using the practice concerned did not exist in Hungary. So this tells us that any transfer of elements of good practice needs to be accompanied by organising the conditions in which they can be implemented. One important remark in a country paper is that the engagement of stakeholders is an *essential* part of policy development. It is not just an extra. One comment to ponder is that stakeholder participation exercises can be organised as a purely government initiative, but it might be better for them to be organised jointly by government and civil society partners. An important question for the working groups would be whether the SIF and initiatives in other countries actually empower the stakeholders, or whether they simply have their say and then go home. And how should the most powerful government departments be involved in social inclusion policies? This is another key question for the working groups.

### Transferability aspects

*The participants split into two groups to discuss what could be learned from the Irish experience and how far it might be transferable to other countries. The groups then reported back to the plenary.*

Chris Burston reported that his group had raised a number of points:

- ***The SIF should not be seen as a one-off event.*** The preparation, resources and capacity-building that go into it stimulate a whole chain of smaller events. The idea of using a national forum to stimulate smaller-scale, more local activities on social inclusion might well be transferable.
- It was suggested that ***the allocation of time within the one-day SIF might usefully be shifted more towards non-governmental contributors.*** Joint ownership of the forum is important here. If government and NGOs are jointly responsible for the invitations to the event, this might help to achieve a productive balance.
- In Ireland, there is strong recognition of the ***role of civil society within social dialogue.*** This is not the case in all the peer countries, and this difference might limit the transferability of some aspects of the Irish policy.
- The SIF sets out to do a number of different things. There is an important ***“meet the people”*** aspect. ***Information exchange*** between different groups is another major element.
- There is a need for ***feedback*** on what has been achieved since the previous SIF. At each SIF, there could be reporting back on the progress achieved on a number of key points – perhaps five – from the previous forum.

- As regards the *NGOs* participating in the forum, a distinction needs to be made between those organisations representing people who experience poverty and those that provide services to them.

**Elena Kremenlieva** said her group had spent considerable time on country reports, and there had therefore been only a limited discussion of the transferability of the Irish policy. Nonetheless, a number of key points had emerged:

- ***Social inclusion policy is multidimensional.*** There is therefore a great need for coordination. The SIF is unique, but some peer countries have structures with a similar function. Others, though, are still considering how to involve the social actors in the process.
- Ireland's official treatment of *NGOs as full social partners* is unique.
- Strong *political commitment* is crucial to the SIF process.
- ***Information, consultation and participation*** are crucial to successful social inclusion. The Irish policy is a good example of how to achieve these aims.
- ***Dialogue must be continuous,*** and not just limited to set events. It must be a dialogue of equals.
- It is important that the type of *language* used in events such as the SIF should be close to that of the people participating in them. Jargon and long strings of initials should be avoided.
- ***Policy impact assessment*** is an important part of policy development. The tools used by Ireland to measure that impact merit further examination by peer countries.
- It is important to ensure that NGOs participating in the forum process are *representative* and cover the whole spectrum.
- ***Social inclusion is a long-term process.*** It therefore requires a lot of effort, resources and commitment.

### Relevance and key learning aspects for peer countries and stakeholder representatives

**Hugo Swinnen** suggested that the peer reviewers might propose quality criteria for this type of participation. In other words, how can all the actors be involved in an effective and efficient way in the social inclusion policy process? The recognition of the NGO role could also, in some countries, take the form of recognising what are called "lay experts". In other words, people experiencing poverty can organise themselves and come forward. A materialised recognition of these groups is very important. One form of recognition could be to give these actors a role in setting the agenda. All participation starts with the agenda. It may also be possible to facilitate the participation of lay experts in these processes, but problems can arise here. For instance, paying a lay expert for attending could lead to the expert's losing social benefits. Reimbursement of expenses, the provision of childcare facilities, and help with securing leave of absence from work are all ways of facilitating participation by lay experts in social inclusion. Another point raised in the working groups was that capacity-building is needed not only for people representing grassroots movements or people experiencing poverty but

also for social professionals and government officials. They need capacity-building in terms of how to better understand social inclusion from the perspective of people experiencing poverty but also how to organise consultation with NGOs and the grassroots. Training in the use of appropriate, understandable language might also be included. The continuity of participation processes is a sensitive point in many countries. Governments change, and governments' priorities change, but continuity is key to building trust and mutual understanding. A mix of big and small events is important. One-off events on their own will not ensure effective participation. The SIF is a good example of continuity. More reflection is needed on the issue of representativity. To represent a big NGO does not necessarily imply being representative of a specific problem. Nor does the opposite necessarily apply. Balancing participation between different types of actor also requires reflection. Perhaps the representation of certain types of actor will need to be restricted in order to assure that all types can be properly represented in meetings. A further quality criterion for initiatives could be that they are launched not by governments alone but by governments together with NGOs.

About language issues, he mentioned an incident that he witnessed during the previous day's SIF workshop on communities – an incident of a type that happens very often. Somebody made a proposal and the chairwoman tried to put it on the flipchart, but changed the phrasing in order to shorten it, which is a normal reaction. But if you rephrase a proposal, you take it away from the proposer. If the phrase appeared in a report half a year later, the person would no longer recognise his or her proposal. A basic rule for giving feedback on what people said is that it should be feedback on what they actually said, and not feedback on their remarks after they have been translated into jargon or bureaucratic language. On this point, he praised the reports of the SIF, which do not seem to contain much "translation" of this kind. In fact, they often use original quotes.

