

Report of the German National Stakeholder Meeting

Date: 21st of November 2012

Place: Technical University Berlin, Department of Sociology

Participants:

<i>Peggy Letzner</i>	Bundesministerium für Arbeit und Soziales (BMAS), Federal Ministry for Labour and Social Affairs
<i>Carola Schmitt</i>	Arbeiterwohlfahrt (AWO), Nonstatutory Worker's Welfare Organisation
<i>Michael Schröter</i>	Diakonisches Werk, Nonstatutory Welfare Organisation of the Protestant Church
<i>Martin Heidenreich</i>	COPE Team, University of Oldenburg
<i>Norbert Petzold</i>	COPE Team, University of Oldenburg
<i>Dorothee Spannagel</i>	COPE Team, University of Oldenburg

Missing:

Michaela Hofmann	Deutscher Caritas Verband; Nonstatutory Welfare Organisation of the Catholic Church
Rudolf Martens	Deutscher Paritätischer Wohlfahrtsverband (DPWV), Nonstatutory Welfare Organisation

Summary of the meeting:

The first part of the meeting dealt with the presentation of the COPE project. Martin Heidenreich gave an introductory overview of the main research aims and the organisational structure of COPE. This was followed by a description of first findings on minimum income schemes in the countries that participate in the project, presented by Dorothee Spannagel. Especially the comparative view on the German scheme of unemployment benefit (ALG-II) was discussed, mainly with regard to the core differences to the other minimum income systems. Michael Schröter (Diakonie) raised the issue that it might be helpful for the COPE team to let politicians who were involved in the implementation of the ALG-II scheme have a look at the national report on the institutional structure of the German minimum income system, which the COPE team had sent to the national stakeholders in advance, in order to check the trajectory of the political decisions.

After the lunch break the meeting continued with a short presentation of the next steps concerning the interviews. Norbert Petzold described the research interest of the interviews, the methodological proceeding and gave a brief overview of the interview schedule. Especially the list of interview partners was discussed intensively. The stakeholders provided the COPE

team with a comprehensive list of further persons who might be of interest for the national interviews.

In the last part of the meeting all participants discussed vividly about the presented information and the further research steps. One focus of the discussion was on the National Report on Poverty and Wealth which was distributed for reviewing purposes by Peggy Letzner (BMAS) right the day before the stakeholder meeting. The stakeholders gave an interesting insight into the decision-making processes that lead to the final National Report on Poverty and Wealth. The second main issue of the discussion focussed on holes in the German safety net. Peggy Letzner described that since 2005, i.e. since the implementation of ALG-II, 1.9 million households permanently received ALG-II benefits. All stakeholders pointed out that these recipients face severe problems on the labour market which are not appropriately dealt with by the existing training programs and social services. They stressed the need of special measures that are targeted at these persons. Their main aim should be on leading such persons back into the labour market by taking into account that this has to be done in small steps. The stakeholders unanimously rejected the idea to transfer these persons into social assistance schemes as they are well able to be employed if they were supported on their way back into the labour market. All stakeholders suggested including this population group into the research focus of the COPE project in order to explain the mechanisms that lead into such a precarious situation.

All participants judged the national stakeholder meeting as very fruitful. Especially the intensive discussions were the great benefit of the meeting. Above all, the comparative overview of minimum income schemes was regarded as interesting by the stakeholders. The COPE team benefited very much from the insight the stakeholders gave into governmental issues of national anti-poverty policies in Germany and especially from their concrete advice for further research on the national arena of combating poverty. All committed to collaborate closely in the next steps of the COPE project.

