

Policy Analysis Laboratory

The Future of the Welfare State in the Western Balkans

AGENDA

Montenegro, Bečići ([Hotel Iberostar](#)), October 21-25, 2019

October 21, 2019

Arrival of the participants...

15.00-17.00 Welcome notes, introductions and initial discussion

- *Paul Stubbs*, Representative of the Network *The Future of the Welfare State in the Western Balkans*
- *Ljiljana Simović*, Assistant Minister, Ministry of Labour and Social Welfare, Government of Montenegro
- *Tanja Mišćević*, Deputy Secretary General, Regional Cooperation Council
- *Christiane Westphal*, Policy Officer, European Commission – DG Employment, Social Affairs and Inclusion (EMPL)
- *Bojan Ladjevac*, Project Coordinator, Friedrich Ebert Stiftung for Serbia and Montenegro
- *Michaela Bauer*, UNICEF Deputy Representative in Montenegro, Co-Chair UN Social Inclusion Results Group – speaking on behalf of UNDP and UNICEF

17.00-17.30 Break

17.30-19.00 Keynote speaker lecture

- *Jamie Bolling*, director, Independent Living Institute (Sweden)

Moderator: *Maja Gerovska Mitev*, Faculty of Philosophy, Skopje

19.30 Dinner and free time

October 22, 2019

9.30-11.00 Work in three parallel streams of the Policy Analysis Laboratory School

Stream 1: Financing Welfare State

Session 1: Three worlds of welfare regimes – expenditures and revenues

Topics: Expenditures for social protection and education; Who pays for welfare? Public and private expenditures; Government role – from tax collection to nudge; Sources of revenues – social contributions versus taxes; Future challenges.

Stream Leader: *Gordana Matković*, Center for Social Policy, Belgrade

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Stream 2: Inequality and Social Mobility

Session 1: Introduction: conceptual and methodological issues

Topics: Long-term social and political implications of high and persistent inequalities and weak social mobility.

Stream Leaders: *Nermin Oruč*, Center for Development Evaluation and Social Science Research, Sarajevo

Guests: *Slobodan Cvejić*, Faculty of Philosophy, Belgrade / SECONS; *Christiane Westphal*, European Commission, DG EMPL

Stream 3: Community-Based Services

Session 1: Introductions and Principles of Independent Living

Topics: Independent living; Defining Community-based Services; Regional trends and challenges in the availability of community-based services.

Stream Leaders: *Paul Stubbs*, The Institute of Economics, Zagreb and *Maja Gerovska Mitev*, Faculty of Philosophy, Skopje

Guest: *Jamie Bolling*, director, Independent Living Institute (Sweden)

11.00-11.30 Break

11.30-13.00 Work in three parallel streams of the Policy Analysis Laboratory School

Stream 1: Financing the Welfare State

Session 2: Discussion – Financing welfare states in the Western Balkans – unintended mix

Topics: Expenditures and revenues – cases of Croatia, Serbia, North Macedonia and B&H based on Eurostat data ([spr_rec_gdp] [spr_exp_sum]); Prevailing financing schemes by sectors – exercise; Scope for reforms?

Stream Leader: *Gordana Matković*, Center for Social Policy, Belgrade

Guests: *Vladimir Dimkovski*, Health Fund of the North Macedonia; *Nikolina Obradović*, Assistant Professor, University of Mostar, Bosnia and Herzegovina

Stream 2: Inequality and Social Mobility

Session 2: Indicators for measuring indicators and social mobility

Topics: Overview of available databases and how to calculate various indicators of inequality and social mobility.

Stream Leader: *Nermin Oruč*, Center for Development Evaluation and Social Science Research, Sarajevo

Guests: *Slobodan Cvejić*, Faculty of Philosophy, Belgrade / SECONS

Stream 3: Community-Based Services

Session 2: Putting users at the centre of services

Topics: Social Inclusion principles; Voice and User-centred services; Challenges of user participation in the region.

Stream Leaders: *Paul Stubbs*, The Institute of Economics, Zagreb and *Maja Gerovska Mitev*, Faculty of Philosophy, Skopje

Guests: *Ben Perks*, UNICEF (video); *Christiane Westphal*, European Commission, DG EMPL

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13.00-15.00 Lunch break

15.00-17.00 Pannel Discussion: Is Universal Basic Income a solution for welfare state challenges?

