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“Reinforcing Policy Learning for Roma Inclusion”

ESF Roma Inclusion Learning Network (*EURoma +*)

Minutes of launch meeting

28th May 2013, Brussels

The launch meeting of this the new ESF Roma Inclusion Learning Network (*EURoma +*) took place on the 28th May 2013 in Brussels. **Olga Robles** (Head of Spanish ESF Managing Authority and Network Leader) and **Stanislav Ranguelov** (European Commission, Coordinator of ESF Monitoring in Spain, Unit E4, DGEMPL) opened the launch meeting of *EURoma +* with some welcoming words.

Ms. Robles emphasised the progress made to date in terms of raising Roma issues on the political agenda of the EU and Member States, and in terms of explicitly addressing Roma inclusion issues in Structural Funds (SF). In fact, in 2007 the question was how to include Roma in SF. By 2013, stakeholders are focusing on how to achieve real impact through SF on the living conditions of the Roma population, especially in a context of crisis; on how to reach the most disadvantaged groups to prevent greater social fracture. She underlined the emergence of a favourable political context for Roma inclusion with the recent development of an EU Framework for National Roma Integration Strategies (NRIS). Today, the challenge is to reduce the gap between this positive policy framework and its implementation on the ground, and to link the NRIS to Partnership Agreements (PAs) and National Reform Programmes (NRPs).

Ms. Robles underlined the current key moment as the decisions taken this year regarding PAs and Operational Programmes (OPs) will have long-term implications (2014-2020). The planning process must be based on the lessons learned and should concentrate objectives to achieve a more effective use of SF for the inclusion of vulnerable groups, including Roma.

Mr. Ranguelov argued that in relation to SF, we need to make further progress in using good practices and in achieving a shared management in the execution of SF. The latter is excessively national and tends to overlook the need to share common goals, hence the importance of the transnational level. Exchanging experiences is also useful when we are doing policymaking. In the context of fiscal and budgetary restrictions in EU countries, sharing good practice will achieve a more effective use of limited resources. SF are not just financial resources, as they help to streamline policy decisions and achieve complementarity between what we already do at country level and what can be done through transnational actions. There are 13 networks funded by the European Commission (EC) and similar to this one, addressing different topics to reinforce transnational cooperation.

Mr. Ranguelov then suggested that we need to look at how national policies can be integrated into EU common goals, in particular social inclusion policies. There is no time to continue with experimentation alone, and we rather need to reuse experiences from other countries, through an open approach. This does not signify a simple ‘copy and paste’ of successful programmes, and we need to take into account local conditions, but through transnational networks such as *EURoma* and this new Network we have the capacity to innovate better together.



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He insisted on the need to convince citizens of the added value of EU funds, for instance through the institutional support of Managing Authorities and other state agencies. Expenditures is not a sufficient indicator, and we need to assess and measure the impact of each individual measure. Performance is key, but not merely with respect to the EC. Reporting to EC is key, but also to citizens in order to demonstrate accountability and transparency. Mr Rangelov concluded by praising EURoma's recently published Guide on the planning process of SF as a means to do better policymaking, and from which both the Commission and Member States can learn.

Marta García Rodríguez (Spanish ESF Managing Authority) then undertook the presentation of the *EURoma +* network, including its context, objectives and expected results. She began by asking why we are all here, what our expectations for this project are, and what this new network can do for MAs and National Contact Points. Ms. García explained the main objective, rationale, specific objectives, operational structure, duration, foreseen activities and budget of the project. She highlighted the specific objectives of the network, which are to increase the political commitment by involving decision-makers to support the MS planning process of PAs and OPs, and to foster mutual learning in this process. See PPT attached.

The presentation of the project by Ms. García Rodríguez was followed by a description of the meeting's agenda by **Carolina Fernández** (Technical Secretariat). Ms Fernández explained that the morning session would focus, on one side, on the lessons learned in the current programming period, and on the other side, on the planning process for the next programming period, while the afternoon session would focus on how the foreseen actions can better serve to achieve the project's goals. As a basis for subsequent debates, she analysed the progress made to date as well as the shortfalls in achieving an effective use of SF for Roma inclusion, describing the main findings of the EURoma network. See PPT attached.

Session 1: Lessons learned from the current programming period 2007-2013

MS representatives made an assessment, based on a questionnaire previously sent to participants, of the use of SF for Roma inclusion to this date in their own country, analysing shortcomings and obstacles, describing their managing models, priorities and implementation mechanisms, as well as the results and impact of programmes explicitly targeting Roma.

The round of interventions highlighted the substantial progress made in the current programming period, as all MS have increased SF resources for measures explicitly promoting Roma inclusion, increasing the number of projects and beneficiaries, and achieving results.