UK national stakeholder meeting – report

A Attendance

Members of the National Stakeholder committee and others present at the meeting:

MD	Marion Davis	One Parent Families Scotland
MK	Maggie Kelly	Poverty Alliance
MS	Mike Stewart	Centre for Social and Economic Inclusion
FB	Fran Bennett	UK Independent Expert on Social Inclusion for the European Commission
SW	Sharon Wright	Academic, Stirling University
AS	Adrian Sinfield	Academic, University of Edinburgh, former chair of Child Poverty Action Group
SS	Stephen Sinclair	Academic, Glasgow Caledonian University
AG	Alexander Goerne	COPE team, University of Edinburgh
DC	Daniel Clegg	COPE team, University of Edinburgh

Apologies were received from the following members of the National Stakeholder committee:

AY	Alex Young	Scottish Government, Poverty Analysis Unit
CW	Camellia Williamson	Department for Work and Pensions, Social Justice Strategy

B Brief summary of the meeting

DC kicked off the meeting by welcoming all participants and briefly outlining the purpose of the national stakeholder committee, the schedule of stakeholder events in COPE, and the structure of the meeting.

The first item on the programme was a short presentation by AG about the general aims of COPE, of its structure and of how the national-level analysis currently in progress relates to other work packages. The presentation gave rise to a lively discussion, where two key issues in particular emerged. First, how is Active Inclusion defined – is it related primarily to labour market integration, or is it defined in a wider sense? MK and FB both expressed that they felt the concept is not limited to (and should not be limited to) minimum income claimants. In any case, the discussion addressed to what extent is it necessary to have a substantive definition of Active Inclusion, against which MIP systems' performance can be evaluated? Secondly, there was a discussion as to how useful it is to focus on the three groups of long-term unemployed, single-parents and the working poor. MD pointed out that these groups overlap in reality, and it was also discussed that some of the categories refer to individual situations (long-term unemployment), others to household type (single parents) and other still to both (working poor). It was also discussed how far these categories miss out certain crucial dynamics of working-age poverty, such as those related to 'low-pay-no-pay' cycles.

After this first round of discussion, DC presented the analytical framework for studying Active Inclusion reforms in the five COPE case countries, which was followed by another lively debate. One key issue raised by a number of people was the development of deservingness perceptions among British voters, and how far they impact on policy decisions regarding different claimant groups. It was pointed out that the recent government rhetoric opposing 'shirkers' and 'workers' hadn't prevented severe cuts in tax credits, which benefit those in employment.

This discussion concluded the morning session, which was followed by a lunch break. In the afternoon, the meeting continued with two open thematic discussions, moderated in turn by AG and DC.

The first discussion, chaired by AG, centred on the evolution of the system of benefits and services for poor people of working age in the UK more generally. A key discussion point was how participants assessed the introduction of Universal Credit in Autumn 2013. The high level of expertise assembled around the table produced a rather controversial debate, which was however highly fruitful. The general tone was critical as to the consequences of Universal Credit from the vantage point of improving Active Inclusion, however the discussion also highlighted some areas in which the reform is though likely to improve claimants' situation. Potentially higher take-up and simplification of the claims process when taking up low-wage or low-hours employment were seen as the main positives. The principal concern expressed was whether the new system would be sufficiently capable of taking into account special situations of single parents of long-term unemployed claimants with complex needs. Also, it was questioned whether increasing conditionality for low-hours workers is sufficient step for tackling in-work-poverty. Another key theme in the debate whether Universal Credit actually constitutes continuity with attempts under the previous Labour government to introduce a so-called "Single Working Age Benefit". While there was agreement that the general direction of travel is similar under Universal Credit and Single Working Age Benefit, some participants highlighted crucial differences, including an even stronger reliance on means-testing (as opposed to contribution-based benefits) under Single Working Age Benefit plans.

The second thematic discussion, chaired by DG, focused on issues of multi-level and multi-actor governance of benefits and services in the UK context. The debate was particularly enriched by the Scottish members of the National Stakeholder Committee, who shared their detailed knowledge of attempts to create joined-up service provision during the time of the 'Glasgow Works' project, which at the time constituted an important example of municipally-led innovation in the area of anti-poverty and employability services. Further discussion points included the functioning of the current market for employment services in general, and practices of large private providers in particular. Looking into the future, participants discussed whether we are currently observing a trend towards municipalisation in the area of welfare benefits and services, and whether this potentially looks different in England and Scotland. A further important issue for WP5's national level analysis, it was discussed whether parts of the provision of minimum income services in Scotland will become the responsibility of social workers, possibly moving Scotland more into the direction of the Nordic countries. Finally, there was an enlightening discussion of how the participatory modes of governance that had been inspired by the EU OMC articulated with mainstream policy making, something which appeared to differ in Scotland and England, and of how these consultative fora have been undermined by cuts to their functioning budgets decided by the current government.