Moderator: Žarko Šunderić, Center for Social Policy, Belgrade

Participants:

- *Paul Stubbs*, The Institute of Economics, Zagreb
- *Biljana Mladenović*, Social Inclusion and Poverty Reduction Unit, Government of Serbia
- *Jamele Rigolini*, World Bank, Western Balkans – Human Development, Lead Economist and Program Leader (*via skype*)
- *Gordana Matković*, Center for Social Policy, Belgrade

18.30 Dinner

October 23, 2019

9.30-11.00 Work in three parallel streams of the Policy Analysis Laboratory School

Stream 1: Financing the Welfare State

Session 3: Financing the Welfare State and the Politics of Taxation

Topics: Progressivity of contributions and different types of direct and indirect taxes; Policies of taxation and their redistributive impact

Stream Leader: *Blagica Petreski*, Finance Think, Skopje

Guests: *Dušan Tomšić*, Ministry of Labour and Social Policy, North Macedonia; *Aida Gjika*, Faculty of Economy, University of Tirana; *Christiane Westphal*, European Commission, DG EMPL

Stream 2: Inequality and Social Mobility

Session 3: Main drivers of inequalities and barriers to social mobility in the Western Balkans

Topics: Focus on education and labour market policies and skills gaps

Stream Leader: *Nermin Oruč*, Center for Development Evaluation and Social Science Research, Sarajevo

Guests: *Jeton Mehmeti*, GAP Institute, Pristina; *Cristina Mereuta*, European Training Foundation

Stream 3: Community-Based Services

Session 3: Financing and Monitoring Community-based Services

Stream Leaders: *Paul Stubbs*, The Institute of Economics, Zagreb and *Maja Gerovska Mitev*, Faculty of Philosophy, Skopje

Guest: *Gordana Matković*, Center for Social Policy, Belgrade; *Elira Jorgoni*, Economic and Social Analytics, Tirana

11.00-11.30 Break

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11.30-13.00 Work in three parallel streams of the Policy Analysis Laboratory School

Stream 1: Financing Welfare State

Session 4: Quest for efficiency – framework for analysis of government policies

Topics: Cost benefit analysis on the policy for third child in North Macedonia; Reform of means tested social assistance program in Albania; Justification of maternity and parental benefit reform in Serbia

Stream Leader: *Gordana Matković*, Center for Social Policy, Belgrade

Guest: *Sabina Ymeri*, Economic and Social Analytics, Tirana; *Blagica Petreski*, Finance Think, Skopje; *Katarina Stanić*, Center for Social Policy, Belgrade

Stream 2: Inequality and Social Mobility

Session 4: Small Group Work

Topics: Identification of different social, political, financial, policy related, and institutional mechanisms contributing to specific inequality and mobility issues.

Stream Leader: *Nermin Oruč*, Center for Development Evaluation and Social Science Research, Sarajevo

Stream 3: Community-Based Services

Session 4: Small Group Work

Topics: Conceptualising and realising community-based services; Avoiding regional inequalities in access; the role of non-state actors.

Stream Leaders: *Paul Stubbs*, The Institute of Economics, Zagreb and *Maja Gerovska Mitev*, Faculty of Philosophy, Skopje

13.00-15.00 Lunch break

15.00-17.00 Panel Discussion: Future Options for the Welfare States in the Western Balkans

Moderator: *Nermin Oruč*, Center for Development Evaluation and Social Science Research, Sarajevo

Participants:

- *Suzana Ahmeti*, UNDP North Macedonia
- *Mirna Jusić*, Analitika, Sarajevo
- *Jeton Mehmeti*, GAP Institute, Pristina
- *Žarko Šunderić*, Center for Social Policy, Belgrade

18.30 Dinner

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October 24, 2019

9.30-11.00 Work in three parallel streams of the Policy Analysis Laboratory School**Stream 1: Financing Welfare State****Session 5: Financing preschool education and child care services**

Topics: Role of the state in financing; Central versus local mandate; User fee services – how much is appropriate; Public – private partnership?; Case study: Formula-based grant to municipalities – the case of Albania

Stream Leader: *Sabina Ymeri*, Economic and Social Analytics, Tirana

Guests: *Katarina Stanić*, Center for Social Policy, Belgrade; *Nikolina Obradović*, Assistant Professor, University of Mostar, Bosnia and Herzegovina; *Elton Stafa*, NALAS, Albania

Stream 2: Inequality and Social Mobility**Session 5: Barriers and Opportunities**

Topics: Systematic integration of key barriers and opportunities for improvement of equity and social mobility in Western Balkan countries.