There is no single managing model or implementation mechanism across the EU, but rather a combination of systems and approaches among different countries, adapted to different national and local circumstances. In some MS, Roma inclusion needs are tackled through different OPS: as mainstream social inclusion measures, including specific axes targeting Roma explicitly, or as part of programmes/measures aimed at vulnerable communities and groups. Some MS have developed specific OPS, measures and actions for Roma, or a territorial approach focusing on areas where Roma are concentrated. In fact, there is no single 'right' approach, and it was observed that a combination of mainstream and targeted interventions may be the most appropriate approach to Roma inclusion through SF.



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Furthermore, a trend towards more interconnected and comprehensive measures targeting the multidimensionality of Roma exclusion and poverty is taking place, as well as the development of complementary actions in different fields and with different EU funds. Improvements have taken place in relation to institutional coordination mechanisms both vertically and horizontally.

Participants highlighted a series of obstacles and lessons learned in four areas, specifically in:

1. Policy approach. Several participants emphasised the fragmentation of policies in most countries, both at horizontal and vertical levels.
2. Management system. Participants underlined the need for integrated operations, for a partnership approach involving more actors, for long-term approach, and for the complementarity of projects.
3. Implementation mechanisms. Participants highlighted the need for a simplification of cost options, for the adaptation of measures to different circumstances, and to resolve the delays affecting the initiation of the projects' implementation.
4. Specific issues and problems related to gathering information and collecting ethnic data for evaluation and monitoring purposes. The scarcity of indicators and limited ethnic data collection in many MS add to the difficulty of reporting on results. Hence the importance of transferring knowledge among MS.

The first session of debates was followed by the intervention of **László Andor (European Commissioner for Employment, Social Affairs and Inclusion)**. Mr. Andor began by emphasising that the importance of the work of the EURoma + learning network goes well beyond the seemingly technical character of best practice exchange. Its work will help to overcome the paradox between the need to achieve progress, and the weak use of EU resources for Roma inclusion in many MS. EURoma + thus offers an opportunity to better design, implement and monitor effective interventions.

Mr. Andor emphasised the need for constant feedback mechanisms. In this light, he welcomed the participation of 8 Member States and expressed the EC's appreciation for Spain's coordination of the network. Highlighting the fact that more than 80% of Roma in the EU are in situations of poverty, that over half of these live in substandard housing, and that the economic crisis gripping Europe has caused a worsening of social conditions, Mr. Andor stressed that we cannot miss the key opportunity to invest in Roma inclusion to successfully tackle Europe's demographic and economic challenges, as Roma constitute a growing share of the EU's student body and hence of the future workforce. The expertise of participants in EURoma + is important in the ongoing process of preparing the PAs and the related OPs for 2014-2020, and offers an opportunity to better design effective interventions and to allocate the necessary financial resources for improving the living conditions of Roma people across Europe.

Mr. Andor declared that the EC is acutely focused on the effective implementation of NRIS, and insisted on the fact that political commitment is needed at all levels to ensure investment achieves the best possible results. He stated that, in relation to Roma inclusion issues, the EC focuses primarily on exchange and upscale of best practices, but is not limited to it. He emphasised that EU adds value and has a key role to play in 3 respects: coordination at policy level to increase the efficiency of national policies; EU funding mobilised alongside national budgets to translate strategies into real socio-economic integration; and in enforcing antidiscrimination legislation.



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Mr. Andor focused on the first two aspects: he praised the emergence of a strong EU framework for NRIS. He mentioned that the nomination of National Roma Contact Points (NRCs) is an important first step in the colossal work aiming to reduce the gap between Roma and the rest of society. All MS endorse the goals of the EU Framework, but measures proposed in healthcare and housing are far less developed than in employment and education. Key weaknesses identified by the EC include the lack of an integrated approach across policy areas in many NRIS. In many cases, there is no precise action plan with specific measures commensurate with the challenges on the ground, with clearly earmarked sufficient funding (from EU and national sources), with an implementation mechanism specifying the roles of all stakeholders and a robust national monitoring. Mr. Andor stressed the difficulties in preparing and implementing integrated interventions.

In order to implement provisions on the ground, strong and regular dialogue between EC and MS is taking place – including bilateral dialogue between Bulgaria, Hungary, Romania, France and Italy – to assess the NRIS and appropriate measures. A series of regular meetings of the network of NCPs in all EU MS are also being held to exchange best practices and peer review the implementation of the NRIS.

