

Facing New Challenges: Promoting active inclusion through social innovation



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SOLIDAR is a European network of 59 NGOs working to advance social justice in Europe and worldwide.

SOLIDAR lobbies the EU and international institutions in three primary areas: social affairs, international cooperation and education.

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FOREWORD

The EU is facing a systemic crisis with dramatic consequences for people living and working in Europe. With its narrow focus on fiscal consolidation and economic stability the current approach to managing the crisis not only ignores the social objectives of the Europe 2020 Strategy, but has already caused social hardship while turning a blind eye to the social costs of austerity in the long run.

In September 2012, the EU27 unemployment rate was 10.6%. Only 34% of young people aged 15-29 were employed in 2011, the lowest figure ever recorded by Eurostat. Additionally, there is a significant increase in the NEETS (Young people not in employment, education or training) rate: From 11% of 15–24-year-olds and 17% of 25–29-year-olds in 2008 it rose up to 13% and 20% respectively in 2011. Moreover, in 2010, 23.4% of the population in the EU27 was at risk of poverty or social exclusion.

Social inclusion is a pre-requisite for the creation of a just and cohesive society in which each individual can fully participate and realise his or her potential. Active inclusion, as one strand of the broader social inclusion concept, deals with inclusion into society of people furthest away from the labour market. As early as 2008, when SOLIDAR replied to the European Commission consultation on active inclusion and contributed to the European Parliament report on active inclusion, we highlighted the need to go beyond labour market inclusion alone and a strategy aimed exclusively at poverty reduction. Today, looking at the situation of people affected by the crisis, there is even more reason to do so.

Social innovation can help achieve active inclusion by enhancing the effectiveness of policies and services in order to maximise positive social impact. This includes increasing the quality of life and work of services users and beneficiaries, as well as the accessibility and sustainability of services. Social innovation should not be used as a fire extinguisher in times of crisis or to further marketise social needs. Such an approach could easily turn social innovation into a means to drive competitiveness and reduce costs instead of a response designed to better meet social needs and achieve active inclusion.

This briefing provides an overview of the current EU policies and approaches towards active inclusion and social innovation before outlining SOLIDAR's approach and considerations on both topics. We suggest enhancing the Commission's active inclusion strategy with a learning society approach and strengthening the integrated approach of the mutually reinforcing strategy strands. Furthermore, we examine the opportunities as well as critical aspects linked to social innovation from the perspective of our members and highlight their role in the social innovation process for active inclusion.

SOLIDAR is a European network of NGOs working to advance social justice, democracy and equality in Europe and worldwide. Our members represent civic movements, bringing together millions of individuals, as well as service providers. They offer social and healthcare services as well as training and lifelong learning for vulnerable, socially excluded, disadvantaged and underprivileged people and social services responding to needs across the life cycle. They have a long-standing tradition in the field of social services, education, training, leisure and cultural activities. As civic movements they contribute to the social cohesion of local communities, encourage civic engagement, and mobilise social capital.

Conny Reuter
SOLIDAR Secretary General

RECOMMENDATIONS

To EU policy makers

Enhance the active inclusion strategy by:

- Tackling poverty not only as the result of insufficient income, but also a lack of opportunities to participate in society, of development deficits, reduced social competences, undersupply, material deprivation and isolation, which lead to significant losses in terms of health gains, nutritional well-being and reduced participation in society.
- Going beyond labour market participation to further develop the strategy into a tool supporting participation in society for all, by investing in minimum income schemes above the poverty line, in the creation of decent work and quality employment, quality social services of general interest as well as in education, training and lifelong learning opportunities, which support personal development and participation in society and the realisation of potentials and life chances.
- Acknowledging the importance of non-formal education and voluntary activities in acquiring qualifications and competencies.

Support Member States in implementing the strategy by:

- Using the European Semester to monitor the implementation of the active inclusion strategy and give country specific recommendations where implementation is lacking or where the different strands are not comprehensively implemented.
- Support social innovation in policies and services to better meet peoples' needs. Social innovation should promote integrated and effective policies and services with maximum social impact in terms of empowerment of people, social inclusion, participation in society and social cohesion. This requires legal and financial conditions enabling social innovation.
- Developing EU projects and programmes that enable sectoral actors at the grassroots level to develop quality systems assessing and stimulating the implementation of the Voluntary European Quality Framework for Social Services in specific social services sectors.
- Supporting the important role played by civil society organisations in formal and non-formal education and promoting cooperation between education institutions and civil society organisations based on complementarity.
- Monitoring the impact of conditionalities in activation policies on the reduction of poverty and social exclusion.

To Member States

Implement the Commission Recommendation on Active Inclusion by:

- Ensuring that minimum income schemes are granted individually, above the poverty line and cover not only EU citizens, but also refugees, asylum seekers and undocumented migrants.
- Promoting labour market policies that are not discriminatory, but tailor-made to users' needs, in coordination with social protection systems, to bring people in precarious situations and far from the labour market back into employment, to help them use their potential and actively participate in society and to prevent the perpetuation of segregated labour markets.
- Including additional principles under the "access to services" strand of the Commission Recommendation, including non-discrimination of access and use of services, rights and empowerment of users, good working conditions, proper financing in accordance with local, regional and national circumstances, and continuous and timely delivery.
- Using the EU Structural Funds and notably the European Social Fund to drive active inclusion and invest in empowering people, in training, education and life-long learning and in the development of skills and competences acquired through informal or non-formal learning. This requires genuine partnership in the development of the Operational Programmes.
- Addressing inequalities in the labour market by eliminating discrimination in recruitment procedures.

