



## **“SOCIAL INSTITUTIONS SUPPORT PROGRAMME”**

**SISP(2007)3SS4Rep**

### **3<sup>th</sup> REGIONAL SUMMER SCHOOL ON SOCIAL SECURITY 27 May- 08 June 2007**

Trogir, Croatia

The Third Regional Summer School on Social Security has been organised from 27 May to 8 June 2007 in Trogir, Croatia.

This event has provided in-depth social security training to 36 participants from the whole region in a comprehensive, multidisciplinary and multinational way.

The programme of the summer school has been composed to provide a general introduction into social protection from a legal, economic, sociological and administrative perspective. The training courses were dealing with social security in its broadest sense, including cash benefit schemes, pensions and health care systems. Throughout the courses, a strong comparative element has been present. By providing the different approaches to social security that co-exist within Europe, the school intended to enable the participants to understand better the general principles that shape social security. The programme also paid attention to the role of international bodies such as the European Union and the Council of Europe.

The staff of the programme during the summer school has been composed of social security professors from various European countries.

The Summer School consisted of four compulsory courses, two optional courses (out of which one had to be chosen by the participants), and two compulsory seminars. All subject matters were taught in English. The units dealt with:

- Basic principles of social security policy
- Social security comparison and social security systems in Europe
- International and European social security law
- Social security economics
- Social security management and IT
- Social protection philosophy

Two seminars integrated the various units around one or more central topics. One seminar

was dealing with the “*Co-ordination of social security systems in the Balkan*”, and the other with “*Converging social policies in the Balkan*” Participants were obliged to prepare a presentation on a certain topic. Participation and presentation by the participants has been evaluated by the tutors; and these evaluations were part of the general evaluation of the participants.

A certificate has been awarded to the participants who attended the classes and seminars on a regular basis; and a diploma has been handed over to those who passed the evaluations successfully.

## The programme of the edition 2007 of the Summer School

### TIME TABLE

#### 3th SUMMER SCHOOL ON SOCIAL SECURITY

| May       | 10.00-12.00         | 12.00-13.00                   | 14.00-16.00                       | 16.00-18.00         |
|-----------|---------------------|-------------------------------|-----------------------------------|---------------------|
| Sunday 27 |                     |                               |                                   | <b>OPENING</b>      |
| 28        | Unit 2              | Unit 1                        | Unit 1                            | Unit3               |
| 29        | Unit 1              | Unit 1                        | Unit 2                            |                     |
| 30        | Unit 3              | <i>Intro optional courses</i> | Intro seminar 2                   | Intro seminar 2     |
| 31        | Unit 4              | Unit 4                        |                                   |                     |
| June      |                     |                               |                                   |                     |
| 1         | Unit 4              | Unit 4                        | Intro seminar 1                   | Intro seminar 1     |
| 2         | <i>Unit 6</i>       | <i>Unit 6</i>                 | <i>Unit 6</i>                     |                     |
| Sunday 3  |                     |                               |                                   |                     |
| 4         | <i>Unit 5</i>       | <i>Unit 6</i>                 | Reporting seminar 1               | Reporting seminar 1 |
| 5         | <i>Unit 5</i>       | <i>Unit 5</i>                 | <i>Unit 5 (1h)</i>                |                     |
| 6         | Reporting seminar 2 | Reporting seminar 2           | Reporting seminar 2 (1h) + Unit 3 | Unit 3 (1h)         |
| 7         |                     |                               |                                   |                     |
| 8         | <b>MP-TEST</b>      |                               |                                   | <b>CLOSING</b>      |

**Unit 1:** Basic principles of social security policy (Prof. Jos Berghman)

**Unit 2:** Social security comparison and social security systems in Europe (Prof. Danny Pieters)

**Unit 3:** International and European social security law (Prof. Paul Schoukens)

**Unit 4:** Social security economics (Prof. Tine Stanovnik)

**OPTIONAL COURSES (one to be chosen)**

**Unit 5:** Social Security Management and IT (Steven Segaert)

**Unit 6:** Social protection philosophy (Prof. Gijs Vonk)

**SEMINAR 1** *Co-ordination of social security systems in the Balkan:* Prof. Grega Strban

**SEMINAR 2:** *Converging social policies in the Balkan:* Prof. Danny Pieters

**Course descriptions**

**Unit 1** *Basic principles of social security policy;* taught by prof. J. Berghman

The unit provides the participants with an introduction into the historic foundations of the social security systems and the common concepts used in social security language. It will give insight in possible techniques of social security provision and envisages creating a common discussion language for all participants.

The aim of the unit dealing with basic concepts is to make the participants understand the broader socio-political aims of social security instruments and to position the latter in their broader socio-economic setting. Main target of the unit is to provide the participants with insight into the multi-functionality of social security and in the multidisciplinary to approach this.

