



# **EQUAL opportunities for all**

Delivering the Lisbon Strategy through  
social innovation and transnational cooperation





# **EQUAL opportunities for all**

## Delivering the Lisbon Strategy through social innovation and transnational cooperation

Neither the European Commission nor any person acting on behalf of the Commission may be held responsible for the use that may be made of the information contained in this publication.



1 : © Carl Cordonnier Daily Life  
2 : © Carl Cordonnier Daily Life  
3 : © Carl Cordonnier Daily Life

For any use or reproduction of photos which are not under European Communities copyright, permission must be sought directly from the copyright holder(s).

Equal Website:  
[http://ec.europa.eu/employment\\_social/equal/index\\_en.cfm](http://ec.europa.eu/employment_social/equal/index_en.cfm)

Europe Direct is a service to help you  
find answers to your questions about  
the European Union

Freephone number (\*):  
**00 800 6 7 8 9 10 11**

(\*): Certain mobile telephone operators do not allow access  
to 00 800 numbers or these calls may be billed.

A great deal of additional information on the European Union is available on the Internet.  
It can be accessed through the Europa server (<http://europa.eu>).

© European Communities, 2008  
Reproduction is authorised provided the source is acknowledged.

Cataloguing data as well as an abstract can be found at the end of this publication.

Luxembourg: Office for Official Publications of the European Communities, 2008

ISBN 978-92-79-10153-3  
DOI 10.2767/5913

*Printed in Belgium*

PRINTED ON WHITE CHLORINE-FREE PAPER

Just as companies in the business world invest five per cent of their budgets in research and innovation to maintain their competitive edge, the European Social Fund (ESF) has been allocating five per cent of its budget to trying out new policy approaches and improving delivery systems. And the laboratory where many of these ideas are tested and validated is EQUAL.

Over the last seven years the ESF's strategic investment in the EQUAL initiative has paid off handsomely: it has mobilised stakeholders and encouraged them in their efforts to tackle the economic and social challenges of the Lisbon Strategy. It has given them a pioneering role in experimenting with new ways of combating discrimination and fighting inequality. It has generated the interest and commitment needed to get the various organisations and authorities to work together, and it has made sure the Lisbon Strategy goals were taken on board by all players, in particular at regional and local level.

The principles and approach developed through the EQUAL initiative are now mainstreamed within the ESF and in national and regional operational programmes, where work on innovation and transnational exchanges will continue on a wider scale.

Drawing on experience gathered in over 3 000 strategic partnerships for change across the European Union, this brochure outlines the strategic lessons of the ESF's investment in EQUAL. It includes experience in non-member countries too, where the initiative has been involved in sharing experience, practice, tools and products and has worked together to find common solutions. EQUAL has also pointed the way to overcoming barriers of language and culture and differences in procedures and rules.

EQUAL has successfully contributed to social inclusion policies and to developing the skills, expertise and capacity needed to manage change on the labour market. It has turned the ESF into a more effective, efficient and relevant instrument for labour market expansion and social inclusion. That is why it is so important to make the best of EQUAL's experience by turning its results to account. The ESF (2007-13) programming period offers scope to continue this innovative approach, taking heed of the lessons learned in terms of policy and practice.

I am confident that the strategic lessons and examples of good practice set out in this brochure will inspire project promoters and stakeholders, giving them direction in their efforts to combat labour market exclusion and to develop pathways for the integration of disadvantaged groups. The Commission will follow these efforts with the greatest interest. More than ever before perhaps, they will stand us in good stead in the future.