EU POLICY CONTEXT

1. The EU Active Inclusion Strategy

In recent years, active inclusion has become a constant claim in communications and recommendations at EU level. The conclusions of the Lisbon Council in 2000 as well as the first European Employment Guidelines from 2007 promoted the ideas of activation and active welfare states. Then, in 2008 and following an extensive consultation process, the European Commission issued a comprehensive “active inclusion” strategy¹ that encourages EU Member States to take action for the active inclusion of people excluded from the labour market. This integrated approach is composed of the following three strands: **adequate income support; inclusive labour markets; access to quality services.**

Based on the social objectives in article 151 and 153 of the Treaty on the Functioning of the European Union (TFEU)² and article 34 of the EU Charter of Fundamental Rights, the general aim of the EU active inclusion strategy is to establish common European principles for all three strands of the concept in order to support Member States when designing or revising their policies. The activities seek to promote the employment and social participation of those who can work. ‘Adequate income support’ means providing the resources required for a dignified life. ‘Inclusive labour markets’ refers to policies and measures to help (re-)enter and stay in employment: improvement of job quality, education and training, as well as tailored, personalised and responsive services and guidance. ‘Access to quality services’ refers to essential services supporting active social and economic inclusion: social assistance, employment and training services, housing support and social housing, childcare, long-term care services and health services.

2. The active inclusion strategy within the framework of the Europe 2020 Strategy

The Europe 2020 Strategy³, which was agreed by the Member States at the June 2010 European Council, sets five headline targets in employment, research and development/innovation, climate change, education and poverty. The social objectives include raising the employment rate, reducing the share of early school leavers and increasing the share of the population having completed tertiary education. Furthermore, a reduction of the number of Europeans living below national poverty lines by 25% is foreseen, lifting 20 million people out of poverty. Although the strategy does not specifically refer to the active inclusion strategy, flagship initiatives under the three priorities of smart, sustainable and inclusive growth are linked to the objective of the active inclusion strategy. This is notably the case for the *European Platform against Poverty and Social Exclusion*, the *Agenda for new Skills and Jobs* and the *Youth on the Move* initiatives.

Additionally, the European employment guideline no. 10 on “Promoting social inclusion and combating poverty” directly refers to the strategy: “Empowering people and promoting labour market participation for those furthest away from the labour market while preventing in-work poverty will help fight social exclusion. This would require enhancing social protection systems, lifelong learning and comprehensive active inclusion policies to create opportunities at different stages of people’s lives and shield them from the risk of exclusion, with special attention to women”.⁴

¹ European Commission: Communication from the Commission to the Council, the European Parliament, the Economic and Social Committee and the Committee of Regions on a Commission Recommendation on the active inclusion of people excluded from labour market, COM(2008) 639 final, Brussels, 3 October 2008; available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2008:307:0011:01:EN:HTML>

² The recommendation was originally based on ex-article 137 of the EC Treaty, which was still in place at the time the strategy was developed.

³ European Commission: Communication of the Commission, Europe 2020 – A strategy for smart, sustainable and inclusive growth, COM(2010) 2020 final, 3 March 2010, Brussels; available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:2020:FIN:EN:PDF>

⁴ Council decision on guidelines for the employment policies of the Member States, (2010/707/EU), Brussels, 21 October 2010; available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:32010D0707:EN:NOT>

When preparing for the second European Semester, the European Commission considered in its Annual Growth Survey 2012 that Member States should give priority to the implementation of the active inclusion strategy to tackle unemployment and the social consequences of the crisis.⁵ Despite this recommendation, the strategy as such has not been applied in the revision of the National Reform Programmes: none of the Commission's country specific recommendations refer to the strategy or its mutually reinforcing strands in areas in which they lack implementation.

Currently, the European Commission is revising the implementation of its strategy. A Commission report on the follow-up of the 2008 Recommendation on active inclusion is announced for the end of the year 2012. It will be based on multilateral thematic surveillance on active inclusion within the Social Protection Committee (SPC), a consultation with relevant social stakeholders, a report on active inclusion by independent experts on social inclusion, as well as on European Parliament pilot projects on *Social Solidarity for Social Integration*. Furthermore, the Commission announced the continuation of its work on the indicators within the Indicator Sub-Group of the SPC to explore new ways to strengthen the quantitative analysis of the strategy.

3. Social innovation – a new concept in the Europe 2020 Strategy

The concept of social innovation is not new, but has recently become a priority in the EU policy arena. Social innovation is a major concern within the Europe 2020 Strategy, although there is not a common EU definition yet. The concept received considerable attention in recent legislative proposals, recommendations, EU programmes and EU research projects.

Broadly speaking, social innovation can be defined as "new ideas that work in meeting social goals"⁶. According to the Bureau of European Policy Advisers "innovation refers to the capacity to create and implement novel ideas [...] proven to deliver value", whereas "social refers to the kind of value that innovation is expected to deliver: a value that is less concerned with profit and more with issues such as quality of life, solidarity and well-being".⁷ In the social service sector, social innovation means new practices, policies or processes to meet social needs and address societal challenges by improving the delivery, availability, quality and effectiveness of an existing service to create a new service to better meet users' needs.⁸

Social innovation involves various actors determining its development and social outcomes. Innovative social services can emerge at different levels of service provision and be represented by a new product (i.e. a new service) or by a new process (i.e. a new form of service delivery or a new form of service evaluation): "Social innovations are innovations that are social both in their ends and in their means...new ideas (products, services and models) that simultaneously meet social needs (more effectively than alternatives) and create new social relationships or collaborations. In other words they are innovations that are both good for society and enhance society's capacity to act."⁹

Like active inclusion, social innovation is a theme that runs through many of the Commission's key initiatives underpinning the Europe 2020 Strategy, from the *New Skills* agenda and the *European Platform against Poverty* to *Horizon 2020*, the 8th EU framework programme for research and innovation, that commits to addressing societal challenges, including making progress towards 'inclusive, innovative, secure societies'.

