



PEER REVIEW
IN SOCIAL PROTECTION
AND SOCIAL INCLUSION
2010

THE PROGRAMME FOR
DEVELOPING LOCAL PLANS
FOR SOCIAL INCLUSION IN
CATALONIA

BARCELONA, 7-8.10.2010

SYNTHESIS REPORT



On behalf of the
European Commission
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FOR SOCIAL INCLUSION IN
CATALONIA

JAN VRANKEN, CENTRE OASES – INEQUALITIES, POVERTY, SOCIAL
EXCLUSION AND THE CITY, ANTWERP UNIVERSITY
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Summary

The Peer Review held in Barcelona, Spain on October 7–8, 2010 discussed 'The Programme for Developing Local Plans for Social Inclusion in Catalonia'. It was hosted by the Spanish Ministry of Health and Social Policy, and the Catalan Institute of Assistance and Social Services (ICASS).

Joining the host country to assess the programme and provide information about their own systems were government representatives and experts from seven peer countries: Bulgaria, the Czech Republic, Latvia, the Netherlands, Norway, Romania and Serbia. The European Anti-Poverty Network (EAPN) and a European Commission representative from the Directorate-General for Employment, Social Affairs and Equal Opportunities were also present. Jan Vranken from the University of Antwerp (Centre OASeS) acted as thematic expert.

In 2006, the Department of Social Action and Citizenship of the Generalitat de Catalunya introduced a Programme for Developing Local Plans for Social Inclusion building on previous efforts. The Plan for Social Inclusion and Cohesion in Catalonia (2006–2009) was developed within this framework. The plan establishes strategic and operational objectives including how to boost resources.

The Programme for Developing Local Plans for Social Inclusion is an inter-administrative programme intended to realise local plans. It develops the governing principles for action in the area of social inclusion as established in the plan and is co-ordinated by the Catalan Institute of Social Assistance and Services (ICASS).

Through ICASS, the Department of Social Action and Citizenship provides a package of resources to local authorities to facilitate the strategic co-ordination of local actions for social inclusion by i) devising Local Plans for Social Inclusion (PLIS) and ii) taking the necessary initiatives for their effective development. The PLIS are implemented through the local administration in co-ordination with other local actors; they are a mixture of existing projects and new initiatives but the innovative aspect is that they are integrated into a common framework.



By the end of 2009 thirty-two local authorities had developed plans and nine more are expected in 2010; the aim is to extend them to all 103 local authorities in Catalonia. As such, government commitment is necessary to ensure the plan's conceptual development, technical leadership and a grant to guarantee their continuity. The plan has to include changes in understanding the phenomenon of exclusion and developing new forms of governance (co-ordination between public and social organisations and clear participation strategies).



A. Policy context at the European level

At least two intricately connected themes are relevant in the context of the Catalonian PLIS vis-à-vis policy context at the EU level; many urban development programmes already focused on the spatial/territorial aspects of deprivation, but now there is focus on social factors. This development has been driven by research both on the spatial dimension of social problems (concentration of poverty and social exclusion in specific neighbourhoods), and on the social impact of spatial characteristics. The latter concerns topics such as limited opportunities connected to place of residence; best known is how the stigmatisation of one's place of residence (such as the French *banlieues*) limits educational and employment opportunities, especially for young persons. These dimensions remain strictly compartmentalised at the EU level in the DG Employment, Social Affairs and Equal Opportunities and the DG Regional Policy.

The local level

The context in which local plans and programmes — on urban development, on employment, on social inclusion — have gained prominence in policy-making is characterised by a combination of recent developments and long-term trends. Those trends include structural and political factors, especially the fiscal crisis of the (central) state, the effects of globalisation, the growing importance of the principle of subsidiarity at the EU-level, and the opinion that more effective solutions to complex problems can come from local-level policies. In addition, the recent economic crisis and its repercussions (such as increasing unemployment and poverty) have accentuated the existing need to solve social exclusion with local programmes.

The fiscal crisis of the state has reduced the central state's means, particularly with regards to social policy. Responsibilities, but seldom budgets, have been transferred to the local level and the 'welfare society' (private welfare organisations). This was especially so for initiatives targeting the hard-to-reach, for cultural and/or legal reasons. Secondly, globalisation has caused a shift of power from the nation state to the higher



level of supranational conglomerates and to the ‘lower’ level of (global) cities and regions. The increased importance of the principle of subsidiarity in EU legislation and procedures has provided an ideological framework for this phenomenon. Finally, the local level is viewed as appropriate to tackle complex problems; approaches inspired by the governance model are often easier to develop successfully at the local level. A decentralised approach caters for considerable differences among regions. Preferred governance mechanisms involve shared power and a division of labour in the policy-making process, through stronger interaction among governments and civil society as well as through the participation of other relevant stakeholders (sometimes including for-profit organisations).

Urban development programmes (UDPs) have a lot in common with the Catalonia’s PLIS, they have a set of projects at the local level (city or neighbourhood) which are implemented following a timetable and partnerships with community involvement are central. Despite their focus on physical measures — rebuilding or renovating parts of the housing stock and improving public space, or on social and economic targets, such as decreasing unemployment — they usually take an ‘integrated approach’ with physical, social, economic and cultural initiatives¹. The first generation of programmes set up at the national or regional level has been followed by explicitly local initiatives; these include the Dublin City Development Plan (2011–2017), “Liverpool 2024”, the “Masterplan for the Rehabilitation of Downtown Porto”, and the “Aire métropolitaine lyonnaise”. The zonal plans for Friuli, Venezia and Giulia (Italy), the Local Social Networks — Famalicao (Portugal) and the Vall d’en Bas Cooperative (Spain) are innovative initiatives in local development and social protection (Estivill, 2008).