**Vladimír ŠPIDLA**

Commissioner for  
Employment, Social Affairs  
and Equal Opportunities



<b>Introduction .....</b>	<b>6</b>
<b>1. Increasing employability .....</b>	<b>12</b>
Pathways to employment.....	12
Empowering people to realize their full potential .....	14
Combating ethnic discrimination in the labour market.....	16
New services to improve social and labour market integration .....	18
<b>2. Encouraging inclusive entrepreneurship .....</b>	<b>20</b>
Stimulating entrepreneurship amongst disadvantaged people.....	20
Start-up support for entrepreneurship.....	22
Financing entrepreneurship amongst disadvantaged people .....	24
Making business grow .....	26
<b>3. Facilitating adaptability .....</b>	<b>28</b>
The value of the life-cycle approach to age management .....	28
Benefits of timely and anticipated management of restructuring.....	30
Lifelong learning for the most excluded.....	32
<b>4. Promoting gender equality .....</b>	<b>34</b>
Territorial alliances for gender equality attention.....	34
Closing the gender pay gap.....	38
Bringing gender into the mainstream.....	40
<b>5. Integrating asylum seekers .....</b>	<b>42</b>
The integration and employment of asylum seekers should start upon arrival .....	42
The empowerment of asylum seekers is an essential part of their integration .....	44
Skills Audits .....	46
<b>6. References .....</b>	<b>49</b>

## EQUAL – STIMULATING SOCIAL INNOVATIONS TO OVERCOME SOCIAL EXCLUSION AND DISCRIMINATION: IN THE WORKPLACE AND IN ACCESSING EMPLOYMENT

The EQUAL Initiative brings fresh ideas to the European Employment Strategy and the Social inclusion process. Its mission is to promote more effective models for employees' work-life and access to work by fighting discrimination and exclusion on the basis of gender, racial or ethnic origin, religion or belief, disability, age or sexual orientation. Funded through the European Social Fund (ESF), EQUAL was being implemented in, and between, the Member States up until 2008.

This brochure presents achievements and the strategic lessons learned under EQUAL, clustered under the five European thematic areas of EQUAL:

1. **Increasing Employability:** "Building on diversity" is the leitmotiv of more than a third of all EQUAL actions. The term "Building on Diversity" is used in this context as a shorthand way of describing a comprehensive approach to valuing the capacities and facilitating the social inclusion of those facing difficulties in entering, or remaining in, employment.
2. **Promoting Entrepreneurship:** About one fifth of the EQUAL actions aimed at "Entrepreneurship for All", i.e. at removing the key barriers or obstacles that prevent disadvantaged groups and deprived regions from being able to set up viable businesses and promoting the social economy as a tool for labour market integration and for meeting social needs.
3. **Facilitating Adaptability:** *EQUAL @ Work* has been the main motto for about a fourth of all EQUAL actions. They focussed on innovations in learning systems that support access to, as well as progression and retention within, the world of work for various groups including older people, people with disabilities, minority ethnic groups and women.
4. **Equal opportunities:** About one sixth of all EQUAL activities tested new models promoting a "European Model of Comprehensive Approaches to Equal Opportunities", linking two crucial aspects of gender equality:
  - › The **Reconciliation** of Work and Family Life" and
  - › The **Desegregation** of the Labour Market"
5. **Integrating Asylum seekers:** The activities on Asylum Seekers aimed to play a role in the identification and dissemination of good practice and policy lessons to help asylum seekers integrate into society. The lessons learned

from EQUAL activities will be used to promote horizontal "Mainstreaming" (promoting changes at the local or regional level and focusing on good practice) and vertical mainstreaming (promoting changes at the political and administrative level).

The following pages present a brief introduction to EQUAL, an overview on its principles and achievements, and an outlook on how the ESF will continue supporting the innovative approach and the good practice under EQUAL.

The strategic lessons synthesise the experience, evidence and conclusions for policy design and delivery, and for stakeholders of relevant EQUAL activities, describe the advantages of new approaches over current practice, and illustrate these with examples from EQUAL partnerships or networks. They have been presented in more detail on the EQUAL website, and constitute a rich source for further developing employment and social inclusion policies and actions in line with the Lisbon strategy.

### 1. The key features

EQUAL was the Community Initiative under the ESF. It was **implemented by all Member States**, following common guidelines established by the Commission. EQUAL has been the largest programme to support social innovation in the fields of social inclusion and employment ever. It allowed accumulating and sharing good practice throughout its six years of its operation, starting in 2002. The programme stood for **€3 bn investment** of the ESF in labour market development and social inclusion and has helped to make the ESF a more effective, efficient and relevant instrument for contributing to the Lisbon reform strategy to create more and better jobs.