⁵ European Commission: Communication from the European Commission, Annual Growth Survey, COM(2011) 815 final, Brussels, 23 November 2011, page 12; available at: http://ec.europa.eu/europe2020/pdf/ags2012_en.pdf

⁶ Geoff Mulgan: Social Innovation: What it is, why it matters and how it can be accelerated, The Young Foundation, London, 2007; available at: http://www.youngfoundation.org/files/images/03_07_What_it_is_SAID.pdf

⁷ BEPA (2010) Empowering people, driving change: Social innovation in the European Union , available at: http://ec.europa.eu/bepa/pdf/publications_pdf/social_innovation.pdf

⁸ See the first results of INNOSERV, an FP7-project coordinated by the University of Heidelberg, jointly implemented with SOLIDAR, available at: www.inno-serv.eu

⁹ European Union/The Young Foundation: Study on Social Innovation, Brussels, 2010; available at: http://www.youngfoundation.org/files/images/study_on_Social_Innovation_22_February_2010_0.pdf



INNOSERV, a social platform on innovative social services

SOLIDAR is a participant in INNOSERV¹, an FP7-project coordinated by the University of Heidelberg and aimed at developing better knowledge about the drivers and barriers of social innovation in the social service sector. The project explores the key factors for innovation in the provision of health, education and welfare services across Europe, focusing on theoretical discussions as well as on empirical evidence. It also aims at establishing a social platform on innovative social services bringing together representatives of the research, practice and policy communities in the field of social service planning, provision and evaluation.

The first results of the project identified the following types of innovation in social, health and education services¹:

- New services meeting unmet social needs;
- New forms of service delivery (i.e. participation of different stakeholders such as users, universities, social enterprises);
- New forms of governance;
- New financial resources;
- Specific targeted actions;
- New forms of evaluation.

More information available at: www.inno-serv.eu



Over the years, the EU has supported social innovation through several instruments, including EQUAL and PROGRESS programmes and the European Framework Programme for Research and Technological Development (FP). The draft legislative package on cohesion policy for the period 2014-2020, which was adopted by the Commission last October, will continue this policy: The proposals for the European Social Fund (ESF) regulation, the European Regional Development Fund (ERDF) regulation and the new EU Programme for Social Change and Innovation (EPSCI)¹⁰ will support investment in and scaling-up of social innovations and facilitate capacity building.

4. Social policy experimentation – an EU approach to testing social innovations

At the EU level, the idea of social innovation is often linked to “social policy experimentation”. It is understood that the development of innovations should be based on evidence and experience of “what works”. Social policy experimentation provides a means to test innovations before implementing them widely. According to the European Commission, social policy experiments are policy interventions bringing innovative answers to social needs with the ultimate aim of improving the quality and effectiveness of social policies and facilitating their adaptation to new social needs and societal challenges. They are introduced on a small scale because of existing uncertainty as to their impact, in conditions which ensure the possibility of measuring their impact and in a way that allows their repetition on a wider scale if the results prove convincing.¹¹

Currently, the EU facilitates social policy experimentation projects through the PROGRESS programme. The EPSCI programme will support social policy experiments in the new programming period (2014-2020) with the aim of helping to develop adequate, accessible and efficient social protection systems and labour markets and enhance evidence-based social change and innovation. It will support policy coordination, sharing of best practices, capacity building and testing of innovative policies as well as the scaling up of the most successful measures.

¹⁰ European Commission: Proposal for a regulation of the European Parliament and of the Council on a European Union Programme for Social Change and Innovation, COM(2011) 609 final, Brussels, 06 October 2011, available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52011PC0609:EN:NOT>

¹¹ European Commission: Call for Proposals VP/2012/007, Call for proposals for social policy experiments, PROGRESS 2012, Budget heading 04.040102, Brussels, October 2012; available at: <http://ec.europa.eu/social/main.jsp?catId=630&langId=en>

SOLIDAR'S APPROACH TO ACTIVE INCLUSION

1. Active Inclusion is more than workfare

Since the Lisbon Council in March 2000, “activation” is a key concept of EU strategies addressing poverty reduction and social inclusion. It implies the adaptation of welfare states to ensure work incentives in and financial sustainability of social protection schemes, a stronger investment in the development of “human resources”¹² to increase peoples’ employability as well as an expansion of social services. With its three strands (adequate income support; inclusive labour markets; access to quality services) the Commission’s active inclusion strategy for people excluded from the labour market is an important step towards widening the perspective and going beyond a simplistic workfare approach. It perceives poverty and social exclusion as a result of monetary poverty, insufficiently incentive-driven social protection, a low investment in education and lifelong learning, and a lack of public services that allow (re-)integration into the labour market.

Nevertheless, the concept falls short in at least two aspects: First, participation in the labour market is still seen as crucial in combating poverty and social exclusion – because of its income securing function and/or its assumed social inclusion effect in general. As it is defined today, the active inclusion strategy completely ignores those groups who cannot work or fully participate in labour market, the steep increase of poverty amongst old people as well as child poverty. Secondly, the employment pillar of the concept does not sufficiently address the quality of work and the growing group of working poor. This is particularly problematic, given the fact that the majority of the jobs created since 2009 have been part-time jobs and temporary contracts. Growing precariousness in employment decisively diminishes the inclusion and poverty prevention potentials of employment. Instead, sustainable, high-quality work needs to be promoted that is adequately remunerated and respects the principle of equal pay for work of equal value.