The unit on the basic techniques of social security deals with the following topics:

- the traditional approach to social security
- the search for basic determinants of social security developments (its origins and dissemination; typical national developments; evolution within countries)
- a typology of social security systems (basic techniques; types of benefits; social security systems)
- social security as an exponent of the industrial society; criticism of the traditional social security approach; coping with a changing context).

**Literature (provided in the reading materials):**

- J. BERGHMAN, “Basic concepts on social security in Europe”, 23p.
- J. BERGHMAN, “The resurgence of poverty and the struggle against exclusion: a new challenge for social security in Europe?”, *International social security review*, 1997, 2-21.

**Unit 2** *Social security comparison and social security systems in Europe*, taught by prof. D. Pieters

In this course the students will be initiated into the principles behind (European) social security systems. Its objective is to provide a brief outline of the concepts and principles as well as the options and techniques present in the structures and development of any social security system. The introduction into social security entails the chalking out of an abstract frame in which each concrete social security system can be put into perspective. In this way systems can be more easily compared with each other. The course will also enable to provide the participants with examples of social security schemes as to be found in Europe.

In this unit the following topics will be discussed:

- the concept of social security
- the legal sources of social security
- the administration of social security
- the personal scope of application of social security schemes
- the risks and benefits (in general; old age; survivorship; incapacity to work; unemployment; family; health care care, and need)
- the financing of social security
- legal protection and law enforcement in social security

*Literature* (provided in the reading materials):

- D. PIETERS, *Social security: an introduction to the basic principles*, Kluwer, 2006, 137p. (1-109)
- D. PIETERS, *Recent Trends in Social Security in Europe: difficulties and answers*, Instituut Sociaal Recht, Leuven, 2005, 20p.

**Unit 3** *International and European social security law*, taught by prof. P. Schoukens

The unit will make participants familiar with the legal concepts and reasoning of European social security law. Next to an introduction into the European Union, the Council of Europe and the ILO, their instruments and institutions, the unit will mainly focus upon the process of European integration and the consequences this may have for the national social security systems. The competencies that the Council of Europe, the ILO and the EU hold in the sphere of social security, as well as all relevant instruments of social security law will be examined here. All relevant European legislation on social security will be covered in the fields of both harmonisation and co-ordination. More precisely will be covered the standard setting conventions and social right conventions of the Council of Europe and the ILO, and in relation to the European Union, the social protection rules in the primary EU law, the directives on equal treatment of men and women in social security, the convergence recommendations and the technique of open method of co-ordination monitoring the debate on social exclusion and the modernisation of social protection. The unit will deal with question whether the ongoing process of integration requires (or not) further steps in the harmonisation of social security. Finally the unit will introduce briefly the basic co-ordination principles which are present across the various international and European social security instruments.

Literature (*provided in the reading materials*)

- J. NICKLESS, *European Code of Social Security – Short Guide*, Strasbourg, Council of Europe, 2002, 137p. (9-49)
- S. VANSTEENKISTE and P. SCHOUKENS, *European Community competencies in the field of social security*, Reading Materials Master Programme Social Security and Europe, Instituut Sociaal Recht, Leuven, 2003-2004, 42-69.
- J. NICKLESS, *Equal treatment of men and women in social security*, Reading Materials Master Programme Social Security and Europe, Instituut Sociaal Recht, Leuven, 2000, 165-191.
- Legal materials

**Unit 4** *Social security economics*, taught by prof. T. Stanovnik

This course has an introductory nature and is designed to give the participants a common, basic understanding of the way economics look at the phenomenon of social security. It analyses the relationship between economic policy and social security. More precisely, it will apply some general economic theories upon the social security area. The economic effects of social state interventions are examined as well as some key notions of the theory of consumer behaviour and the welfare economy. The effects of income transfers and services upon individual behaviour also included as well as some discussion on the balance between efficiency and equity. Capita selecta may be added in accordance with actuality.

*Literature* (provided in the reading materials)

- N. BARR; Economics of the welfare state, Oxford University Press, edition 2004.

Chapter 5: Economic theory 2: Insurance (page 102 to 120);

Chapter 9: Consumption smoothing: Old-age pensions (page 186 to 212);

Chapter 12: Health and health care (incomplete, only from 253 to 269).