Stream Leader: *Nermin Oruč*, Center for Development Evaluation and Social Science Research, Sarajevo

Guest: *Elira Jorgoni*, Economic and Social Analytics, Tirana

Stream 3: Community-Based Services**Session 5: From Institution-based to Community-based services**

Topics: The why, what and how of deinstitutionalization; Innovation in community-based services; Dealing with unintended consequences of deinstitutionalization.

Stream Leaders: *Paul Stubbs*, The Institute of Economics, Zagreb and *Maja Gerovska Mitev*, Faculty of Philosophy, Skopje

11.00-11.30 Break**11.30-13.00 Work in three parallel streams of the Policy Analysis Laboratory School****Stream 1: Financing the Welfare State****Session 6: Work on Plenary Presentation**

Topics: Formulation of recommendations for improvement of financing of the welfare state in Western Balkan countries; Work on Plenary Presentation; Evaluation of the Stream

Stream Leaders: *Sabina Ymeri*, Economic and Social Analytics, Tirana and *Blagica Petreski*, Finance Think, Skopje

Stream 2: Inequality and Social Mobility**Session 6: Work on Plenary Presentation**

Topics: Formulation of recommendations for improvement of equity and social mobility in Western Balkan countries; Work on Plenary Presentation; Evaluation of the Stream

Stream Leader: *Nermin Oruč*, Center for Development Evaluation and Social Science Research, Sarajevo

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Stream 3: Community-Based Services

Session 6: Work on Plenary Presentation

Topics: Formulation of recommendations for improvement of community-based services in Western Balkan countries; Work on Plenary Presentation; Evaluation of the Stream

Stream Leaders: *Paul Stubbs*, The Institute of Economics, Zagreb and *Maja Gerovska Mitev*, Faculty of Philosophy, Skopje

13.00-15.00 Lunch break

15.00-17.00 Presentations from streams, closing and evaluation

Moderator: *Maja Marković*, Juventas, Podgorica

19.00 Dinner

October 25, 2019

- Departures

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ABOUT POLICY ANALYSIS LABORATORY

Background

In 2017, a group of think-tank organizations and social policy researchers developed a Regional Research and Advocacy [Platform](#) focusing on the future of the welfare state in the countries of the Western Balkans (Albania, Bosnia-Herzegovina, Kosovo*¹, Montenegro, North Macedonia, and Serbia). The platform aims to raise awareness, promote discussion, and develop a common advocacy agenda for strengthening the welfare state at local, national and regional levels and ensuring that social policy challenges are given greater attention in the EU enlargement process.

In June 2018, a Regional Conference on the topic was held in Belgrade, Serbia attended by over 250 policy makers, professionals, activists, development actors, and researchers. The Conference will be held every two years, focusing on issues of mutual concern. In 2019, the priorities of the network are to develop indicators, undertake research, support peer review processes for Governments in the region, and to hold an intensive Policy Analysis Laboratory School.

The Policy Analysis Laboratory (PAL)

The PAL School is aimed at professionals working in the social sectors either as policy and decision makers, service providers, administrators, social partners, activists, advocates, think tank analysts, researchers or lecturers, as well as service users, from across the Western Balkan countries. Following a Call for Participants, up to 36 persons will be chosen as participants.

The main focus of the PAL will be intensive work in one of **three streams**:

1. Financing Welfare State
2. Inequality and Social Mobility
3. Community-based Services

Each stream, co-led by two experienced facilitators, will enable participants to:

- Familiarize themselves with data, indicators and trends in the Western Balkans and beyond;
- Gain important new skills in policy analysis and the promotion of evidence-based policies;
- Develop an advocacy platform and action plan for work that may be presented at the 2020 Conference or elsewhere.

Working methods of the streams will be hands-on and interactive through real world examples, scenario-building exercises and inputs from resource persons drawn from the region and beyond.