These conceptual flaws negatively affect the understanding of our social security schemes, which are based on social rights. Currently, social security is still a bundle of arrangements that help offset or compensate for recognised ‘social risks’.¹³ From this perspective, the social right to support and benefits is linked to a legitimate ‘inactivity’ in a situation of need. By increasingly linking social rights to the fulfilment of certain criteria, and by introducing sanctions, these rights are however subject to conditionality: free choice and the possibility of rejecting indecent working conditions are jeopardised. Poverty and social exclusion are interpreted as an individual failure or lack of effort rather than a problem of redistribution of wealth and opportunities.

Instead, SOLIDAR considers social rights as a fundamental and inextricable part of civil rights. Only where economic, social and cultural rights are guaranteed, can civil rights be fully exercised and participation realised. Against this background and following the European Parliament resolution on the active inclusion strategy, SOLIDAR calls for a monitoring of the impact of conditionalities in activation policies on the reduction of poverty and social exclusion.¹⁴

2. Active Inclusion requires an investment in quality social services

The third pillar of the Commission’s active inclusion strategy focuses on social services of general interest (SSGI). Given the experience of its member organisations, SOLIDAR is concerned about the fact that the third pillar, access to quality services, is insufficiently developed, and that the integrated approach the strategy was originally calling for has been somehow overlooked. According to the Commission, social

¹² European Council: Presidency Conclusions, 23 and 24 March 2000, Lisbon, article 26, available at: http://www.europarl.europa.eu/summits/lis1_en.htm

¹³ Danny Pieters: Social Security. An Introduction to the basic principles, 2nd edition 2006, page 31.

¹⁴ European Parliament: Resolution on the active inclusion of people excluded from the labour market, P6_TA(2009)0371, Brussels, 6 May 2009, Recital L; available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2010:212:0023:01:EN:HTML>

services are pillars of European society and the European economy.¹⁵ They cover the main risks of life, play a preventive and social cohesion role and consist of customised assistance to facilitate social inclusion and safeguard fundamental rights. Two main functions of social services can be derived from the Commission's second consultation paper on active inclusion¹⁶:

- (1) Preventing social exclusion, promoting social inclusion and safeguarding fundamental rights
- (2) Enhancing employability and integration into the labour market.

These two main functions of inclusion – social and economic – are mutually reinforcing, and many social services will ultimately contribute to both objectives. For social services to fulfil these functions, it is however important that they are of high quality.

The Voluntary European Quality Framework for Social Services (VEQF) that was launched by the SPC in November 2010 is an important milestone on the road to a common approach and to enhancing quality in the social services sector. However, the European Commission should further stimulate the use and implementation of the VEQF and better assess the compliance of services with the VEQF. Several Member States have already launched initiatives to implement the VEQF in their social services sectors. However, these are often top-down initiatives whereby the Ministries recognise existing quality systems to assess and certify compliance. Future EU projects and programmes should enable sectoral actors at the grassroots level to develop quality systems that assess and stimulate the implementation of the VEQF in specific social service sectors.

3. Enhancing the active inclusion strategy: Promote inclusive learning societies

SOLIDAR's approach towards participation in society follows a multiple life dimensions approach¹⁷ to poverty and social exclusion. This encompasses living conditions and resources in several dimensions, goes beyond participation in the labour market and highlights the importance of interpersonal relationships, health, education, political and cultural participation. For SOLIDAR, poverty and social exclusion are not limited to insufficient income, but are also reflected in development deficits, low self-confidence, reduced social competences, undersupply, material deprivation, and isolation, which lead to significant losses in terms of health gains and nutritional well-being as well as hampering social cohesion.¹⁸

Thus, a holistic, integrated and coherent active inclusion strategy is required that considers participation as an opportunity to realise potentials and life chances. Such an approach would not separate policies on active inclusion within the three pillars from policies and services for all citizens across the life cycle. It would comprise the following elements:

- 1) **an EU-wide, individually guaranteed minimum income above the poverty line** that should not stigmatise people and force them into precarious or indecent work or low skilled jobs;
- 2) **not just access to labour market but access to quality and sustainable employment**, a better work-life-balance and an investment in job retention policies;
- 3) available, accessible, affordable and **quality social and health services**;

¹⁵ European Commission: Communication from the Commission on Implementing the Community Lisbon programme: Social services of general interest in the European Union, Brussels, 26.4.2006, COM(2006) 177 final; available at: http://ec.europa.eu/employment_social/social_protection/docs/com_2006_177_en.pdf

¹⁶ European Commission: Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions - Modernising social protection for greater social justice and economic cohesion: taking forward the active inclusion of people furthest from the labour market, Brussels, 17 October 2007, COM(2007) 620 final, available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52007dc0620:EN:NOT>

¹⁷ The „multiple life dimensions approach“ in social reporting overcomes monocausal explanations for poverty and social exclusion by illustrating different dimensions of life and their interdependency. See Dietrich Engels: Living Conditions and Social Exclusion. Theses for re-formulating the „Living Conditions“concept for social reporting, in: Zeitschrift „Sozialer Fortschritt“ Heft 5, Mai 2006, S. 109 – 117.