1 A brief selection: England’s New Deal for Communities (NDC) Programme, which took off in 1998 for an intended period of ten years; the Dutch *Grotestedenbeleid* (Big cities’ Policy, 1994–2009); the French *Politique de la Ville* and *Contrat de Ville* (City Policy & City contract, running since the 1970s); the German *Soziale Stadt* (Social City, since 1999 but now under threat); the Danish *Kvarterløft* (Neighbourhood Lift, 1997–2007); in Belgium, the federal *Grootstedenbeleid* (Big Cities’ Policy, 2000–) and the Flemish *Stedenfonds* (City Fund, 2003–); the Italian *Contratti di quartiere I & II* (Neighbourhood Contracts, 1997 and 2002) and *Programmi di recupero urbano e di sviluppo sostenibile* (Urban Regeneration and Sustainable Development Programmes, 1998); the Portuguese *Critical Neighbourhoods Initiative* is of a more recent date (2006).



At the EU-level, the URBAN and LEADER Community Initiatives addressed urban and rural development respectively through capacity building and empowering local actors. Local partnerships were involved in defining strategies and priorities, resource allocation, programme implementation and monitoring. Although the Local Employment Development (LED) strategies promote employment, their approach is also holistic and integrative (Mandl, 2009). LEDs are expected to mobilise multiple stakeholders and local partnerships which can identify with the localities they operate in.

The cohesion policy regulations for 2007–2013 emphasise the importance of involvement from local and regional authorities throughout the programmes. For example, national and regional authorities can devolve programme management, or parts of it, to local authorities, and private organisations should be involved as partners.

In May 2007, the Leipzig Charter, or the ‘Leipzig Charter on Sustainable European Cities’, was signed; it emphasises both the importance of integrated urban development policy approaches — cities should be compact in urban form, complex in functions, and socially cohesive — and the need for interventions, particularly in deprived neighbourhoods. The charter is the reference document in European urban development coordination. The importance of concrete action to implement the Leipzig Charter was emphasised during France’s Presidency of the EU. Following the Marseilles Statement of November 25, 2008 the European Ministers responsible for Urban Development commissioned France and the French Ministry of Ecology, Energy and Sustainable Development to form a European working group to develop a ‘Reference Framework for European Sustainable Cities’²; this should be done together with the cities.

2 www.rfsustainablecities.eu/ Also: Sustainable Cities Reference Framework. Project Overview. 07. 10. 2009 (distributed at the UDG meeting in Stockholm 21 October 2009).



The Barca Report from 2009, 'An agenda for a reformed cohesion policy'³, emphasised that 'a place-based strategy is the only policy model compatible with the EU's limited democratic legitimacy'. Territorial units should, wherever possible, include functionally interdependent urban and rural areas. In such functional urban areas the larger cities will play a prominent role as centres of innovation, creativity and the economic development of the area. They will, however, also have neighbourhoods that are characterised by deprivation. Therefore, place-based development strategies should include in its objectives reducing persistent underutilisation of potential and persistent social exclusion.

Most recently the Toledo Declaration of June 2010, which was made during the Spanish Presidency (in Trio with Belgium and Hungary), highlighted the importance of integrated urban development and the urban dimension of cohesion policy. After 2014 there will be more focus on cities as key drivers for the delivery of EU2020, more responsibilities entrusted to cities for programme delivery, and cohesion policy will be used to support programmes for experimental solutions.

Social inclusion

This section will look into the various ways poverty has been framed and what policies have been employed to tackle it.

Towards the end of the last century, 'social exclusion' gradually replaced 'poverty' as a concept in the EU debate. Several reasons have been identified, the main one is that some Member States did not like being reminded of the existence of 'old fashioned' poverty within their borders; social exclusion was meant to encompass a wider range of situations and to refer to the whole population and, above all, it had less denigrating connotations. In the host

3 http://ec.europa.eu/regional_policy/policy/future/barca_en.htm. The four main conclusions of the report are: there is a strong case for allocating a large share of the EU budget to a 'place-based development strategy'; cohesion policy provides the appropriate basis for this strategy, but a comprehensive reform is needed; the reforms requires a renewed policy concept, a concentration of priorities, and a change of governance; three conditions for change to happen are: a new high-level political compromise is needed soon, some changes can/should start in this programme period, and the negotiation process must be adjusted.



country report reference is made to the ideas of Beck on the democratisation of risks and of Bauman about the birth of a liquid society in which insecurity is a common factor.

Later, social exclusion was replaced by social inclusion, which was considered to embody a positive approach — an approach concerned with solutions, not problems. Conceptual confusion has further increased by the recent use of ‘social cohesion’ as a synonym for social inclusion. The concept of ‘inclusion’ was further strengthened by the introduction of ‘active inclusion’ in the Recommendation 2008/867/EC of 3 October 2008 on the active inclusion of people excluded from the labour market — confirmed by the European Parliament resolution of 6 May 2009. Linking this active inclusion approach more structurally to the urban and regional dimension of the Structural and Cohesion Funds could improve the framework even further and facilitate the successful realisation of initiatives such as the Local Plans for Social Inclusion.

At the core of EU inclusion policy is the (social) ‘Open Method of Coordination’, which follows a ‘soft approach’ to intergovernmental policy coordination; policy decisions are taken at the national level, cooperation is voluntary, and the European Commission’s function is limited but crucial since coordinating social policies at the EU level is an effective way to tackle common challenges facing Member States.

The OMC is organised in cycles to encourage cooperation between Member States, with regular reporting to the European Commission. Its key elements are common objectives, National Strategy Reports on Social Protection and Social Inclusion (previously National Action Plans Social Inclusion or NAPincl⁴) — which are assessed by the European Commission and the Council of Ministers in a Joint Report, Peer Reviews — in which representatives of relevant national ministries, assisted by some independent experts and Commission members, critically assess a selected

4 The first National Action Plan of Social inclusion of the Spanish Kingdom (*Plan Nacional de Acción para la Inclusión Social del Reino de España*) from 2001 has been succeeded by five more national plans, the most recent one for the period 2008–2010.



'best practice' programme or strategy in tackling specific problems, and a set of common indicators (originally the 'Laeken-indicators')⁵.

Although it was originally developed to promote cooperation at the national level, elements from the OMC are being used at infra-national levels, such as in Catalonia. The possibility of using some form of OMC at the city level, within the framework of the Leipzig Charter, is under discussion. In 2003, the European Commission had already emphasised the importance of the local level in the development of inclusion policies, and in March 2006 the local area was identified as the best level for combating exclusion; the question is whether Structural and Cohesion Funds can actually be better linked to strategies such as Catalonia's PLIS, and what steps should be taken at the European level to achieve this. At the local level, there will be attempts to promote mutual learning. Peer Reviews at the local level were tried last year and a network of local authorities to promote studies and data collection was created.