**Peter Kelly** commented that, during the "Get Heard" project in the UK, about 140 workshops were run all over the country, producing some 140 reports. Obviously, translating all of the individual views and comments into a single report was a significant challenge. Although one single comprehensive UK report was produced, a number other reports were also written in different parts of the UK. In Scotland, for example, some of the original participants were got together to contribute to the writing of the final Scottish report. As the person who had the final edit on that report, he received some criticisms for editorial decisions, but the process was an open one and the criticisms were taken on the chin. Again, this is an issue of legitimacy. If people are clear on how the feedback is being organised, who will produce the report and how they may play a part in that, it adds to the legitimacy of the process as a whole.

**Christiane El-Hayek** (Ministry for Labour, Labour Relations and Solidarity, France) felt that the political aspects of such exercises in active democracy had not really been discussed. Giving people in poverty the opportunity to express themselves in front of elected representatives and ministers is in itself a political message of equality. On some subjects, therefore, proposals for such exercises may not get much of a welcome. For example, in France, the trade unions object to direct participation of the unemployed within some bodies, as they argue that they already represent the interests of these groups. In the national forums already organised, there seems to be an obstacle to the direct involvement of people in poverty. But since the right to access government is written into the NAP, she feels that this European framework should now be used as an effective means of persuasion. **Peter Kelly** added that, when we talk about mobilising all actors, we should not only mean the trade unions. There have also been difficulties with involving the unions in these processes in the UK. In some of the processes the voice of the private sector also needs to be heard - and, obviously, challenged. **Johan Vandenbussche** said that, in Belgium, although social partnership is not limited to the trade unions, they are the most prominent element, as they argue that they represent the whole of the population. The employers tend to support that view, as they do not like structures that are

shifting and fluid. But his service tries to make sure that everyone who is concerned by a meeting is present. Also, the National Action Plan provides for the social partners to be present at the table. They seem to be less active on this, and less willing to attend. So sometimes, his service tries to do it the other way round – to get invited to the places where the social partners meet. Efforts are also made to involve stakeholders in preparatory meetings on the National Action Plan, but the success of this approach varies, depending on what the participants are being asked to do – to draw up an agenda or to approve a final policy document. A final method is to establish boards where the stakeholders have a formalised presence – for example, the boards recently set up for the users and providers of public services. In this way, groups which come from a different background can gradually be brought together. He recalled that successive EU presidencies have called on national governments to establish formalised boards where people experiencing poverty are represented – so yes, one can “use Europe” on this.

**Deyan Kolev** felt that such boards might have more chance of acceptance if it is emphasised that they are places where the people working with poor people can be represented, as opposed to the people living in poverty themselves. For keeping SIF participants in touch with the process after the event itself, he suggested that a table might be published one year later showing what had happened to the proposals made. This table could then be sent to the participants, together with a short letter of thanks for their ideas. He was sure that people would be very proud and happy about that. Sometimes, small things really matter. He also urged the European Commission to continue its efforts to provoke discussion within Member States on how to engage actively with civil society. All Member States, both new and old, should be pressed to move in this direction. **Peter Lelie** replied that the PROGRESS budget available to the European Commission makes provision for awareness-raising and mutual learning projects and for core funding of European stakeholder networks. In this way, the Commission contributes to strengthening civil society.

**Izabella Márton** wondered what was the better approach to social inclusion: to organise meetings with the broadest possible representation of stakeholders, or to hold meetings solely between policy-makers and people experiencing poverty? Providing separate opportunities to lobby legislators might give people in poverty a better chance of getting a hearing, rather than mixing them in with professionals. **Hugo Swinnen** replied that both approaches are equally necessary. There is a need to organise, in a more structured and continuous way, the voice of people experiencing poverty. But at the same time, if an event like the SIF is organised, it would be unthinkable that the voice of people experiencing poverty should not be present. The issue is *how* to bring that voice into such a meeting. All stakeholders should be treated equally, as each of them has something authentic to say on the social inclusion process. **Johan Vandenbussche** argued that politics is about power. So empowerment has to be at the centre of the concept. Poverty is not a state that anyone wants to remain in for the rest of their lives. It is not a separate status, it is a hindrance in exercising one's rights. So the State has to ensure that the voice of people experiencing poverty is heard at the same level as the other voices. In the long run, this means creating a roundtable where everyone is present. His service is for all the partners and it must dialogue equally with all the partners. In the case of people experiencing poverty, this means moving them forward a little so that they get the same hearing as the others. That is what empowerment is about.

## Concluding remarks

This had been a very wide-ranging discussion, **Peter Lelie** said, and he would not try to summarise it. He wished simply to offer three short remarks. Two of them are based on conclusions that he drew also from previous Peer Reviews. The third would then link to the European level.