¹⁸ Claudia Laubstein/Gerda Holz/Jörg Dittmann/Evelyn Sthamer: Von alleine wäschst sich nichts aus. AWO-ISS long-term study on life dimensions, life course and future prospects of (poor) children and adolescents, Frankfurt am Main, September 2012, page: 9-11.

- 4) available, accessible, affordable and **quality education, training and lifelong learning** opportunities, which support personal development and participation in society and the realisation of life chances and potentials.

This fourth pillar, which goes beyond the current strategy, is crucial since it assumes that lifelong learning is much more than just an educational process happening across the individual's life span. Instead, it is a personal development process that transforms the mindset, important both for human life and for society at the same time. It comprises formal learning but also competences acquired through informal and non-formal learning that contribute to both personal and professional fulfilment. Thus, besides equipping people with knowledge and skills, strategies need to be developed that focus on 'skills utilisation'. This means enabling people to make an immediate positive difference to their life and workplace thanks to policies and services promoting participation, volunteering and active citizenship or other forms of social and cultural engagement.

In addition to this, vocational training and learning workplaces can contribute to active inclusion, as they would provide employees with more opportunities to learn and develop their skills, competences and knowledge so they can grow at work and access better life chances. This concept raises interest in the training and personal development of workers with poor self-confidence, a low level of basic skills and a lack of awareness of the education and training provisions available. It includes offering career guidance to people and stimulating them to take up life opportunities and realise their potential in and outside the labour market. Such an approach is supported by the currently negotiated Commission proposal for a European Social Fund (ESF) regulation as well as by the European Parliament report. The latter stipulates that "Investing in education, training and vocational training, skills and life-long learning" should include "non-discriminatory access to lifelong learning, upgrading the skills, formal and informal knowledge, qualifications and competences of the workforce and increasing the labour market relevance of education and training systems for all age groups".¹⁹

4. Stop cherry picking: The need for integrated and comprehensive implementation

With regard to inclusive learning societies, SOLIDAR members often experience a deficit in support mechanisms and policies at the intersections of education and employment as well as the intersections of employment policies and social or educational service provision (e.g. social protection, training and social guidance and healthcare services). In addition, members report a failure to integrate and mutually reinforce implementation of the current active inclusion strands. In some countries this even leads to a cherry picking policy where one or two of the strands are played off against another. This results in an unbalanced approach towards activation policies without proper social protection.

An integrated, comprehensive and sustainable implementation of the different strands of an enhanced active inclusion strategy is needed therefore. This implies close cooperation between the different services and a long-term perspective in developing policies and programmes. Furthermore, effective policies and services supporting peoples' inclusion have to be tailor-made, targeted and should be developed together with beneficiaries and service users to best meet their needs. Active inclusion policies also need to have a long-term perspective looking at side effects and cost developments in the long run.

SOLIDAR suggests using the future ESF programming period to drive enhanced active inclusion. This requires Operational Programmes, which are developed in a genuine partnership principle involving all relevant stakeholders on an equal footing, including service providers, user groups, civil-society organisations and social partners. This ensures that ESF programmes are not just focussed on employment and employability promotion and that managing authorities do not just interpret the legislative provisions in a path dependent way, stressing employability with less emphasis on the services and minimum income pillars.

¹⁹ European Parliament: Report on the proposal for a regulation of the European Parliament and of the Council on the European Social Fund and repealing Regulation (EC) No 1081/2006, (COM(2011)0607, Brussels, 20 August 2012, amendment 51; available at: <http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-%2f%2fEP%2fTEXT%2bREPORT%2bA7-2012-0250%2b0%2bDOC%2bXML%2bV0%2f%2fEN&language=EN>

SOLIDAR'S APPROACH TO SOCIAL INNOVATION

1. Supporting social innovation to best meet peoples' needs

For SOLIDAR members, developing new solutions or improving existing ones in order to overcome societal challenges and better meet people's needs is the starting point of social innovation and a crucial part of their daily work. Innovations emerging from this process contribute to achieving the social objective of the Europe 2020 Agenda.

Current suggestions and discussions by the European Commission seek to promote social innovation and social entrepreneurship as key tools to achieve the objectives of the Europe 2020 Strategy and to meet societal challenges. By linking social economy and social innovation, the Commission's Social Business Initiative²⁰ intends to achieve both: smart and inclusive growth as well as the search for new solutions to societal problems, in particular the fight against poverty and exclusion. This should be achieved by promoting the development and employment potential of these market actors by tackling issues such as access to funding, legal recognition and visibility of the sector.

SOLIDAR welcomes the shift from a purely economic and technological consideration of innovation and investment to social innovation, the creation of social value and social return on investment. Yet, we doubt that focusing on market solutions will succeed in reforming our welfare states and service provision sustainably. Developing business models to meet unmet social needs ignores the fact that social service provision often does not follow a market logic. They are not driven by market imperatives but by individual and community needs as well as values such as social justice, solidarity and social cohesion

SOLIDAR members' experience shows that innovation is complex and does not only derive from market competition. At local level, the need to innovate existing policies and practices is driven by different factors such as: demographic changes, changing social patterns (new paradigms, independent living, aspiration etc.), inequalities, economic and social consequences of the crisis (e.g. reduced financial support for social services providers), technological developments (e.g. medical advance) and organisational changes/restructuring management style²¹.

Triggered by these drivers, social innovation is not yet necessarily contributing to peoples' well-being and to best meeting their needs. Depending on the objectives, the development, implementation and evaluation modalities, social innovations are ambivalent. Should social innovation aim at cost-effectiveness, growth and employment or should it contribute to "genuine social objectives such as the realisation of human rights, user orientation, or non-discriminatory and low-threshold access to services of general interest"²²?