EU 2020

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The Europe 2020 strategy replaces the Lisbon Agenda adopted in 2000 which for the most part failed in its aim to turn the EU into 'the world's most dynamic knowledge-based economy by 2010'. Europe 2020 is about smart growth (fostering knowledge, innovation, education and digital society), sustainable growth (making production more efficient while boosting competitiveness) and inclusive growth. The official text⁶ states inclusive growth means 'empowering people through high levels of employment, investing in skills, fighting poverty and modernising labour markets, training and social protection systems so as to help people anticipate and manage change, and build a cohesive society'. This social dimension is firmly linked to a spatial dimension, stating it is 'essential that the benefits of economic growth spread to all parts of the Union, including its outermost regions, thus strengthening territorial cohesion'. It further states the importance of the

5 The process-analysis of the Social OMC 2008–2010 shows the detailed structure of the three-years project cycle and the tasks the different actors have at each stage.

6 European Commission (2010), *Europe 2020. A strategy for smart, sustainable and inclusive growth*. Brussels, March 3, 2010 COM(2010) 2020.



'lifecycle' (a concept that features in the Catalan initiative) and stresses that 'Europe needs to make full use of its labour potential to face the challenges of an ageing population and rising and global competition' that 'policies to promote gender equality will be needed to increase labour force participation thus adding to growth and social cohesion'.

The strategy has been criticised for being too broad for targeted action⁷. It is questionable whether the seven Flagship initiatives selected 'to catalyse progress under each priority theme' will lead to action. The initiative that is directly linked with the theme of this Peer Review is the seventh Flagship on a European Platform Against Poverty, which intends to 'ensure social and territorial cohesion such that the benefits of growth and jobs are widely shared and people experiencing poverty and social exclusion are enabled to live in dignity and take an active part in society'. The first Flagship, on Innovation Union, could also become an important Flagship for the development of local plans, provided the initiatives to define it in terms of social innovation are successful.

A number of regional players have complained that the role of regions is not visible enough in the 2020 strategy (EurActiv 23/06/10), with some arguing that it is too similar to the Lisbon Strategy (EurActiv 14/10/10). They argue that if local leaders are given the freedom and take the responsibility to create tailor-made solutions for making the 'Europe 2020' growth strategy work, it will be more successful than its predecessor. This would most likely be achieved by using stricter earmarking methodologies to allow for more flexible solutions for different cities and regions. However, making this strategy work implies reciprocity; local policymakers should be more aware of their position and pay attention to the EU 2020 goals that fit their local priorities. This implies that regions become an important executive partner. EU Regional Policy Commissioner Johannes Hahn has proposed, in his speech to the Informal Council of Ministers for Regional Policy (Zaragoza,

⁷ Prof. Daniel Tarschys at the ESF Conference on Shaping the Future, June 23, 2010



19th February 2010), to give countries and regions more flexibility to define the precise policy mix they need to reach those priorities⁸.

Let us conclude that increasingly there is recognition that the numerous conflicting challenges should not be addressed individually. Integrated strategies are needed which include a common long-term perspective and aim for improvements in some aspects without causing more problems in others. Last but not least, the local level is the most appropriate level to realise those goals.

European (and potentially international) comparative aspects

There are many active local development plans within EU's borders and there are also initiatives — in the form of a programme or a centre — set up to aid local plans. Not all these local plans are concerned with social inclusion (or combating social exclusion and poverty); many initiatives focus on combating unemployment (or worklessness) or on improving the physical characteristics of an area; one of these is the City Strategy in the UK, which has been the subject of a Peer Review. Ireland also presents a case of good practice (perhaps even best practice), in late 2000s, the Combat Poverty Agency (CPA) had already established the Local Government Anti-Poverty Learning Network to support the implementation of NAPs at local level. The overall aim of the Network was to promote and support the development of a strong anti-poverty focus within a reformed system of local government. The objectives of the Network were to provide a forum in which local authorities can share experience and consider how to make the maximum contribution to policies tackling poverty and social inclusion, to support and assist local authorities to incorporate a strong anti-poverty focus within their work, to enable local authorities to share information about developing new and innovative projects and initiatives, and to exchange different local

8 'I am ready to explore with you a system which provides more flexibility to countries and regions to define the precise policy mix to reach those priorities, as suggested by experts in the High Level Group. We may for example re-think the current earmarking system and rather concentrate on the preparation of strategies which are coherent with Europe 2020 objectives and targets. These targets could then be translated into programmes and used as the basis for assessing progress and discussion in a high level political debate.' See: <http://europa.eu/rapid/pressReleasesAction.do?reference=SPEECH/10/34&format=HTML&aged=1&language=EN&guiLanguage=en>



experiences and best practices. Based on their experiences, a handbook was published (Walsh, 2005)⁹ and it remains a very useful guide.

An interesting initiative working at the EU-level is the EUROCITIES Network of Local Authority Observatories on Active Inclusion (EUROCITIES-NLAO)¹⁰. It has three main objectives: informing, disseminating and awareness raising; research and policy analysis; implementing and promoting mutual learning. The main ambition of EUROCITIES-NLAO is to inspire future policy developments on Active Inclusion at the EU, national and city levels, so it investigates local strategies to promote the active inclusion of people furthest from the labour market, it monitors and analyses the situation in a broad range of relevant social services. In addition, the practices of the local administrations social service provision in, originally, Bologna, Prague, Rotterdam, Southampton and Stockholm¹¹ were scrutinized for ideas on how to tackle urban challenges for the inclusion of vulnerable people.

9 Walsh, K. (2005), To build a fair and inclusive society. Social Inclusion Units in Local Authorities. Dublin, Combat Poverty Agency.