EQUAL has provided evidence for innovative and adaptable policy strategies and delivery mechanisms that bring greater inclusiveness to Europe's diverse labour markets, based on the efforts and achievements of **3,480 development partnerships** with more than 20,000 partners, reaching over 200,000 persons in Europe.

The learning experience under EQUAL focused on investigating and testing more effective ways of overcoming social exclusion and tackling discrimination in employment and the job market, and on sharing examples of the resulting **good practice across borders**, with the intention of influencing policy and general practice.



The results of this learning programme have been taken up, adapted and used, throughout Europe, by governments at all levels, social partners, non-governmental organisations and strategic stakeholders and multipliers

The EQUAL experience offers opportunities for learning and delivering reforms:

- By adopting its innovative approach of granting support, based on the governance principles of partnership, innovation, transnational cooperation and gender mainstreaming,
- By building on the strategic lessons learnt for designing and implementing employment and social inclusion policies and actions.

## 2. A new approach of support under the ESF: Four principles of good governance under EQUAL

The architecture of EQUAL has integrated the essential features of good governance as it addresses cross-cutting policy issues, and calls for applying sound management principles in its design and implementation: It has worked across and beyond institutional boundaries, by promoting partnerships of key stakeholders. As an innovative programme, EQUAL has questioned established ways of dealing with situations and encouraged to test new and creative ideas, last but not least by integrating a gender perspective into all actions. Learning has been based on experience of what works and what does not, taking fully into account of national and European experience.

### 1. Partnerships

EQUAL has been based not just on single projects, but on **development partnerships**, which commit actors from different institutional families (local authorities, companies, universities, trade unions etc.) around a common concern in labour market development and social inclusion, building their capacity to work together in the long term.

The main achievements of EQUAL are based on the work of the partnerships. This has resulted in a wide **mobilisation, empowerment and capacity building of strategic stakeholders for reforms and their delivery**.

### 2. Social innovation and mainstreaming of results

The ESF – like many competitive industrial firms – invested 5% in the development and testing of new approaches and new forms of policy delivery, new services and tools; EQUAL has served as the ESF R&D department.

In that role, EQUAL has elaborated new ideas for labour mar-

ket development and social inclusion, and tested their suitability, feasibility and acceptance under real conditions, in other words: it has launched **social innovations** to implement the Lisbon reform agenda on the ground. An integral part of all innovation activities was the '**mainstreaming**' of results – this was an organised approach to inform policy and practice.

As a result, EQUAL managed to support social innovators from a broad variety of organisations in pioneering new services and more inclusive support strategies.

### 3. Gender Mainstreaming

EQUAL has tested effective ways to implement **gender mainstreaming** as a management tool – both at programme and project level - to better discover and understand the causes of inequalities between women and men in our societies and come up with appropriate strategies to tackle them.

EQUAL has shown that it is possible to integrate the gender perspective into every step of the policy processes – design, implementation, monitoring and evaluation - with a view to promoting equality between women and men.

### 4. Transnational exchange and cooperation

EQUAL has been designed as a **learning program**. In addition to learning from innovation, it also provided the opportunity to learn from other Member States, through networking and learning communities, peer reviews, and exchanges of good practice, organised collaboration with partners from other countries.

EQUAL did pioneering work into finding ways to overcome barriers to **transnational exchange and cooperation**, which will be needed to create a truly European labour market.

## 3. Partnerships: a framework for dialogue and action

The main achievements of EQUAL are based on the work of the development partnerships that has resulted in a wide mobilisation, empowerment and capacity building of strategic stakeholders for reforms and their delivery.

This has to be seen in the context of the European Union's and the Member States' commitment to implement the **Lisbon reform strategy**, which calls for partnerships at all levels "*to facilitate and speed up delivery of the reforms needed to boost growth and employment*".