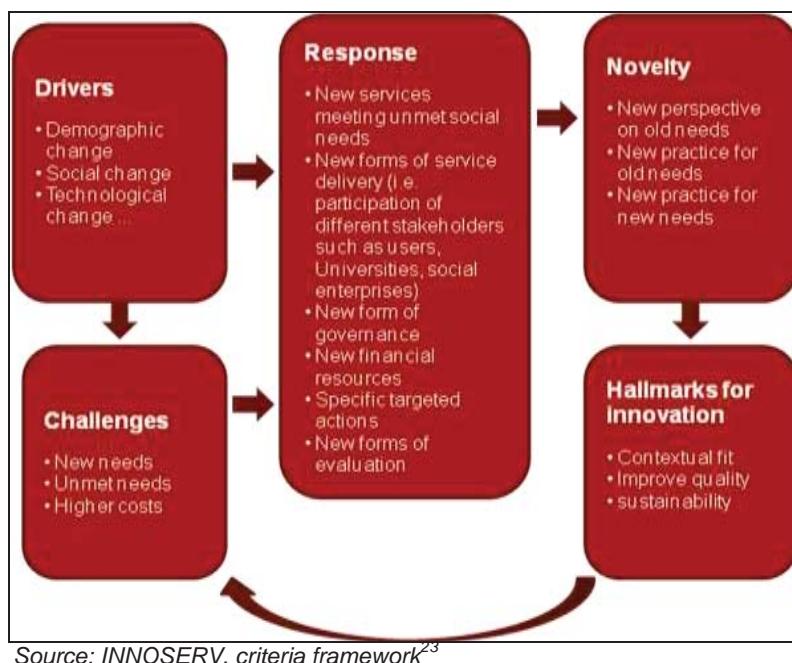
Before thinking about how to foster and scale-up innovation, SOLIDAR believes it necessary to clarify what kind of social innovation should be promoted. To this end, an analysis of the social impact and hallmarks of social innovation is needed to evaluate the effect on society of a certain innovation and to decide if it can be implemented and scaled up. In the framework of INNOSERV, hallmarks for innovation comprise:

- the contextual fit and transferability from one context to another, given the diversity of social services contexts within the EU;
- an improved availability, accessibility, affordability, quality and sustainability of social services;
- progress towards the headline targets of the Europe 2020 Strategy for 'smart, sustainable and inclusive growth'; as well as
- maximum social impact in terms of empowerment of users, social inclusion and participation in society, social cohesion, urban regeneration.

²⁰ European Commission: Communication, Social Business Initiative, COM(2011) 682 final, Brussels, 25 October 2011, available at: http://ec.europa.eu/internal_market/social_business/docs/COM2011_682_en.pdf

²¹ Chris Hawker, Jane Frankland: Theoretical trends and criteria for 'innovative service practices' in social services within the EU, INNOSERV Work package 2 Report, August 2012, p.17. Available at: www.inno-serv.eu

²² Johannes Eisenbarth: Social, entrepreneurial, innovative? In: Institute for Social Work and Social Education: Observatory for Sociopolitical Developments in Europe, Newsletter 1/2012, Frankfurt am Main, page 5.



Source: INNOSErv, criteria framework²³

2. The role of SOLIDAR members in promoting active inclusion through social innovation

Together with other members of the Social Services Europe network²⁴ and based on the experience of its member organisations, SOLIDAR describes social innovation as the process by which new responses to social needs are developed in order to deliver better social outcomes. This process is composed of four main elements²⁵:

- 1) Identification of new or unmet social needs;
- 2) Development of new solutions in response to these social needs;
- 3) Evaluation of the effectiveness of new solutions in meeting social needs;
- 4) Scaling up of effective social innovations.

Identifying new or unmet social needs

Social and health care service providers, volunteering organisations as well as training and education organisations play a key role in identifying social needs. They are often on the frontline as new needs emerge; new groups of people use their services or they meet people who have needs that their service cannot fully meet. They are able to identify gaps in the existing provision and the actual or possible unintended consequences of policy and practice on vulnerable service users.

Development of new solutions

In order to ensure that resources allocated to social innovation are best used to achieve or improve active inclusion as well as social cohesion, it is fundamental that social and health care service providers as well as relevant volunteering, training and education organisations are fully involved in all the stages of the innovation process; their concerns have to be taken into account when planning, developing, testing and scaling up social innovation. Including these actors reduces the risk of oversimplifying or misdiagnosing needs by providing a concrete link to the social realities that should underpin policy and practice

²³ Chris Hawker, Jane Frankland: Theoretical trends and criteria for 'innovative service practices' in social services within the EU, INNOSErv Work package 2 Report, August 2012, p.9. Available at: www.inno-serv.eu

²⁴ More information on the network at: <http://www.socialserviceseurope.eu>

²⁵ Social Services Europe: Social Innovation: The role of social service providers, Brussels, July 2012; available at: <http://www.socialserviceseurope.eu/publications/item/34-briefing-on-social-innovation-in-social-services>

objectives. Social service providers can play a particularly valuable role as a link between service users and other stakeholders.

The added value of the established sector in maximising the social impact of innovative services can be summarised as follows:

- **Social service organisations are locally based:** they have a unique relationship with service users and they can drive their users' involvement in the process of identification of needs;
- They have **specific expertise and represent a source of precious information on social needs;**
- Most of the organisations are **deep-rooted in society and have a long-term commitment** to meeting social needs and promoting the wellbeing of service users.