10 For more information, see <http://www.eurocities-nlao.eu/>

11 At present, Copenhagen, Birmingham, Lille-Roubaix, Barcelona, Cracow, Brno and Sofia have joined.



B. Local Plans for Social Inclusion in Catalonia

The EU's Lisbon Strategy (2000) established the need to fight social exclusion and to stimulate social inclusion and cohesion. As a result, in 2001 the Spanish government began developing its National Action Plan for Social Inclusion. In February 2006, the Generalitat of Catalonia (Catalan Regional Government) proposed its own Social Inclusion Plan, and encouraged Catalan municipalities to draw up their own PLIS. Forty-one municipalities are currently involved, but the aim is to extend this to all 103 municipalities eventually. More recently the Europe 2020 Strategy, which stresses the need for inclusive growth, has influenced plans.

Plans for Social Inclusion

A municipality's local plan follows a 6-year cycle, and is essentially inter-administrative, i.e. it adopts cross-cutting policies to encourage social inclusion by coordinating the services offered by the public authorities such as: employment, housing, social protection, family support, etc. The plan is steered by local committees with an essential element being 'third sector' (i.e. civil society) participation. Catalonia's tradition of citizen participation has ensured this was a particularly successful aspect of the plans.

The Programme for Development of Local Plans is overseen by ICASS, which offers technical support, encourages networking to share best practices, and created the e-Catalonia Platform to boost an online exchange of information among participating municipalities. Participating local authorities receive a package of resources to support their plans. In each area, a local Technical Office with two staff has been set up to assess the local situation, establish a network of partners, and manage pilot projects promoting social inclusion.

The guiding principles of the Programme are complex; they are 'community perspective, promotion of personal autonomy, multidimensional approach, strategic view, focus on causes, multilevel and cross-cutting perspective, stimulation of participation, and recognition of the territorial specificity'. The general goal of the Programme for Development of Local Plans is 'to stimulate measures for social inclusion through a model of intervention in



Table 1: Financial data of the Programme for Development of Local Plans for Social Inclusion

	NEW PLIS	Total PLIS	Medium Value (€)	Annual Amount (€)
2006	12	12	65,563	786,762
2007	8	20	91,597	1,831,937
2008	2	22	108,439	2,385,649
2009	10	32	77,888	2,492,431
2010	9	41	72,903	2,989,046

collaboration with all the agents of the territory, especially the local civil service’.

Local plans aim for the realisation and coordination of initiatives, creating measures and actions of social intervention that determine factors of social exclusion and vulnerability and act to solve them. The approach integrates mainstreaming and develops a network of all relevant actors in the area. The prevention of risks of social exclusion is central, but special attention is paid to population groups that are already in a vulnerable situation. From the general goals strategic and operational goals are formulated.

The Programme has two target areas, spatial units (local plans, of which the ‘geographic scope’ is the regional and the local level) and social inclusion (persons and groups in need of inclusion). The local plans aim to be inclusive, not restrictive; initiatives for those already in a situation of vulnerability are combined with strategic and preventive actions, which explains why in an identification form, ‘population in general’ is checked under the heading ‘targeted beneficiaries’ — although this form also mentions specific risk groups such as children, single-parent families, the homeless, persons suffering from specific illnesses or drug addictions as other options.

Most notably Spain’s report illustrates that the perspective on social exclusion has expanded from an economic assessment to a broader approach. The report cites the declining welfare state, changes in family composition, and the transition from an industrial society to a knowledge society as factors, which have increased feelings of insecurity and have increased the risk of social exclusion. Closely linked to these developments is the increasing unpredictability of peoples’ lifecycle; traditional life transitions — education,



entering a job, leaving home, marriage, having children — may now appear in various sequences or more than once during a person's life. As such, new tools are needed to understand and tackle the complex set of factors which give rise to social exclusion.

A critical assessment of the pilot years of the Social Inclusion Plans (2006–2008) was carried out in 2008; it was commissioned by the Catalan administration (the Technical Office for Social Inclusion of the Social Action Department) and carried out by an external body (the Institute of Government and Public Policy — IGOP) with the help of the Autonomous University of Barcelona (Universitat Autònoma de Barcelona)¹². Two limitations with this critical assessment should be noted: it is too general and lacks empirical data, and it was done too long ago to have relevance in an assessment of the present situation. The findings are listed below.

Strengths were as follows:

- The very existence of the Programme;
- The desire to involve local bodies in strategies of inclusion across the Catalan territory and acknowledge them as key operators;
- The degree of substantive and operative autonomy conferred to the municipalities for initiating innovative practices;
- Financial efforts by the Department and budget provisions for projects;
- Desire for rigour in the selection of candidate municipalities;
- Flexibility of the Programme to take on projects with differing degrees of development, rhythms and priorities;
- Support and administrative assistance to local bodies;
- The creation of the new ICASS technical structure;
- The model of economic justification provided by the Programme;
- Positive evaluation of the training seminar;

¹² The Action Plan for Inclusion and Social Cohesion in Catalonia and the Programme to develop the Local Plans for Social Inclusion were also designed in collaboration with this University Centre.



- Development of e-Catalonia;
- Support and empowering of the local technical offices (OTL) and social services.

The programme's weaknesses were:

- The lack of precision on the role of agents, implicit plans and differing guidelines;
- Ignorance of and (in some cases) concern by local technicians concerning the expectations placed on them and their work (OTL);
- Imprecision in the timetable of local projects, financing and the Programme itself;
- Some deficiencies in access to the Programme and in the selection of candidates;
- Discontinuity in formal monitoring, lack of process monitoring and local disenchantment;
- No specification of technical support, lack of provision and displacement of institutional referents;
- Failure to take advantage of and transfer available information;
- A lack of visibility of the Programme and the local plan within the framework of the Generalitat;
- Difficulties in mainstreaming, integration and networking at the local level.

Since this evaluation took place its results have had an impact on the later stage of the Programme and specifically on PLIS in Sant Boi de Llobregat and Lleida.

The plan in Sant Boi de Llobregat — a city in Barcelona's metropolitan area — aims to develop and implement policies that tackle housing, education, health, employment and social welfare needs together. A local Pact for Inclusion signed by over 100 stakeholders, lays out ninety-nine actions to mitigate the effects of the crisis through job creation, access to housing and

social services, and also builds on the city's expertise in mental health care to promote its medical and educational facilities.