**Unit 5** *Aspects of social security management and IT*, taught by S. Segaert

The unit is composed of two parts. One will deal with the management of social security as such, the other is more focusing upon the practical application of informatisation techniques in the management of social security. The general theories and skills will be tested as to their applicability and significance in a social security environment. The quality assessment of social security administration as well as the phenomenon of management contracts between more autonomous social security agencies and public authorities will be highlighted. In the second part, trends in Information and Telecommunications Technologies will be highlighted, especially the ones that are relevant to social security policy and administration. It will assist readers identify innovative technological solutions and initiatives and the policies these are intended to support. It will also provide some ideas on future technological solutions that may emerge to facilitate future waves of change.

*Literature* (provided in the reading materials):

B. ZAGLMAYER, P. SCHOUKENS and D. PIETERS, *Cooperation between social security and tax agencies in Europe*, Washington, IBM The Business of Government, 2005, 18-25, 32, 34, 43-44, 36, 40-42 and 45-47 ([www.businessofgovernment.org](http://www.businessofgovernment.org))

J. DEPREST and F. ROBBEN, *E-Government: the approach of the Belgian federal administration*, Brussels, June 2003 ([www.ksz.fgov.be](http://www.ksz.fgov.be))

MINISTRY OF ECONOMIC AFFAIRS AND COMMUNICATIONS OF ESTONIA, *Information technology in public administration of Estonia, yearbook 2004*, Tallinn, 2005 ([www.riso.ee/en/it2004en/](http://www.riso.ee/en/it2004en/))

**Unit 6** *Social Protection Philosophy*, taught by prof. G. Vonk

This unit will concentrate on the values present in social security systems. Whereas other branches of philosophical thinking are already well developed, e.g. labour philosophy, social security philosophy is rather new. The course will therefore start with an examination of the meaning of the very concept of social security philosophy and give an overview of the main thinking in this area. Then the unit will concentrate upon the main values explicitly or implicitly present in the way social security systems are built up. The relationship between social security and some key concepts will be examined: these key concepts include: solidarity, subsidiarity, work ethics, responsibility and personal freedom.

*Literature* (provided in the reading materials):

- K. MARX and F. ENGELS, *The communist manifesto*
- Encyclical of Pope Leo XIII on capital and labor, *Rerum novarum*
- W. KYMLICKA "Contemporary political philosophy: an introduction" Oxford University Press, 2001.



## SEMINARS

The aim of the Seminars was to integrate the various units around one or more central topics. At the occasion of the seminars, participants prepared a presentation on a certain topic (e.g. designing an optimal solution for a given problem). They were doing this in multinational and multidisciplinary smaller groups.

Both seminars started with an introduction (of 4 hours) by an expert into the concrete subject, respectively, prof. Strban for social security co-ordination and prof. Pieters and the local project officers for the converging of social policies.

### **SEMINAR 1:** *Co-ordination of social security systems in the Balkan*

Tutored by prof. G. Strban

This seminar was dealing with the technical issue of social security co-ordination. Practical social security problems caused by cross border movement and migration were solved, by applying possible co-ordination techniques that are enshrined in the major European coordination

instruments. A special focus was given to the typical cross border issues that arise in the Balkan area.

*Literature* (provided in the reading materials):

- P. SCHOUKENS, "Introduction to social security co-ordination in the EU", Instituut Sociaal Recht, Leuven, 2004, 61p.
- J. NICKLESS: *Co-ordination of social security in the Council of Europe – Short Guide*, Council of Europe, Strasbourg, 2004, 5-105
- Legal materials

### **SEMINAR 2:** *Converging social policies in the Balkan*

Tutored by prof. D. Pieters

This seminar has been focused upon the national social security systems of the SISP countries.

The systems were compared among each other; furthermore policy proposals were developed by the participants in relation to specific policy problems that are common to the Balkan region. The participants were also able to evaluate their system in the light of the European standards.

*Literature* (provided in the reading materials):

- Introduction into the social security system of Albania
- Introduction into the social security system of Bosnia and Herzegovina
- Introduction into the social security system of Croatia
- Introduction into the social security system of Kosovo
- Introduction into the social security system of "The former Yugoslav Republic of Macedonia"
- Introduction into the social security system of Serbia
- Introduction into the social security system of Montenegro

Documents prepared by the Local Project Officers for the SISP-programme.

### **Teaching staff of the summer school for the year 2007**

- Prof. Jos Berghman (K.U. Leuven – European Institute of Social Security)
- Prof. Danny Pieters (K.U. Leuven – European Institute of Social Security)
- Prof. Paul Schoukens (K.U. Leuven – European Institute of Social Security)
- Prof. Tine Stanovnik (University of Ljubljana)
- Steven Segaert (e-Governance Academy Tallinn)
- Prof. Grega Strban (University of Ljubljana)
- Prof. Gijs Vonk (Vrije Universiteit Amsterdam – Sociale Verzekeringsbank)
- Mr.Sixto Molina (Council of Europe-Strasbourg)