Annex: Programme of the Meeting

Combating Poverty in Europe National Stakeholder Meeting, UK

Edinburgh, 18th January, Room 1.10, 24 Buccleuch Place

10.00

Welcome and Coffee

10.15-10.30

Introduction and Aims of the Meeting (Daniel Clegg)

10.30-11.00 **A Brief Overview of the 'COPE' Project** (Alexander Goerne)

11.00-11.45 **The adaptation of national systems of minimum income provision for working-age people in Europe: A framework for comparative analysis** (Daniel Clegg)

11.45-12.30 Responses and Discussion

12.30-2.15 *Lunch*

2.15-3.15 **Open thematic discussion (1):** (Moderated by Alexander Goerne)

The evolving system of benefits and services for poor people of working age in the UK

- ❖ The changes in the welfare reform bill: are they a forward or backward step for working-age benefit support?
- ❖ What steps are being taken or are still needed to ensure high quality employment services are more available for all those who need them?
- ❖ What is being done or could be done to ensure benefit claimants are better able to identify and access support from relevant social services?

3.15-3.30 *Coffee*

3.30-4.30 **Open thematic discussion (2):** (Moderated by Daniel Clegg)

The governance of anti-poverty policy in the UK

- ❖ How can anti-poverty policy be better informed by research evidence and the views of stakeholders, including people who have experienced poverty?
- ❖ What structures and processes exist to ensure that anti-poverty policy is effectively joined up across central government departments and between UK government and devolved administrations, and how can they be strengthened?
- ❖ Are policy coordination mechanisms substantially different in England and Scotland?
- ❖ Are European Union processes and instruments influencing policy and provision for people in poverty in the UK?
- ❖ Are we harnessing the expertise of voluntary and private service-providers effectively enough in anti-poverty policies?

4.30-5.00 Wrap Up

Report from the meeting of National Stakeholder Committee (Italy)

Deliverable 8.x

Matteo Jessoula

2012-10-31

Report from the meeting of National Stakeholder Committee (Italy)

Date: 2012-09-24/25

Place: University of Milan, Department of Social and Political Sciences

Participants from the National Stakeholder Committee:

Andrea Borghesi NIdiL-CGIL (*Nuove Identità di Lavoro-Confederazione Generale Italiana del Lavoro*), Trade Union.

Lidia Borzì ACLI (*Associazioni Italiane Lavoratori Cristiani*), Italian Associations of Christian Workers.

Pietro Cerrito CISL (*Confederazione Italiana Sindacati dei Lavoratori*), Trade Union.

Alessandro Colombo EUPOLIS (*Istituto superiore per la ricerca, la statistica e la formazione di Regione Lombardia*), Regional Institute for Research, Statistics and Training – Lombardy Region.

Olga Fazzini EUPOLIS (*Istituto superiore per la ricerca, la statistica e la formazione di Regione Lombardia*), Regional Institute for Research, Statistics and Training – Lombardy Region.

Nicoletta Teodosi Cilap-EAPN Italy

COPE Team:

Matteo Jessoula

Ilaria Madama

Marcello Natili

Simona Suardi

Summary of the meeting:

After a brief presentation of the COPE research project by the Milano team co-director Matteo Jessoula, the meeting was structured in three main sessions. The first session on Monday afternoon (see the program attached, in Italian) included two sub-sessions: 1a) Presentation of the draft WP5 report on the National Arena of Combating Poverty and Social Exclusion and discussion; 1b) Presentation of regional anti-poverty schemes in Italy and discussion. The second session, on Tuesday morning, included the presentation on the European arenas for combating poverty and social exclusion as well as research planned in the WP4. Finally, session 3 was dedicated to stakeholders' comments and suggestions on the research project.