In Lleida — a city in Catalonia's agricultural region — the Plan for Inclusion and Social Cohesion, drawn up with the participation of stakeholders, including many service users, set out over 240 projects which focus on supporting children and families, helping older people, positive targeting of the homeless, job creation, improving social service delivery, awareness-raising on inclusion through seminars and exhibitions and providing tools for innovation and employment in social activities. Training sessions also feature in the plan.



C. Policies and experiences in the peer countries

Bulgaria, Czech Republic, Latvia, the Netherlands, Norway, Romania, and Serbia were the peer countries in Catalonia. They¹³ brought forward the following concerns:

- the place of poverty and social inclusion on the political agenda;
- the presence and position of local plans and their relation to EU initiatives;
- the role of the local and regional level and their relation with the central state;
- the role of civil society in general and/or welfare society (defined as the civil society counterpart of the welfare state or third sector) in particular;
- the existence of partnerships and the form they take (provisional or more systematic);
- how to engage target groups.

Overall, there was substantial variation in the Peer Review countries. For example, in a basic measure of economic welfare participating countries range from a GDP (Gross Domestic Product) per head of \$ 84,543 (Norway) to \$ 5,262 (Serbia)¹⁴ and, similarly, in terms of welfare regime they belong to extremes with the social-democratic Nordic regime at one end and regimes at the margin of any welfare state classification at the other (Romania, Bulgaria, Serbia).

To improve the readability of this synthesis, opinions of official representatives and of independent experts, which at times differed, were brought together here; what follows is not a perfect account of their individual views.

¹³ This analysis is based on the information collected from the peer country reports and the presentations during the Peer Review meeting.

¹⁴ Data refer to the year 2010. World Economic Outlook Database–October 2010, International Monetary Fund. Accessed on January 30, 2011



The place of poverty and social inclusion on the political agenda

In some countries, poverty and/or other forms of social exclusion are high on the agenda, but this is not the case in all the countries surveyed. Critical factors are the number of people living in poverty, the presence of (ethnic) minorities (especially if they are perceived as a threat), how poverty is defined (solely in monetary terms or as a multidimensional phenomenon) and the dominant perspective on poverty and social exclusion — which range from 'blaming the victim' to more considered approaches recognising structural problems.

During the development of the National Programme for the European Year for Combating Poverty and Social Exclusion in 2010, **Bulgaria** planned to identify priorities for its strategy to combat poverty and social exclusion in a long-term and medium-term plan starting after 2010. In fact, before that in 2009 Bulgaria established a 'National Council on Social Inclusion Issues', which is chaired by the Minister of Labour and Social policy and the ideas of participation and of better governance of anti-poverty and social inclusion policy were included in the Government programme (2009–2013) as a separate priority axis.

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In the **Czech Republic** poverty is not a political issue, possibly because the official poverty rate is only 8% (although many people who hover just above the line are not included). The current right-wing government uses a definition of poverty which refers to 'accidents' that could affect (almost all) people. Extending the definition of poverty and social exclusion to account for complexities and structural issues would come with the involvement of different agents — which is so far lacking. Relevant national and local stakeholders as well as EU officials are critical of the country's NAPs, especially the persistent lack of political support and inadequate participation. The mainstreaming of social inclusion issues also remains underdeveloped.

The financial crisis effected **Latvia's** economy severely and the resulting austerity measures have been putting increased pressure on those with low and medium incomes. More people are living on the poverty threshold and requests for support from the municipality have increased considerably.



The World Bank now plays an important role in defining the framework of social policy in Latvia; social initiatives rely on assistance from the European Structural Funds. As in many other countries, the fight against poverty has not been a real policy priority; during the years of economic growth faith was put in trickle down relief from poverty whilst too little attention was paid to the quality of employment or to social inclusion measures. Now a Social Inclusion Policy Coordination Committee has been established at the national level.

In the **Netherlands**, 8% of the population was living below the low-income threshold in 2008, but most remarkable is the increase in the number of 'working poor'. The Dutch approach concentrates on the long-term value of tackling deprived neighbourhoods as opposed to households. At the local level, social and welfare services are increasingly area-based and organised around principles promoting personal autonomy, the cooperation of organisations based on shared perspectives and goals, and encouraging participation.

Compared to many European countries **Norway** has enjoyed low levels of unemployment and poverty over the last few decades. Until a decade ago the term poverty was noticeably absent from public debates, and the general consensus was that a strong focus on equalising measures and improving living conditions had helped to abolish the problem. However, poverty came back on the political agenda in 2002, and the increase in child poverty in recent years has caused concern. Although many initiatives target the local level, they remain fragmented; an integrated and sustainable approach to promote social inclusion has yet to be developed (see "Local plans and their relation with EU initiatives" for more details).

Poverty is an important issue in **Romania**, which is not surprising given the official poverty rate was 23% in 2008 (although it was decreasing). Child poverty and unemployment are the clearest culprits, with the highest poverty levels occurring amongst families with many children. As for social inclusion policies, the Romanian report largely contains projects developed

within the framework of a National Action Plan on Social Inclusion and a Social Observatory¹⁵.

In **Serbia**, the pre-crisis period can be characterised as one of poverty reduction but what followed was a deterioration of living standards and increasing poverty. In 2009, the poverty rate was 6.9%, but according to preliminary research it rose by nearly 2% the following year, affecting the uneducated and under-15s in particular; households with male heads also experienced a higher poverty rate as a result of the crisis. The position of particularly vulnerable segments of the population (the Roma, IDPs, social assistance beneficiaries) has been aggravated during the crises by the decreasing availability of jobs in the informal economy, which they rely on heavily, loss of formal employment, reduced chances of finding a new job, and decreased wages both in the formal and informal economy. A problem in Serbia is that all plans rely on donor funding and there is no political commitment to combat poverty and social exclusion.

Local plans and their relation with EU initiatives

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In the framework of the Europe 2020 strategy, **Bulgaria** is developing local plans for combating poverty and social exclusion in its 28 municipalities, which are also regional centres. These plans analyse power relationships, identify who is in poverty, and assess current initiatives.