The EC also monitors MS efforts in relation to Roma inclusion within the framework of the Europe 2020 Strategy and of the European Semester. Within the framework of the European Semester in 2012 the EC paid special attention to Roma inclusion in the Country Specific Recommendations for those countries where the size of this minority group is significant. The EC published its assessment of the NRIS last year, and the EC will soon adopt a progress report on the implementation of the NRIS with a view to enhancing the effectiveness of measures aimed at Roma inclusion, and to provide additional support and guidance to MS to achieve tangible results on the ground. Jointly with the 2013 progress report, the Commission will put forward a proposal for a Council Recommendation to enhance the effectiveness of measures to achieve Roma integration. The proposal has been fed by the work done within the network of the NRCs.

Mr. Andor stressed that in order to achieve results on the ground we need budgetary allocations from national and EU resources to express political commitment. Stronger and more systematic involvement of NRCs alongside with MAs will produce improvements.

For the period 2014-2020 the Commission has proposed a specific investment priority to be devoted to the integration of marginalised communities, such as Roma. Related to that, a dedicated ex-ante conditionality was proposed to ensure that EU support is part and parcel of a comprehensive Roma inclusion strategy. The EC has defended a specific investment priority for marginalised communities including Roma as part of comprehensive NRIS, the earmarking of 25% of Cohesion policy resources for the ESF, and 20% of the latter for Social Inclusion purposes. This may not seem much but compared with the current situation, it would imply significant progress especially in countries with large Roma populations. Several positive policy actions have already been developed and should be more widespread for example, Roma children's participation in mainstream ECEC, personalised employment services and training programmes to promote Roma access to the labour market, or Roma health, school or labour mediators.



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Among the existing obstacles to an effective use of SF for Roma inclusion, Mr Andor highlighted the provision of co-financing for punctual, unsustainable projects, insufficient administrative capacity and knowhow on part of civil society actors and local administrations, and the lack of a systematic evaluation of the acquired experience.

He welcomed the efforts of the Coalition of International Organisations for Roma inclusion involving the EC, World Bank, UNDP, as well as the initiative of the Open Society Institute to help local authorities improve their access to EU funds, and called on MAs to be involved in these initiatives and to support these efforts in their respective countries.

Mr. Andor concluded by stating that SF is EU's main instrument to contribute to achieving Europe 2020 goals. These goals will not be achieved without investments in Roma inclusion (eg. ESF labour market integration, fighting early school leaving, improving access to public services, ERDF for infrastructure, including social infrastructure). The ESF has a key role to play in Roma inclusion efforts in the context of tight budgets.

In the following session, **Gábor Tóth** (European Commission, Unit E1: ESF Policy and Legislation, DGEMPL) analysed the state of play of negotiations on Common Strategic Framework (CSF) Regulations. He addressed three elements in the negotiation process, offering an overview of the schedule of the planning process of next CSF's PAs and OPs, the negotiation on CSF regulations and the informal dialogue, before analysing the content – main provisions – of the Common Provisions and ESF regulation.

Mr Tóth described the timing of the PAs and OPs planning process: MS's PAs should be adopted by the end of 2013 and OPs by the middle of 2014. This presupposes the adoption of the CSF by the Council in Autumn, and EP's approval in July. He stated that this ambitious timing is conditional on various factors. In relation to the negotiation on regulations, trilogues are currently taking place: the thematic blocks - related to eligibility, priorities, etc. – have already been negotiated and agreed upon; the funds regulations, including ESF, are ongoing; political trilogues are still ongoing on issues on which no agreement has yet been reached. In relation to the informal dialogue, Commission position papers were provided to MS in October and November 2012, leading to 1-2 informal dialogue meetings with each MS to discuss informal draft PAs. Bulgaria has already formally submitted its PA.

In relation to the main provisions of the Common Provisions and ESF regulation, Mr Tóth focused both on issues of quantity and quality currently promoted by the EC and debated by the Council and Parliament: in relation to quantity, more funding for investment into people and employment and social policy reforms, with an ESF minimum share; more funding on social inclusion with 20% earmarking of the ESF budget for this purpose, and a specific investment priority "Comprehensive socio-economic integration of marginalised communities such as the Roma". With regard to quality, the main provisions focus on the development of effective partnerships, on improving the access to funds, and on the development of integrated approaches to address the specific needs of target groups at highest risk of exclusion by all relevant EU funds. See PPT attached.