In the first session, following Ilaria Madama's illustration of the national policy framework to combat poverty and social exclusion in Italy, the discussion with the stakeholders focused on the following issues:

- with regard to the relevant groups for COPE (lone mothers, long term unemployed, working poor): Andrea Borghesi (CGIL) pointed at the fact that we should clearly define both working poor (e.g. should we adopt the standard definition? or we want to have a broader scope, including low paid workers?) and the long-term unemployed.

- with regard to the policy sectors to be included in the analysis: a broad consensus emerged on the inclusion of tax policies in research at the national level. Actually, tax credits do not exist in Italy, but a "no tax area" is a relevant instrument for the active inclusion of low income workers and, according to the stakeholders, this should also be addressed in the Italian case. Moreover, Nicoletta Teodosi (EPAN) suggested to keep tax benefits for health treatments and education in the analysis because they play an important role in tackling social exclusion. Also, there was a shared understanding that reconciliation policies – comprising both paid leaves and services - are crucial active inclusion tools in the fight against poverty. This is particularly important in those countries, like Italy and Poland, where female employment rates are very low and, consequently, an important part of the national anti-poverty strategy relies on the inclusion of women in the labour market.

The discussion also touched upon the criteria for selecting the relevant policy areas and two different strategies were envisaged: 1) the *ex ante* choice of the policy fields/programmes to be analysed (in line with the template for national reports provided by the Edinburgh team); 2) leaving the selection of the policy fields to the national teams.

Especially after the presentation, by Marcello Natili, of the recent attempts to introduce regional minimum income schemes, a number of suggestions regarded the framing of the analysis in the Italian case and a broad consensus emerged on the need to combine research at the national level with the analysis of policy developments at the regional level due to the crucial role of regions in the social assistance sector in Italy. The stakeholders were very interested in the in-depth account of recent regional experiences with particular reference to the case of Basilicata and Campania. Olga Fazzini (EUPOLIS) then briefly presented the Lombardy approach to active inclusion and the fight against poverty, which might well be included in the analysis as a contrast case strongly characterized by the subsidiarity principle, public-private partnership and a basket of different policy measures.

The second session on Tuesday morning was centred on the presentation of WP4 and the planned research on the European areas for combating poverty and social exclusion coordinated by the Milano team. The national stakeholders showed much interest in research under in WP4 and they also said they would appreciate to be informed on future developments.

Similarly, in the third session the stakeholders expressed a strong interest to know more about minimum income arrangements in the various countries included in COPE. Pietro Cerrito (CISL) especially argued that it is important to be aware of foreign experience as he believes the issue will be back on the policy agenda soon in Italy.

Accordingly, the meeting, which was characterized by a positive and collaborative approach by all partners, concluded with the commitment by the Milano team and the national stakeholders to continued communication in the next months/years. Particularly, the Milano team committed to meet the national stakeholders before the conclusion of the COPE project in order to report on the findings of the empirical research for Italy as well as for the other countries included in the analysis.

For the Milano team, the meeting was extremely fruitful for a better framing of the analysis especially with respect to research planned in WP4 and WP5.

Attachment:

- Programme of the Meeting (in Italian)
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**Workshop con National Stakeholders
Milano, 24-25 Settembre 2012**

Programma

Il workshop si articola in due mezze giornate di lavoro e ha una doppia finalità. Da un lato, far conoscere l'attività di ricerca svolta nel progetto COPE all'interno di un network misto caratterizzato dalla presenza di attori sociali rilevanti a livello nazionale, un'istituzione regionale di analisi, monitoraggio e formazione nonché un'unità di ricerca accademica. Il secondo obiettivo è di mettere a frutto le potenzialità di tale network al fine di orientare in modo efficace la ricerca sulle strategie integrate e partecipative di lotta alla povertà in un'arena multilivello.