There will also be three keynote speakers, renowned experts on each of the three themes, discussing with participants in structured dialogues in evening plenary sessions, as well as Round Table Discussions on choices for the Welfare State in the Western Balkans and future challenges.

¹ This designation is without prejudice to positions on status, and is in line with UNSC 1244 and the ICJ Opinion on the Kosovo Declaration of Independence

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DESCRIPTION OF THE STREAMS

STREAM 1: Financing the Welfare State

Stream Leaders: *Gordana Matković*, Center for Social Policy, Belgrade, *Sabina Ymeri*, Economic and Social Analytics, Tirana and *Blagica Petreski*, Finance Think, Skopje

Economic and overall prosperity does not diminish the importance of social protection and the role of welfare state. The population aging, the transformed world of work and employment, the changed role of the family and the new social values increase the demand for social protection and impose more prominent role of the welfare state.

There are numerous challenges related to welfare state financing. The key challenges include issues of sustainability and equitable financing, pathways for improving efficiency (doing more with less), a combination of public and private financing, an optimal level of decentralization (national versus local financing), and mix of contributory and non-contributory mechanisms (social insurance and social assistance).

Focus of this stream will be primarily on the *past or planned reforms in the financing of welfare state, including prospective innovations*. Through a mix of brainstorming sessions and interactive discussions, case studies and theoretical presentations, participants will explore the following issues:

- Decentralization of social protection – what are the challenges and what works?
- Financing of preschool education – local versus national level, private versus public funds;
- Earmarked transfers for the financing of social care services – an attempt to overcome the disadvantages of decentralization;
- Privatization of pension insurance – should we follow the path of structural reforms?
- Extension of social security to workers in the informal economy – an attempt to reduce non-contributory financing of social security?
- Universal basic income – new ideas;
- Financing of healthcare – is there a justification for tax-financed healthcare in Western Balkans?

STREAM 2: Inequality and Social Mobility

Stream Leader: *Nermin Oruč*, Center for Development Evaluation and Social Science Research, Sarajevo

This stream is going to focus on different types of inequalities of life opportunities related to the socio-economic background in Western Balkan countries (e.g. inequalities of income and consumptions, inequalities in employment, access and quality of social services, inequalities in educational opportunities, gender inequalities, urban vs. rural gaps etc.).

The stream will start with conceptual and methodological issues and an overview of inequality trends in the Western Balkans and its main drivers. The first session will review available databases for analysis of inequality in the Western Balkans, their decompositions and visualizations from available datasets. It will have a specific focus on systematic review of indicators, data and trends in Western Balkan countries in terms of different inequalities.

The second stream session will be focused on identification on different social, political, financial, policy related, and institutional mechanisms contributing to creation and maintenance of inequalities through a supervised small-group work and an interactive discussion.

The third session will be focused on systematic integration of key conclusions from previous two sessions, identification of key barriers and opportunities for improvement of equity in Western Balkan countries as well as creation of a joint advocacy platform and action plan.

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The stream will use similarities and differences existing among Western Balkan countries as a platform for building better understanding of rising inequalities in the region as well as for building capacities of participants for analysis and formulation of policy proposals.

STREAM 3: Community-Based Services

Stream Leaders: *Paul Stubbs*, The Institute of Economics, Zagreb and *Maja Gerovska Mitev*, Faculty of Philosophy, Skopje

This stream will explore the principles behind, rationale for, and aspects of the delivery of community-based services, broadly defined as accessible services to individuals, groups, families and communities that seek to empower and enable the right to independent living as opposed to placement in restrictive, institutionalised, settings.

Across the Western Balkans, developing a range of community-based services has been a crucial element of reform processes aiming to transform institutions and contribute to deinstitutionalisation. Through a mix of interactive discussions, case studies and external resource persons, participants will explore:

- The right to inclusion and independent living;
- Working with users' strengths;
- Planning community-based services;
- Delivering holistic community-based services;
- Financing community-based services;
- User involvement, advocacy and leadership; and
- Inspection, monitoring and evaluation.

Whilst seeking to avoid an approach to community-based services that focuses on specific vulnerable groups, examples from practice for persons with disabilities, children at risk of abuse; and young people leaving institutional care will be used to illustrate the challenges involved.

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