In the **Czech Republic**, three National Action Plans for Social Inclusion have resulted in a well-developed system of local community planning, but these have so far focused on social service provision and poverty prevention. Several serious attempts to create an overall local plan for social inclusion were facilitated by PROGRESS, however community planning procedure, which happened to be developed at the same time, took priority; social inclusion policy planning took a back seat and follow-up was not supported at the national level. In line with the European Year for combating poverty (2010), the Czech Government launched a National Programme with four main targets for social policy strategy, of which the mobilisation of public

¹⁵ The forward-looking nature of Romania's peer country report explains why it is virtually absent from the remainder of this analysis.



administration for the creation and assessment of regional and local action plans to combat poverty and social exclusion were crucial. Developing the OMC in Czech social policy should also be a priority.

Since joining the EU, **Latvia** has had three National Action Plans, but these are under threat in the present context; since the NAPs play an important role in getting people from different ministries to cooperate, this would be a significant loss. Some municipalities have developed plans on poverty and social exclusion through international projects.

In the **Netherlands**, social inclusion policy has been driven by the neighbourhood approach in which an action plan should be oriented towards a specific area. The policy had the following priorities: a standard that allows authority to check quality and obtain concrete results; residents are central; cooperation between parties within broad coalitions (of business, people, government, and civil society) is required; it is innovative and it is sustainable.

A core feature of the Norwegian welfare model is the connection between the labour market and the welfare system. **Norway's** poverty policy is primarily an activation strategy which combats poverty by encouraging labour market participation. Other elements are improving living conditions, setting up a new administrative structure, and local-level projects financed through the central government. Since the first action plan against poverty, several national grant schemes and initiatives have been launched within different target areas, such as child poverty, social housing, homelessness, youth programmes, and the inclusion of newly arrived immigrants. These tried to initiate local social welfare programmes, and to develop new structures for cooperation at the local level. The central government believes that local communities understand the local challenges best, so local action plans are encouraged. However, most municipalities do not have a comprehensive plan to combat poverty. As local plans are encouraged, they must deal with the fragmentation of nationally funded schemes once they reach the local level, as well as working on sustainability for when national funding dries up.

During the last five years local planning for social inclusion in **Serbia** can be seen in various donor-funded projects — not in official state or local government policies — where it has focused on the development and



implementation of social welfare local plans. At present, 23 municipalities are encouraged to adopt plans using a cross-sector approach, with NGOs and vulnerable groups involved in the process. This is the first time that different sectors have talked to each other at the local level, but various problems including limited capacity, mean that few donors want to get involved. A Law on Social Protection, which is expected to be enacted in late 2010, will reinforce the development of social welfare programs at the local level, and introduce the concept of earmarked transfers in the area of financing social welfare services, based on certain criteria — one of them being that the local government must have a local social welfare plan with prioritised services. Thus, indirectly, local social welfare planning is becoming institutionalised in Serbia.

The role of the local and regional level and their relation with the central state

The given role of these authorities very much depends on the degree of autonomy of the local level, which is complicated if there are intermediary authorities between the central state and the local level, as in Spain, Belgium or Germany, where regions possess a fairly high degree of autonomy.

In **Bulgaria**, the Ministry of Labour and Social Policy is responsible for governing social inclusion policies, which are carried out in the framework established by the Social Inclusion Directorate for the National Programme for the European Year for Combating Poverty and Social Exclusion. Local plans aim to strengthen the capacity of the local authorities to prepare and implement integrated initiatives targeted at overcoming the problems facing people living in poverty and social exclusion.

Municipalities do not enjoy a high degree of autonomy in the **Czech Republic**, and there are barriers at the regional level too.

Following an administrative reform, the number of municipalities in **Latvia** has been dramatically reduced (to 118), which may serve to increase their importance especially given the fact that the number of administrative levels was also reduced from three (national, district and local) to two



(national and local). At the national level, social inclusion policies outline the main activity trends; while the real actions addressing poverty and social exclusion take place locally (these have the status of pilot projects). In terms of territory and population, Latvia is a small country, however substantial regional differences do exist and regions are classified based on the level of unemployment and the at-risk-of-poverty rate. In order to respect and take account of these differences, the development of local NAPincl seems most suited to the local level; however local governments are wary of developing local plans when social inclusion policy tasks could be handed over to municipalities who do not have the necessary funding.

In the **Netherlands**, the municipality is considered to be the level most suitable for tackling social problems. By combining the three budget lines for reintegration, education and civic integration, municipalities help people with tailored solutions, providing technical aid, housing provisions, and accessible public transport. The Social Support Act requires that clients receive advice locally in matters of welfare, sport, disability, voluntary work, and/or social support; however, the population is heterogeneous and certain groups are difficult to reach for legal or cultural reasons. The central state is involved through partnerships between national and local level authorities but otherwise leaves policy to the local authorities.

The financial and administrative responsibilities for public welfare in **Norway** are mainly divided between the state level and the municipalities, with regional authorities playing a lesser role. The central government is responsible for general labour market policy, social insurance and various kinds of family benefits. Municipalities play a crucial role in the provision and implementation of welfare policy; they are responsible for primary health care, day care for children, primary and lower secondary school, care for the elderly and persons with disabilities, social services and social assistance benefits (housing as well but with input from the state). Services and social assistance benefits provided by the municipalities are mainly financed by local taxes and by state block grants to the municipalities, but within the area of social inclusion there has been an increased use of targeted grants for municipalities dealing with specific areas (e.g. child poverty and homelessness).



In terms of social inclusion policy in **Serbia**, responsibilities are divided between the central and the local (municipal) level since there is no intermediary level of government — there is an on-going debate about how this set-up will work in the face of further decentralisation. The central level generally finances cash benefits, such as social assistance and child allowances, while the local government pays for the majority of community based services. Primary and secondary education are handled by the central level, while the local level is in charge of pre-school education, maintenance of primary school facilities, and collection of data on illiterate persons, persons with incomplete education and children with disability. In matters of healthcare and employment, local governments in Serbia have very limited powers.