The first is the importance of site visits. A site visit during a Peer Review always gives added value. You learn things that you would never be able to learn just from written documents. This particular Peer Review had taken the concept of the site visit to a higher level by allowing full participation in the Social Inclusion Forum. All the reviewers had very much appreciated that possibility. It had given them a good feel for what the SIF is all about as a mechanism for participation. It had also provided a good overview of the challenges that Ireland is facing as far as social inclusion is concerned.

Secondly, he wanted to stress the importance of independent evaluation of policies and institutional arrangements. Each Peer Review emphasises that point, and he felt that it might also be useful in the case of the SIF. On the criteria for good-quality participation, one conclusion reached by the present seminar is that good-quality participation does not drop from the sky. You need to work on it. The preconditions for good participation start with having clear objectives, having resources to support the process, empowering people, and ensuring feedback. The evaluation framework proposed by Hugo Swinnen is very helpful and could usefully be built on.

His third and last remark was on linking to the European level. Looking at the 2007 Joint Report on Social Protection and Social Inclusion, one of the conclusions with regard to governance and participation in the development of the National Action Plans is that progress is being made on the establishment of procedures for participation, but that we need to focus more on the quality of participation. In this respect, a number of challenges will be faced in the near future. The next round of National Action Plans will be in 2008, so he suggested that the conclusions of this Peer Review might be used when preparing the guidance for those plans and when analysing the plans themselves, later in the year. Member States may be looking to Europe to stimulate participation, and we should take up this challenge. Just the fact of holding this review had shown the level of interest in the issue. It was one of the reviews which the most Member States applied to attend. The next cycles of National Action Plans will be spread over three years. So there will be two years when, the Commission will have no real opportunities for engaging with civil society and people experiencing poverty concerning the National Action Plans on the level of the Member States. This is a challenge that needs to be taken up. Of course, during the upcoming cycle, starting in 2008, the European Year for Combating Poverty and Social Exclusion 2010 will present an important opportunity for working on participation. Another challenge to be faced at the European level is linked to the recent streamlining of the 'social OMC's'. This could be an opportunity for more participation in the two other strands of the 'streamlined' OMC (pensions and health and long term care), or it could be a threat to the participation that has already been obtained in the OMC on social inclusion.

He thanked the participants for an active debate, and the hosts for providing the peer reviewers with this opportunity to come over and study the Social Inclusion Forum.

**Gerry Mangan** thanked the peer reviewers for their visit and the opportunity to listen to their comments and feedback. The openness and honesty of the constructive critique presented had been greatly appreciated. The lessons that Ireland could draw from the review included the fact that the peer reviewers feel the SIF is good enough to continue and this instilled confidence to continue and improve the process.

The hosts themselves are conscious of the need for more preparation for the SIF. That preparation is a process in itself, which can link people and give them an opportunity to express their views. Clearly, the level of resources is a constraint on the amount of preparation that can be done, but that too is a challenge to be addressed. In terms of participation in the SIF, the review had given the hosts a great deal to think about. Clearly, there is a need to include many more people who are experiencing poverty, although this does raise some difficulties. Legitimacy is also important – the participants should be credible representatives of specific groups experiencing poverty. Social partners should also be represented given their impact on Government policies and the resulting implications for social inclusion. The National Action Plan could provide the grounding for the SIF process and be part of the monitoring exercise.

In another consultative process in relation to the family, his Department asked three simple questions. The question “What are we doing well?” was put up front. People did not like that at first, but after a while they did list things that they appreciated. Then came the second question: “What’s wrong?” People were more comfortable with that question, but were able to deal with it in a more rounded way after answering the first one. The third question was “What do you want changed?” and that mainly did result in more constructive, balanced proposals. There are thus advantages in getting people to approach consultative exercises in a positive way.

Useful feedback had also been received from the Peer Review on the organisation of the SIF itself: the importance of reporting back on previous forums, the need for smaller groups and the importance of networking. If the forum is well prepared, more time will be freed up for networking. This does raise questions about mobilising resources, which is a challenge in itself.

As for the Irish perspective on the European dimension, it is always helpful in Ireland to get an EU view on something. The advantage of the questionnaire is that can suggest to people what the criteria should be.

He thanked the reviewers for coming to Ireland, and all the organisers for their work. The hosts had learnt a great deal from the Peer Review, and he hoped the visitors had done so too.

## Annex 1: Actor involvement variables:

- 1) Actors to involve:
  - a) Different government levels
  - b) Social partners
  - c) NGOs
  - d) Voluntary sector (professionals)
  - e) People experiencing poverty and exclusion / their representatives
  
- 2) Stages of the process:
  - a) Policy development
  - b) Decision making
  - c) Implementation
  - d) Evaluation
  
- 3) Degree (spectrum) of involvement:
  - a) Information
  - b) Consultation
  - c) Advice
  - d) Co-production (of plans)
  - e) Co-determination
  - f) Self-management
  
- 4) Quality of the process
  - a) Responsiveness
  - b) Dialogue
  - c) Political engagement
  - d) Public visibility
  - e) Adequate and coherent working methods
  
- 5) Preconditions for involvement
  - a) Basic support (professionals – money...)
  - b) Capacity building
  - c) Time