L'ambizione è pertanto che il workshop sia interattivo: a tal fine, sia le presentazioni dell'unità del Dipartimento di Scienze Sociali e Politiche sia quelle dei national stakeholder saranno seguite da discussione e confronto sui punti salienti.

Lunedì, 24 Settembre

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|-------|---|------------------------|
| 15.30 | Benvenuto e presentazione del progetto di ricerca | <i>Matteo Jessoula</i> |
| 15.50 | Il progetto: temi e domande di ricerca, organizzazione | <i>Matteo Jessoula</i> |
| 16.15 | L'arena nazionale: il caso italiano
(30 minuti / 30 discussione) | <i>Ilaria Madama</i> |
| 17.15 | <i>Coffee break</i> | |
| 17.30 | Le arene subnazionali: schemi regionali di reddito minimo
(30 minuti / 30 discussione) | <i>Marcello Natili</i> |
| 18.30 | <i>Fine dei lavori</i> | |
| 20.30 | <i>Cena offerta da COPE</i> | |

Martedì, 25 Settembre

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| 9.30 | L'arena Europea di lotta alla povertà
(30 minuti / 30 discussione) | <i>Matteo Jessoula</i> |
| Interventi dei national stakeholders (20 minuti, 10 discussione) | | |
| 10.30 | European Anti Poverty Network ITALIA | |
| 11.00 | Nidil CGIL | |
| 11.30 | <i>Coffee break</i> | |
| 11.45 | ACLI | |
| 12.15 | CISL | |
| 12.45 | EUPOLIS Lombardia | |
| 13.15 | <i>Fine dei lavori</i> | |

Report from the meeting of National Stakeholders' Committee (Poland)

Date: 2012-10-23

Place: University of Warsaw, Krakowskie przedmieście 26/28

Participants from NSC:

Marzena Breza, Ministry of Labour and Social Policy, Department of Elderly People, earlier Department of Analyses and Diagnoses

Kamila Płowiec, director for international cooperation of WRZOS - Working community of Associations of Social Organizations (*Wspólnota Robotnicza Związków Organizacji Socjalnych*), secretary of the Executive Council of EAPN (Polish Committee)

Prof. Ryszard Szarfenberg, Chair of the Executive Council of EAPN (Polish Committee)

Krzysztof Wejzman, Centre for support of social initiatives BORIS (*Biuro Obsługi Inicjatyw Społecznych BORIS*)

Jakub Wygnański, vicepresident of The Unit for Social Innovation and Research – “the Shipyard” (*Pracownia Badań i Innowacji Społecznych Stocznia*)

COPE Team:

Prof. Wiesława Kozek, Julia Kubisa PhD, Marianna Zieleńska

Summary of the meeting:

The meeting was divided into three parts: 1) Presentation of the project and discussing the role of stakeholders; 2) Presentation and discussion of the Draft WP5 report on the National Arena of Combating Poverty; 3) Discussion of criteria for selection of the local area for WP6 and possible locations.

1) The role of stakeholders in the project

It was emphasized that COPE team should pay attention to inclusion of stakeholders at every stage of the project implementation to avoid instrumentalisation of NSC as well as LSC and their reduction to commenting conclusion from the research and giving recommendation. It is especially important at the local level, where people are really “experiencing” the functioning of the system of minimum income protection and are actual experts in this field. It was also proposed to invite representatives of primary stakeholders, i.e. people experiencing poverty and exclusion in their lives to the next NCS meeting.

The project should aim at improving the functioning of the system of minimum income – especially in the aspect of its connection to active inclusion. Therefore, we should make an effort to engage key policymakers into it – at least by informing about conclusions and recommendations. The fact that it is an international project implemented in Poland by a renowned university may be helpful in making the results relevant to the politicians.

2) Discussion over the WP5 report

NSC members expressed the willingness to read and comment the draft of WP5 report – it will be distributed to them this week.