The role of civil society in general or welfare society in particular

Bulgaria does not have a tradition of active citizen participation; until recently, institutions and experts were the main actors engaged in combating poverty and social exclusion, local communities and citizens did not participate — but this is about to change. Now, the central state and municipalities are obliged to encourage active participation of civil society organisations and social partners in the drawing up and implementation of policies. A Social Inclusion Committee has been established, bringing together business, trade unions and NGOs. Partnerships are also being established at the local level, stakeholders are mobilised, and the people living in poverty and social exclusion are consulted. The ideas of partnership and governance in social inclusion policy are firmly established in the Bulgarian National Action Plan for Social Inclusion 2008–2010 (NAPincl).

In the **Czech Republic**, the greatest challenge with local community plans has been the lack of meaningful involvement with stakeholders. In spite of several attempts to engage different agents and assure their active participation in the development of the local plan, the dialog with other areas of local politics and crosscutting perspectives are limited. NGOs feel their role is limited to ‘experts’ who are brought in to comment on the situation but are not involved in action.



The municipalities which set up neighbourhood action plans in the **Netherlands** usually did so in consultation with other departments, in order to engage them in combating poverty and promoting participation. Gradually, private organisations are also entering the picture; some cities have a Poverty Pact, a joint agreement between the municipality and local social organisations to combat poverty and social exclusion. Neighbourhood plans are supported by broad coalitions of businesses, government, and civil society. The quality of these coalitions at district level largely determines the success rate of the neighbourhood plan.

Norway has a strong state-dominated welfare sector, but NGOs are involved at the local level. The share of civil society welfare services is small, but in recent years NGOs and voluntary organisations have increasingly received targeted public funding to deal with problems of social exclusion, particularly for children and young people. Dialogue between NGOs, user organisations and central government is improving. Service providers offering state financed labour market measures are often private limited companies with the majority of the shares owned by the local municipality or county council, but they may also be private or charitable organisations, municipal agencies or a combination of both.

Romania set up a system for promoting social inclusion in 2006 in preparation for the country's accession to the EU, it included a mechanism to involve the third-sector in discussions, although NGOs have noted the difficulties of getting citizens involved in decision-making. The vast number of NGOs in the country — around 6,000— increases the importance of an umbrella organisation, which is so far absent.

Serbia's local social welfare plans are still in the phase of donor-funded projects. Their development is based on local inter-sector cooperation; they are developed and implemented by local working groups that consist of representatives from all relevant sectors for social inclusion and social protection (they are limited to public administration, however).



Engaging target groups?

In **Bulgaria** more attention is paid to vulnerable groups than to the system that sustains social exclusion, but even so, reaching the vulnerable groups remains a difficult because people are uncomfortable discussing their problems. Where focus groups have succeeded in generating discussions, a lot of useful ideas have been raised and have then been taken to higher levels, with the result that slowly people are seeing the positive results of their participation.

In the **Czech Republic**, the participation of people experiencing poverty and social exclusion is managed by local authorities; despite their participation being a compulsory part of the process, it is poorly enforced and a mere formality when it does occur. Those consulted are mainly social service providers, or a narrow group of service recipients, such as families with children, whereas other groups, such as the Roma or the homeless, do not have the opportunity to express their opinion. The absence of a participatory culture means that many people at risk of social exclusion are not confident enough to express their views, and do not receive enough encouragement to do so.

In the **Netherlands**, the population is very heterogeneous and it remains difficult to reach out to young people, or to those from different ethnic backgrounds for legal or cultural reasons.

EAPN is an EU network of NGOs created in 1990 to fight poverty and social exclusion; they are dedicated to involving people living in poverty in their solutions. For EAPN, National Plans for Social Inclusion are fundamental to the operation of the Open Method of Coordination at the EU level, although there is concern that the current crisis and the new methodology in the Europe 2020 Strategy might pose a threat. EAPN is of the view that the planning process should take place close to where the services are delivered, and that preference should be given to bottom-up, innovative community planning, with stakeholders involved as equal partners in decision-making. EAPN's theory is that when governance is truly 'bottom-up', it will deliver results, guarantee a more evidence-based design of policies, and improve effectiveness through ownership. Examples of good practice are the



pioneering People Experiencing Poverty Meetings (organised with the Belgian EU Presidency/European Commission), EAPN National Meetings, an innovative Peer Review in the UK, the 'Get Heard and bridging the Policy Gap', 'Experience experts' and Dialogue Groups (held in Belgium).

On the one hand, opportunities for mainstreaming social inclusion and participation are increasing as a result of a growing emphasis on decentralisation; the Horizontal Clause in the Lisbon Treaty, the Europe 2020 Strategy with its target to reduce poverty, and the 'new partnership principle' which stresses the importance of building partnerships with stakeholders. On the other hand, pressure from the economic crisis and resulting austerity measures threaten progress because NGO participation is often considered too costly, and the European Commission has suggested cutting National Action Plans on Inclusion, damaging links between national stakeholders and the EU.



D. Discussions at the Peer Review meeting

The Peer Review focused on some of the issues presented below, such as the relation between the national, regional and local level and the role of the third sector, and on some more practical considerations, such as the institutional set up of the programme and the need to have indicators and monitoring. The lessons learnt from the Peer Review meeting will be presented in the second section of “Part D”.

National/regional context

- It is not only the situation itself, but also the definitions of poverty, social exclusion and social inclusion that are used which inevitably make plans differ at the national, regional and local level. A ‘hard’ definition of social inclusion that includes employment, housing and health, will necessitate all-encompassing (local) plans for social inclusion whereas a ‘softer’ definition — limited to welfare — suits a sector-specific approach.
- What is the contribution of the local plans to the Spanish National Plan for Social Inclusion? The relation between local and national plans is two-way: effective national plans stimulate the development of local plans; local plans can give the national plans an evidence-base in which stakeholders, including people living in poverty, are better represented.
- Some services offered are the responsibility of the national, some of the regional, and some of the local authorities. Multilevel governance initiatives could prove useful.

Institutional set up

- One needs to take account of the institutional structure of the country, the different levels: state, regional and local level. And the relationships between them; the degree of autonomy of municipalities in developing their plans is a crucial factor. The historical, political,



and financial are also important determinants of the success of local plans.