However, implementing the partnership principle as an element of good governance requires specific **skills and resources, commitment and a strategic approach**. Across Europe, EQUAL has made a significant contribution to building the **relevant capacities for learning and reform in partnership**.

This process makes it possible to reach out to people in regions, cities and at local communities; in fact there are few or **no alternatives to partnerships** as a means to involving the local actors directly.

Partnerships proved to be a development tool by providing a **framework for dialogue and action** to mobilise all stakeholders around a labour market issue, thereby contributing to good **governance and a greater ownership** of the Lisbon reform objectives, in particular at regional and local level.

The involvement and support of trusted organisations in the modernisation and delivery of labour market policies has helped to increase the **acceptance of reforms** by stakeholders and citizens.

Emerging from this is the other important and related principle of **empowerment**: EQUAL has demonstrated that working in partnership can help to directly engage disadvantaged groups and their organisations, give them a **voice in the political arena**, and build capacity to act strategically.

#### **Empowerment: Promoting Personal and Organisational Development**

EQUAL has demonstrated how the term “empowerment,” which may not find immediate equivalents in other languages and cultures, can be translated into practice in a number of different ways.

EQUAL has placed an emphasis on developing the ability of informal groups to organise themselves in a more structured and efficient way to change the process of economic and social integration in their neighbourhoods. By working together, the potential for change has been increased and groupings of beneficiaries have taken the lead in many projects. This has helped to ensure that they have become part of the solution rather than being regarded as part of the problem.

EQUAL has piloted approaches that have enabled disadvantaged groups to make an impact on the design and implementation of measures to assist their vocational integration. It has also demonstrated that by taking this consumer opinion seriously, considerable improvements can be made to the formulation and delivery of such measures

A guideline for empowering quality models has been created in EQUAL that can be introduced into the management processes of all agencies in the integration chain. This guideline helps to create a win-win situation, as clients who are given the freedom to decide on their integration pathways are much more likely to sustain their involvement and progress towards employment.

Finally, EQUAL has generated a better understanding of empowerment as a process that:

- increases the capacity of individuals to make choices and to transform those choices into desired actions and outcomes;
- encourages, and creates opportunities for, disadvantaged

people to voice their views and needs in an open dialogue with decision makers and practitioners.

## **4. Innovation: a powerful tool for organisational learning, policy development and social; change**

Social innovations are important motors for two dynamic processes supported by the Lisbon strategy:

- The **modernisation of the economy**, and in particular its transformation into a knowledge-based economy requires not only investment in new technologies, but also investment in organisational innovations facilitating the acquisition of skills and competencies, the adaptation of work organisation and business routines, or the establishment of business networks and partnerships between stakeholders.
- Implementing **policy reforms** to meet the Lisbon targets by stimulating employment, promoting social inclusion, and activating knowledge and learning requires modernisation of the way public administrations work, developing and testing new policy approaches and introducing new ways of delivery.
- Under EQUAL, innovation has been understood as a social process covering both **experimentation** and **organised transfer** and adoption (“mainstreaming”) of validated solutions **into policy and practice** policy and general practice.

EQUAL has stressed the need for **strong linkages** between these two processes. They are not following one another, but **run in parallel**, and therefore need to be planned right from the beginning. EQUAL experience has highlighted key success factors for social innovations:

- they address real needs,
- the results demonstrate clear advantages over existing practice, and
- potential users are involved and assisted right from the beginning.

EQUAL winning stories have proven that innovative approaches are a cost effective and sustainable way of introducing social change.

#### **A test lab for the future**

EQUAL gave ample space to **experimentation**, which has been understood as an opportunity for organisational learning, based on experience and testing, under real conditions, of what works and what does not. This was brought about through systematic evaluation and using sound evidence for assessing and implementing policy and practice alternatives whilst also learning from peers and taking full account of national and European experience.