The main theses of the report were presented to the NSC. The comments were extensive. Part of them were connected to the members' own interests: there were proposals to cover also another groups – apart from single parents, long-term unemployed and working poor – e.g. elderly people or disabled people.

Questions were raised about the definition of minimum income system and active inclusion. As for the former the controversy arose which transfer payments should be included – only allowances from social services or every means-tested allowances (also family or housing benefits). As far as the latter is concerned it was emphasized that we should keep in mind that active inclusion is not only about labour market, but many other areas – education, health care, culture.

The functioning of social services was widely discussed, raising issues such as discretionary practices, inadequate preparation of social workers to perform their tasks, overregulation. Allowances – especially guaranteed minimum income (GMI) – were debated in the context of social rights. A consensus was reached, that it is doubtful that GMI is considered by social services as a social right, since the process of its granting is still not transparent.

Finally, the model of Polish social state evoke some controversies. They were connected to the fact that the system of social services operates according to different rules than the social protection system in general.

3) Selection of local area for case study

Also selection criteria of the local area to conduct our WP6 and WP7 case study was shortly discussed. To lines of selection were suggested – looking into more detailed data about territorial units and looking for a good point of entry to a particular community (e.g. non-governmental organization).

Minutes from COPE stakeholder meeting, 29th of October, 2012

List of participants:

Ivar Scotte	National Council of Organizations
Sonja Wallbom	European Anti-Poverty Network
Pia Redlund	Social Mission
Jenny Nybom	The National Board of Health and Welfare
Elisabet Aldenberg	Ministry of Health and Social Affairs
Pia Fagerström	Ministry of Health and Social Affairs
Agneta Åhlund	Save the Children
Roger Mörtvik	The Swedish Confederation for Professional Employees
Anna-Kirsti Löfgren	The Swedish Trade Union Confederation
Vivi Jacobson-Libietis	The Swedish Association of Local Authorities and Regions

During the meeting, the following items were raised in the discussion:

- A. *Re-organization of the welfare state.* The importance to consider changes such as reform of the social insurance and unemployment benefit systems, together with an extended role for third sector organizations in service delivery. Municipalities have also taken on a more extensive role in providing activation measures.
- B. The political agenda should *focus more on child poverty*. Also COPE should put more emphasis on child poverty. Children are vulnerable to certain types of deprivation; in which way does child poverty differ from poverty in general and how do children experience poverty differently to adults?
- C. *Effect implementation by targeting the discrepancy between rhetoric and practice.* According to several participants at the meeting, there are few concrete implementations

of EU goals and policies on the local arena. The vocabulary used by EU has though affected the national guidelines and rhetoric's of active inclusion but not necessarily the local implementation.

- D. *The dual role of EU's agenda on poverty.* The European Social Fund has been perceived as central in funding and provision but despite this aspect, municipalities have often continued with "business as usual". Third sector organizations perceived that their influence and legitimacy increased due to the Lisbon agreement. Third sector organizations can now demand service user involvement and opportunities to affect decision making based on rights stipulated in the Lisbon agreement.
- E. *Multi-dimensional approach.* The participants at the meeting highlighted the need for more integrated practices through increased co-operation between institutions like schools, PES and psychiatry.
- F. *Methodological issues.* Discussion on definitions of selection criteria in relation to lone mothers. The selection criteria can be tricky when it comes to Swedish circumstances. Children of Swedish separated parents often live in alternating residence arrangements; the child lives one week at a time with each parent. This is a result of an agreement between parents, an agreement which has become popular the last decades in Sweden.
- G. *Risk of social policies limitation.* Social trust and social cohesion were discussed as central perspectives suggested to be integrated in COPE analyses. Several participants think that people perceive themselves to be less and less a part of the community. Especially poor persons no longer trust the welfare states capacity and willingness to support people in need. Public policies which aim to remedy this situation through universal policies in Sweden, lack the ability to be established because there is a genuine lack of trust particularly among people in need.

/Alexandru Panican, Anna Angelin, Max Koch & Håkan Johansson (Lund University, Sweden).