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Session2: Preparation of the next programming period (negotiation of Partnership Agreements and design of Operational Programmes)

This session, focused on how to make PAs and OPs more inclusive with Roma, was introduced by **Carolina Fernández**. Ms. Fernández stressed that the decisions taken now have implications for the coming decade and, referring to the schedule established by the EC for the planning of OPs, she argued that there is still some time to revise PAs and OPs to be more inclusive of Roma and to develop explicit lines of action and financing. She reflected on the lessons learned in the current programming period: now the challenge is to put into practice a territorial, integrated approach and to develop a reliable indicator's system for monitoring purposes. She mentioned the ways that the network can support MAs and NRCPs to address these challenges.

Participants subsequently analysed the current state of play of the national programming/negotiation processes; the ways in which the experience of the current period has informed the design of PCs and OPs; the degree of alignment with NRIS; and how certain topics and issues related to Roma are addressed. They identified different obstacles in relation to the policy approach, management, implementation, and other specific issues.

Some participants emphasised how specific targeted groups – whether Roma or vulnerable groups – must be explicitly referred to in PAs and OPs. But what is most important is to have a clear idea of how the measures are going to be unfolded. 'How' is key, not merely 'what' in the development of policies. In many cases, there is no clear intervention logic, no clear focus of measures, no clear lines of action. More details are thus needed on the measures foreseen by MS for Roma inclusion. There is no right approach but social inclusion measures need elaboration and justification (why select such and such options). The example of measures related to improving Roma access to public services was mentioned – does it mean more people in municipal services to deal with Roma? and how can this be justified for non-Roma service users? Some participants underlined the need to avoid an administrative-type approach; there is no need for many measures necessarily, but the measures must benefit the broadest possible number of vulnerable people.

This led to a discussion of data collection for monitoring and evaluation purposes, and of possible methodologies to be used to measure the share of Roma among beneficiaries of SF programmes.

José Manuel Fresno, as part of the Technical Secretariat, summed up the main topics from the morning sessions, highlighting the following key ideas:

- Firstly, in relation to the reference to Roma in PAs. Now, of course Roma are mentioned in almost all PAs. This constitutes important progress, because only one country referred to Roma in 2000. But we cannot limit ourselves to a reference. MS must detail the kinds of measures foreseen and how they will be developed.
- Secondly, with regard to different investment priorities and entry points. It is possible to tackle Roma needs from different objectives and investment priorities in mainstream programmes – by dealing with social inclusion issues MS will deal with Roma needs or by developing specific measures for Roma. The key question is: how do we guarantee that Roma will be effectively tackled in programmes? This implies addressing issues of disaggregated, ethnic data collection.



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- Thirdly, concerning the combination of funds, for instance for integrated operations. Stakeholders are looking for synergies between different funds, but it is not easy to make progress on multi-fund programmes due in part to technicalities.
- Fourthly, in regard of integrated operations. There are different ways to follow an integrated approach. For some MS, this is mainly based on a territorial approach, when Roma are concentrated in specific areas. In other cases, the focus is to tackle housing issues – there is an opportunity under ERDF regulation but little has been done about using the opportunity of integrated operations based on housing. The approach must be more holistic to work with communities, and in this light, thematic concentration and integrated approach are key to achieve results on the ground.
- Fifth, in relation to National Roma Contact Points, there are different options and situations. In some countries the information provided is that the NRCP is consulted in the development of the PA and OPs. However, this only constitutes one step in cooperation processes. In other countries, manifest progress is taking place towards coordination, which moves towards bridging policies with economic resources and tools. Participation of NRCP in policy design is uneven in different countries.

Mr Fresno emphasised that we are in a key moment in the conception and the planning process of the next programming period. Policy decisions and political commitment are crucial to achieve an appropriate connection between the NRIS (policy tool) and the SF (financial tool). However, it is not only matter of willingness; it also requires a proper understanding of the subject, through shared analysis and diagnosis, and the creation of appropriate conditions for actions. He insisted on the need to take stock of previous lessons and to incorporate them in the planning process of the PAs and OPs. There is a need for support in this process and EURoma + can contribute to provide this support. However, we need to demonstrate impact through development of indicators, thematic concentration and integrated approach. He concluded by underlining the need to make use of existing EU legal (anti-discrimination legislation), financial (SF) and policy (Europe 2020 Strategy, NRIS) instruments to achieve progress on the ground.

Session 3: Next steps. Discussion on how the foreseen actions can better serve for achieving project's goals

Thereafter, Mr. Fresno initiated the afternoon session by detailing the next steps of the EURoma + network, and on how the foreseen actions can better serve to achieve the project's goals. The PowerPoint with the presentation detailing objectives, foreseen actions and methodology is attached.