Evaluation of effectiveness of new solutions

A new solution cannot be a guaranteed success from the outset. Innovations always have an element of risk, especially if an approach is entirely new. Therefore, once developed, solutions should be evaluated on the basis of their effectiveness, sustainability and cost-effectiveness. It must also be understood that some approaches may be found to be unsuccessful; this is the risk when developing innovation and must be taken into account. The long-term providers of social services have a key role to play in evaluating social innovation because of their acquired experience and expertise. They are also in a privileged position to involve users, to build consensus between partners and to help identify which outcomes should be measured.

Social policy experimentation – a useful evaluation tool?

Social policy experimentation provides an opportunity for testing and evaluating social innovations and thus for providing evidence on effective approaches. One option for social policy experimentation is assessing the impact of innovative practices on a 'test population' against the situation of a 'control group'. However, for some policy measures, strict experimental methodologies such as randomised control trials may not be the most appropriate evaluation method because they are resource-intensive and can in some cases raise ethical objections.

Social policy experimentation requires financial means and time to be implemented and evaluated. Particularly in the case of social services as well as education and training, providers must ensure high quality as well as continuity, accessibility, availability and comprehensiveness. These factors could become barriers to participation in experimental programmes and must be fully taken into account in the design of experiments. More generally, assessing the impact of social innovation is challenging since the link between the impact of services and the achievement of objectives can be hard to demonstrate. Sometimes outcomes are only evident over longer timeframes and it is difficult to establish a causal relationship between interventions and outcomes. Social service providers experience this type of practical and methodological problem when trying to measure their social impact.

A positive social outcome depends on diverse factors and conditions. Because of these challenges social service providers can come under pressure to concentrate only on activities that are easily measured, quantified and/or externally recognised. Such an approach restricts the development of 'soft' outcomes such as social and emotional capacities, which represent a keystone of the added value of these services. It could also lead to cherry-picking policies, where service providers only concentrate on groups and services that can easily demonstrate their success. This would however exclude the most vulnerable persons from the support they need to participate in the labour market and in society in general.

Scaling-up of effective social innovations

Social policy experimentation and others evaluations methods can help demonstrate the effectiveness of an innovative solution. On the basis of this assessment, policymakers and other relevant stakeholders can set up strategies to decide which solution to scale up in order to achieve the greatest impact on people's quality of life. Social service providers have a key role to play in the scaling-up of effective innovative approaches. They can help policymakers and other stakeholders to define the conditions for successful scaling-up, taking into account users' needs.

SOLIDAR MEMBERS' CASE STUDIES: SOCIAL INNOVATION FOR ACTIVE INCLUSION



WORKERS' SAMARITAN FEDERATION

Arbeiter-Samariter-Bund

1. GERMANY: Empowering people with mental disabilities to contribute to active inclusion

'BBBZ' is a meeting, counselling and employment centre managed by ASB²⁶ in the Falkensee Region (Germany) which aims to empower people with mental disabilities and/or severe psycho-social impairments as well as improve their chances of participating in society, accessing the labour market and living independently.

The centre is innovative because it contributes to filling the gap created by the lack of services to support and motivate mentally disabled people to access the labour market in Germany. Examples of services offered are: psycho-social support, workshops and group activities on dealing with everyday life problems and improving independent living as well as training to improve disabled people's learning skills and ability to work.

By helping remove barriers and improve the social inclusion and integration of the disabled in society, the centre gives a chance to people who had no chances. The project was started in 2010 and received a high level of acceptance and recognition from civil society and local institutions. It is financed by funds from the agency for the promotion of employment and its own funds.

How this innovative service contributes to active inclusion

Empowering people with disabilities!

By providing a large range of services, the centre contributes to improving the social skills, independency, self-confidence, creativity, learning skills and ability to concentrate of the users. This contributes to their personal empowerment and active participation in society.

Inclusive labour market!

People participating in the activities of the centre are also given practical help to access to labour market thanks to work training activities that test their ability to work and provide low-intensity additional income opportunities within and outside the ASB.

Find more

Website: www.asb.de/regionalsuche.html?tx_asbservices%5buid%5d=818

²⁶ Arbeiter-Samariter-Bund (ASB) is the one of the largest NGOs in Germany providing social and healthcare services as a result of professionally implemented tasks carried out by dedicated volunteers and employees. Examples of services offered are: emergency rescue services, housekeeping assistance, meal services, home care services, child care services, assistance for disabled people and services for older people. Find more: www.asb.de

SOLIDAR MEMBERS' CASE STUDIES: SOCIAL INNOVATION FOR ACTIVE INCLUSION



WORKERS' WELFARE ASSOCIATION

2. GERMANY: Childcare facilities for employees to contribute to active inclusion

'ElternService' is a national programme run by AWO²⁷ providing advice and support services for companies that wish to offer child care facilities to their employees. The service offers legal advice and support in finding the best care arrangements in each individual case. In addition, it offers advice and psychosocial counselling in the case of burnout or bullying which have a negative effect on workers' ability to reconcile work and family life.

The growing participation of women in the labour market is part of a process of changes in family patterns resulting in an increasing demand for childcare facilities. This service is innovative because it responds to this new need emerging in society by using the comprehensive coverage of AWO services at the local level across Germany and enabling individual arrangements to meet the needs of companies and employees. In addition, the service provided by AWO allows mothers and fathers to participate in the labour market and reconcile work and family life. In the absence of formal care facilities parents need to look after their children or dependent relatives and this can be a reason for exclusion and discrimination in the labour market. Against this background, ElternService contributes to the creation of an inclusive labour market and sustainable growth.