- On a practical level, the extent of technical and financial support to local offices needed to support the plan and the effect of the existing municipal and political set-up on the plans should be considered.

The PLIS

- There is an ongoing debate about what the timeframe for local plans should be. Catalonia's PLIS runs over six years. The first three years are used to collect local background data, create local networks, bring in local politicians and the local administration, draw up and get the plan approved, raise visibility and start implementation. The next three years are spent fully implementing plans, strengthening networks, improving visibility, evaluation, and drawing up a follow-up plan. If local authorities already have a grasp on the situation, the first phase could be shorter, bringing the implementation phase forward.
- Local inclusion plans are reacting to a changed environment, and Catalonia's PLIS represents a turning point in implementing its social inclusion strategy. Developments over the last four years have shown that people's situations are becoming less stable as a result of changes in family and social structures, education systems, the labour market and demography making the risk of exclusion higher. As it is also important to be able to plot the 'breakpoint' for people, more focus is put on families and their developments and on building up support networks.
- There was a need to have clear expectations, qualitative and quantitative indicators. Local plans have been successful as there are now professionals to reflect on how to improve measures, but it remains important to measure the impact of actions to improve the efficiency of social inclusion plans. If social inclusion plans intend to be preventive, they should reduce the number of problems and if they are successful they could raise expectations and demand. How to set



realistic expectations of what can be achieved within the framework of local plans is an important question. Specific indicators are needed to measure this and will be developed in the next phase of the plans.

- Since local plans earn legitimacy through their results, information should be collected and disseminated covering their impact and the number of players involved.

Role of the third sector

- Local Action Plans (LAPs) can bring new forms of local governance such as introducing more active citizenship and mobilising partnerships. Bottom-up approaches contribute to the success of the programme, but it is important that socially excluded groups get involved. The Catalan Ministry of Social Action went from granting funds to third-sector organisations for individual initiatives, to developing permanent agreements with them, which will increase their role in the development and implementation of local plans and support progress.
- Successful models of a cooperative, bottom-up process require: a shared vision and goals (all actors as part of the steering group with concrete goals); setting a local framework — which outlines causes and effective solutions — to which stakeholders bring a fresh perspective; and mainstreaming linked to budgeting.
- Support from the Catalan regional government was crucial and the third sector is keen to continue having their support. Nevertheless, there are concerns about whether top-down approaches succeed in reaching the whole population and meeting their needs.

Lessons learned

Lessons were learnt about matters such as the role of national plans (as a favourable context for local plans), the importance of the local context and political support, the need for guidance, indicators and monitoring and for local institutional support and third sector participation.



National Plan for Social Inclusion

- Drawing up a National Plan for Social Inclusion provides an example of good practice for other countries and regional authorities and they constitute a vital tool for the social OMC.
- When a country has a long-standing commitment to combating poverty and other forms of social exclusion and a tradition of working with local communities (regions as well as cities), this has a positive impact on the design, life expectancy and success of a National Plan for Social Inclusion.
- It is important to find a balance between sufficient autonomy for local authorities to adapt the plan to local needs, and control from national or regional bodies (like ICASS) to oversee the implementation of local plans within a broader strategy.
- The creation of an Observatory on Poverty (and Social Exclusion/ Social Inclusion) to provide research has been helpful.

Importance of local context

- The impact of local plans shows the importance of introducing a crosscutting approach to social inclusion, which was emphasised in the new Europe 2020 Strategy. Even after the plan is finished, the need for a crosscutting approach will be institutionalised in the local context.
- It is important to give local offices autonomy to develop plans addressing local needs.
- The success of the local plan depends on the local context — e.g. Catalonia's history of fighting poverty and social exclusion was crucial to its success.

Support and guidance

- Support and guidance from different angles is a condition for a successful development of a local plan, starting with political support at all levels and with high visibility of the plan.
- Strong political leadership and stakeholder commitment is important in enforcing administrative reforms and can help overcome the obstacles imposed by an administration afraid to innovate.
- Local offices need basic indicators for critical areas — such as poverty levels, unemployment, number of social service recipients — in order to be able to measure the effectiveness of the plan.
- Timetables ensure clarity.
- An independent organisation is needed to monitor the plan in intermediate and final evaluations.
- Local offices must have adequate financial and technical resources.
- ‘Buy-in’ from the local administration is essential.
- More use could be made of Internet Platforms — like the e-Catalonia Platform — as a place to store resources, to encourage sharing of information and build networks.

Third sector participation

- It is important to encourage a ‘bottom-up approach’ so that plans are ‘owned’ by the local community; this implies engaging local people and groups from the very beginning of the initiative so that identification starts early on.
- There is a need to clarify the role of civil society organisations in local plans; when organisations are involved in a number of parallel programmes, their efforts can overlap.



- It is important to guard against unrealistic expectations about the role of civil society organisations. NGOs play various roles — some play an advocacy role, while others are service providers — which should be accepted and regarded as positive. Civil society organisations need sufficient support, information, training, and close involvement to fully contribute to the local plan.
- Private organisations should be encouraged to get involved in ‘public-private partnerships’ (PPPs) to help implement local plans.



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The Programme for developing local plans for social inclusion in Catalonia

Host country: **Spain**

Peer countries: **Bulgaria, Czech Republic, Latvia, Norway, Romania, Serbia, The Netherlands**

Thanks to the Generalitat de Catalunya's Programme for Developing Local Plans for Social Inclusion, which was launched in 2006, 32 local authorities within the region have already developed their own plans to promote social inclusion at the local level.

The main target groups of these Plans are the unemployed, young people, the disabled, the Roma population, immigrants and refugees, and the homeless.

The Programme not only provides local authorities with a package of resources to help them devise and implement their own inclusion plans, it also seeks to develop their understanding of social exclusion and to encourage increased collaboration between local public bodies and social organisations in defining social inclusion strategies.

Administrative cooperation, involvement of local agents, proximity of local administration, participation of the socially-excluded and knowledge-sharing among contrasting local experiences form the basis of the programme.

The aim for the future is to widen the Programme to the 103 local authorities that are part of the territory. The Peer Review will serve as an opportunity to identify areas for improvement and to further consolidate Catalunya's territorial social inclusion strategy.