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Summary of the presentation:

Activities	Outcomes
First Steering Group Meeting (2013)	<ul style="list-style-type: none"> • Current situation from the participant countries is updated • Political commitment to achieve the project's goals is demonstrated
Country-by-country meetings (2013)	<ul style="list-style-type: none"> • Lessons learned during the current programming period are identified • Joint report providing proposals based on the elements that have proved to be successful
2/3 Transnational mutual learning workshops	<ul style="list-style-type: none"> • Key topics related to Roma policies and SF are addressed • Existing experiences are shared and tested, and mutual learning is facilitated
Second Steering Group Meeting (2014)	<ul style="list-style-type: none"> • Assessment of the impact of the project (analysis of PAs and OPs and the extent to which EURoma + proposals have been incorporated)

Main ideas for the coming activities:

1. Country-by-country meetings:

Aim of the meetings

- To draft a baseline analysis regarding the SF planning process in each of the participating countries.
- To deepen the discussion on the subjects addressed at the launch event (explicit but not exclusive, national-local, integrated approach, partnerships, alignment between policies and funds, Roma involvement, evaluation mechanisms).
- To understand the Roma issues as regards the use of the SF, adjust and concretise EU principles and messages.

Working method

- A working guide (template) will be provided in order to harmonize the country meetings contents so as to compare final results.

Participants' profile (limited to the hosting country)

- Key players in the SF planning and implementation and in the Roma policies (a small group of participants)
- The Technical Secretariat will also participate in the meeting in order to draft the report.
- Suggested number of participants: between 5 or 6 stakeholders from ESF, ERDF, NRCP, and other relevant actors.

Expected output

- Joint report based on country by country meetings. The report will include:



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- An analysis of the main advances as well as existing difficulties and how they are addressed
- The state-of-play in each country, including the key areas which should be addressed, and the types of actions which could be undertaken to improve the situation.
- Proposals and recommendations based on mutual learning

Calendar

- Second part of 2013 (between September-November)

2. 2-3 Transnational mutual learning workshops

Objective

- To discuss in more depth key areas in which further efforts are needed and where exchange of information and mutual learning between Member States could be beneficial.

Potential topics

- The concrete topics will be identified and selected according to the baseline analysis.

Working method

- A handbook will be prepared for each seminar
- Plenary sessions and discussions in small groups to facilitate the exchange of information and mutual learning

Participants

- Medium-level officials from the ESF and ERDF MA representing the Heads of Unit
- National Contact Points for Roma Integration
- Representatives from the authority in charge of the NRCP as well as representatives from the key ministerial departments (mainly education, employment, housing, health care and social services)
- Different DGs from the Commission, notably DG Employment, DG Justice, DG Education, DG Agriculture and DG Regional Policy
- Technical Secretariat.
- Other relevant stakeholders may be invited.

Expected outcomes

- To facilitate mutual learning through encouraging transnational cooperation
- Reflecting and discussing on the specific topics –current experiences, challenges faced, possible solutions, etc
- Exploring and testing of each other's' ideas, experiences, practices and strategies.

Location

- To be held in one of the country of the Network partners (Slovakia kindly offered to host one of the workshops)

Calendar

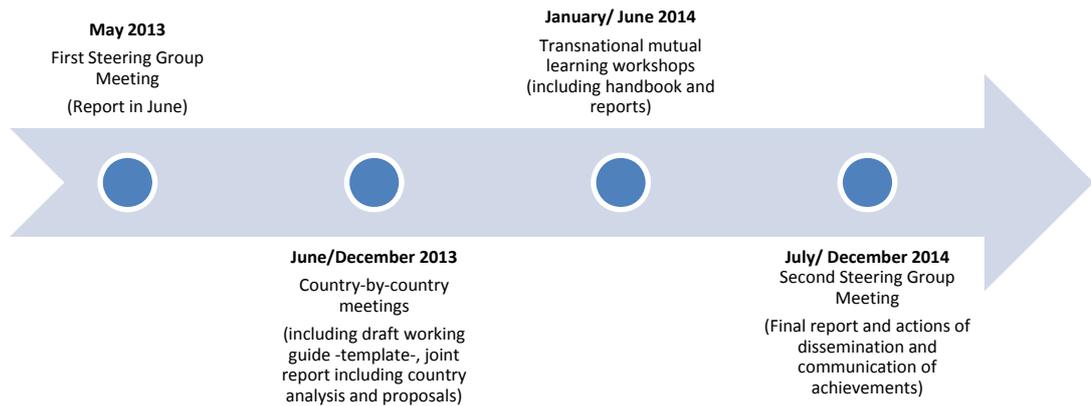
- First part of 2014



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Calendar of project's activities



Participants agreed on the objectives and working methods to elaborate the country-by-country baseline analysis, as well as the Transnational Mutual Learning Workshops (profile of participants and working method) and materials to be produced by the Network.