How this innovative service contributes to active inclusion

Responding to the increasing need of childcare facilities!

This service represents a tailor-made solution for working mothers and fathers in need of child care facilities, allowing them to reconcile work and family life.

Inclusive labour market!

A lack of childcare facilities can prevent women from participating in the labour market and thus hamper women's economic rights and independence. With its ElternService, AWO contributes to the EU2020 target of improving workers' job opportunities and increasing the employment rate.

Find more

Website: www.elternservice-awo.de

²⁷ AWO (Workers' Welfare Association) is one of the leading associations for non-profit welfare work in Germany. AWO's services include homes and residential communities, day-care centres for children, minors and older people, counselling services for migrants, families, unemployed people and persons with disabilities, ambulance services and social care services. Find more: www.awo.org

SOLIDAR MEMBERS' CASE STUDIES: SOCIAL INNOVATION FOR ACTIVE INCLUSION



3. ITALY: Intergenerational cohabitation to promote active inclusion

Abitare Solidale is a project carried out by AUSER²⁸ together with the Municipality of Florence and the association ARTEMISIA²⁹. The project supports intergenerational cohabitation as an integrated solution to tackle different kinds of social problems. This project offers an innovative and sustainable solution to older people in need of help for household maintenance and household keeping as well as to persons experiencing economic difficulties who are in need of affordable and decent accommodation and to women who are victims of domestic violence and in need of a temporary shelter. Social workers, public authorities and volunteers work together to provide tailor-made housing solutions as well as support and protection (through ad hoc legal tools) to users in all stages of the cohabitation.

The project facilitates the creation of interpersonal relationships and promotes the value of solidarity between generations as a way to actively participate in society and combat isolation. Moreover, *Abitare Solidale* is environmentally-friendly and highly sustainable: it is based on the optimisation of existing housing stock and represents an alternative to retirement houses which are not sustainable in the long-term for structural and environmental reasons.

How this innovative project contributes to active inclusion

Tackling the consequences of demographic change!

The project represents a solution to coping with the problem of isolation and social exclusion of older persons. It allows older people to stay longer in their homes improving their active participation in society, independent living and self-determination. It represents a solution to the decreasing availability of informal caregivers (women, family networks) and an alternative to retirement houses.

Tackling the consequences of the economic crisis!

The project helps people in need to find an affordable and decent accommodation allowing them to actively participate in society. It offers an innovative solution to new causes of poverty and social exclusion: precarious jobs, migration, people not entitled to public protection schemes and/or to public care services. Based on mutual aid, the project represents an alternative to the isolation and stigmatisation of people facing financial or personal difficulties and provides them with practical support for their (re)integration into society.

Find more

Website: www1.auser.it/IT/Page/t01/view_html?idp=288

²⁸ AUSER is a volunteer association in Italy which supports the right of older people to continue to play an active role on a social and economic level by making the most of their specific experiences, skills and abilities. AUSER promotes older people's work as volunteers in several areas of activity such as training and education, social utility and international solidarity. Find more: www1.auser.it/IT/Page/t01/view_html?idp=288

²⁹ ARTEMISIA is an association that protects women and child victims of domestic violence. Find more: <http://www.artemisiacentroantiviolenza.it>

SOLIDAR MEMBERS' CASE STUDIES: SOCIAL INNOVATION FOR ACTIVE INCLUSION



4. NETHERLANDS: Improving people's financial and administrative skills to promote active inclusion

Financial Home Administration is a programme carried out by Humanitas³⁰ to provide support to people unable to manage their financial and administrative work independently. This project represents a social innovation as it fills a gap in the service provision by intervening at an earlier stage than the classic debt relief services in the Netherlands and addressing a new need that has emerged in society as a consequence of the economic crisis. The project aims at preventing social poverty and social exclusion. In addition it contributes to the empowerment of users, improving their skills and abilities as well as promoting their active inclusion and (re-)integration in society. The support given by volunteers is mostly short term and is adapted to the specific needs of the users. Examples of users are: people experiencing financial troubles (i.e. as a consequence of bankruptcy, indebtedness or displacement); young adults facing difficulties with financial management (i.e. as consequence of illiteracy or a low level of education); ex-prisoners needing administrative support to reintegrate into society.

In order to evaluate the effectiveness of this service and its impact on people's life, Humanitas commissioned an in-depth research to the University of Tilburg. This innovative method of evaluation represents a source of evidence-based information, which can be used to better allocate resources in the future development and implementation of Humanitas projects.

How this innovative service contributes to active inclusion

Improving people skills and competences!

As part of this programme, users acquire new financial skills and abilities and learn (step by step) how to independently manage their administrative work. This programme offers them concrete help to overcome existing financial troubles and to prevent problems becoming more serious. Users say they have experienced activating incentives and a safe space to exercise with new/renewed skills.

Empowering people!

By learning new skills and acquiring new abilities as well as establishing a personal relationship with the volunteer, users improve their self-confidence and independence. Based on solidarity and independence, the support offered by volunteers is more than merely 'administrative' and contributes to the empowerment of the user and her/his (re-)integration in society.

Find more

Website: www.humanitas.nl

³⁰ Humanitas is a non-profit association employing more than 11.000 volunteers across the Netherlands to support people in need of social and (health)-care services. Humanitas offers a broad spectrum of activities such as projects for (former) prisoners, addicts, homeless people, migrants, counselling and group support for people dealing with grief and loss.