

## Report

### Seminar “Social Inclusion: Notions, Indicators, Requirements and Measurement”

The seminar brought together NBS, line ministries, academia, think tanks and other UN agencies. The objectives of the seminar were:

- to discuss the concepts of social inclusion and linkages between social inclusion, human development, the rights-based approach to social issues, and the “poverty reduction” approach;
- to increase the understanding and awareness of the links between the UN and EU frameworks for addressing inequality, poverty and social exclusion in a multi-national context (i.e. the MDGs and the EU Social Inclusion Process)
- to provide opportunity to exchange good practices and lessons learnt by other countries in the areas of:
  1. social exclusion measurements;
  2. social inclusion policy development;
  3. targeted vulnerable groups measurement

#### **Social inclusion concept and policy development:**

- Social inclusion is a relatively new concept that has been most actively elaborated and applied by members of the European Union. The EC defines social inclusion as “a process which ensures that those at risk of poverty and social exclusion gain the opportunities and resources necessary to participate fully in economic, social and cultural life and to enjoy a standard of living and well-being that is considered normal in the society in which they live.”
- Social inclusion recognizes explicitly the interdependence of sustainable economic growth and social policy which promotes the active participation of all members of society.
- The State has a responsibility to act to achieve the above rights by implementing policies which address active and/or passive barriers to full participation in society by all of its members who so desire. Many aspects of this obligation to act are delineated in the international Human Rights conventions. The State also has a vested interest, both political and economic, in ensuring the stability and cohesiveness of society and with it the sustainability of economic growth through the effective inclusion of all of its members.
- Social inclusion is a useful framework to address inequalities and social exclusion, and it is consistent with core mandates of poverty reduction, human development and the human rights-based approach. It is in fact complementary, as it is rights-focused with a socio-economic component.
- An advantage of the concept of social exclusion and conversely, inclusion over an approach based on poverty and other material deprivation is its focus on processes, i.e. the dynamics of the interaction between an individual and his or her social, legal, and economic environment. However, it was discussed that the complexity of the concept makes it difficult to measuring it.
- Social exclusion analysis needs to identify any barriers to equal participation in mainstream society. These barriers can be institutional (discrimination, lack of infrastructure or absence of services, or in the case of people with disabilities, can also be the physical accessibility of buildings or schools), in the community (prejudice, marginalization), or personal (lack of education, withdrawal, rejection, or fears).
- Different population groups may experience different and overlapping vulnerabilities or face different barriers and different strategies may be needed to overcome them. It was further recognised that legal frameworks often unintentional do not take into account differential impacts on different groups.

- The EU policy framework provides standards, common guidelines and a monitoring framework that can guide national policy development on social inclusion.
- The NDS already incorporates many aspects of social exclusion, however further analytical work needs to be done to better understand social exclusion dynamics and to refine and improve policy measures that promote inclusion.

### **Social inclusion measurements:**

#### European Survey on Incomes and Living Conditions (EU-SILC) and EU Laeken indicators:

- The Romanian experience illustrated that a gradual introduction of the EU poverty and exclusion indicators is necessary. Methodological difficulties with annual income and non-response have been discussed.
- In countries where the income based poverty rate may not reflect the true situation, expenditure based measures should continue to be produced. Both absolute and relative poverty rates should be produced and interpreted.
- The Romanian experience showed that the selection/choice of indicators that are relevant to the country context should be done by a working group or commission consisting of academia, think tanks and statistical office.
- In Romania, administrative data sources have regained importance for calculating social inclusion indicators and the law on statistics with regard to disaggregations has been reviewed.

#### European Quality of Life (QoL) survey - Croatia:

- Social exclusion analysis requires using both objective and subjective indicators, which need to be compared
- Regional disparities are a major source of exclusion and need to be taken into account when defining indicators and analytical approaches.
- Multiple deprivation: the Croatian research has used an aggregate share of multiple deprivation to measure the percentage of the population that faces exclusion (i.e. those individuals that face exclusion in three dimensions: income, social participation and employment)
- Index of alienation: the Croatian research has used an aggregate index to measure the relationship between the individual and society
- Social fragmentation/cohesion: the Croatian research has also looked at the levels of social cohesion and trust between members of society

#### Multiple deprivation – Macedonia and Moldova:

- The Macedonian experience illustrates the sensitivity of the choice of indicators/dimensions for the calculation of a multiple deprivation index/indicator
- The Macedonian experience also provides new approaches to combining individual deprivation with household deprivation to measure new forms of exclusion.
- The Moldovan experience shows that existing statistics on objective and subjective poverty and deprivation index for rural areas are already being used for policy design and decisions (i.e. regional development plans, social investment fund) and they can provide a basis for future social exclusion statistics.

#### Local level indicators – Poland:

- The Polish experience illustrated that a fine balance needs to be struck between the number of indicators needed for policy monitoring and the number of indicators needed for research
- Decentralisation in Poland has created demand for social inclusion indicators by local governments
- Social inclusion statistics at local level make use of various data sources (administrative, surveys, etc.)
- Peer comparison of performance between *gmina*