Successful **experimentation** under EQUAL, for a broad range of employment and social inclusion issues, has generated

- Insight into, and knowledge of, the nature and forms of discrimination, inequality, and labour market exclusion shared by strategic stakeholders (**What** are the key problems to address?);
- Confidence in the advantages of innovative solutions in terms of cost-effectiveness, quality or additional features (**Why** is their transfer and incorporation into regular practice suitable and feasible?);
- Understanding the conditions for, and advantages of, improved strategies and actions, also in the light of experience in other Member States (**How** to tackle the key problems?);
- Acceptance, mobilisation and commitment of key stakeholders for implementing the innovative solution, based on the credibility of the partnerships (**Who** will use the innovations?).

#### Organised Transfer and Mainstreaming

Innovative solutions are not implemented **automatically**, and the innovators need to be **nurtured and encouraged** throughout the innovation process.

A key milestone in the innovation process is the validation of results. That means that they have to provide evidence and are able to demonstrate that they are

- **suitable**; i.e. show advantages over current practice and other innovative options, generate additional value, and are relevant.
- **feasible**; i.e. are realistic, can be used as models, and can be implemented elsewhere.
- **acceptable** to the disadvantaged and excluded groups, to administrations and stakeholders.

EQUAL has proven the advantages of innovative solutions in two ways. It has produced a large body of evidence of the benefits of the thoroughly validated good practices, the most relevant of which are presented in the following sections. Moreover it has involved stakeholders in the development and validation and therefore can call on testimonies from opinion leaders and decision makers

Social innovations tested and validated under EQUAL have been successfully **integrated into policy and practice** across a **broad range of fields**. These include

- reaching out to **integrate disadvantaged groups** into the labour market, such as migrants or people with disabilities
- **developing effective links** between social inclusion and labour market actors and institutions

- improving **the quality of the work environment** through more flexible working time arrangements or work organisation that benefit both employers and employees
- supporting emerging trends and partnership models in the fields of social economy and business creation
- creating synergies at local, regional and national level ("**systems innovations**") by establishing new interfaces between organisations; new modes of coordination and cooperation between institutions and support organisations; or networking and partnerships between stakeholders

## 5. Partnership and Innovation build effective and sustainable pathways for the transition between institutions and work environments

EQUAL gave priority to developing and testing robust, effective and sustainable pathways for the **transition between institutions and work environments**

- The key mechanism for developing these pathways were partnerships between strategic stakeholders: Quite often these stakeholders represent different worlds, as they operate in different policy fields and pursue different objectives, apply different administrative rules and procedures, and differ in terms of resources. They are successful if they manage to develop a common assessment of the challenges, and a coordinated strategy for tackling them.

EQUAL paid the **learning costs** for establishing sustainable models of cooperation and coordination between authorities at different levels and with different responsibilities, education and training organisations, social partners and NGOs.

There are numerous successful examples of good practice that demonstrate how EQUAL served as a test bed for managing **integrated pathways** and transition

- from school to apprenticeship and work;
- from unemployment to work;
- from prison to employment;
- from inactivity or parental leave to work;
- from informal work to self-employment;
- from migration to work;
- from full-time work to part-time work and back to full-time;
- from work to retirement.

Many of these examples have also developed good practice in combining work with life-long learning, and support for reconciling work with family/private life.

Key success factors for integrated pathways include:

- partnerships between key stakeholders and regional and local authorities; direct involvement of the disadvantaged target groups
- organised learning from other regions and Member States but also
- sound validation and mainstreaming methodologies, and
- strong links to policy agendas and policy makers.

## 6. Gender mainstreaming: Making gender equality an integral part of all policies and practices

Although gender equality has been on the policy agenda of local communities, regions, enterprises and organisations for a long time, EQUAL often had to overcome their reticence to committing themselves to more than specific actions for women. Thanks to EQUAL's transversal principles it was possible to integrate the gender dimension into most of the programme's thematic areas:

- **Partnership** helped to plead the business case for gender equality and to overcome this lack of political will. Success stories that demonstrated how gender mainstreaming boosts territorial development convinced decision-makers at all levels, in particular if communicated through peers in the framework of national or transnational partnerships or networks.
- Through an **innovative mix** of activities in different policy fields EQUAL contributed to mitigating the consequences of the demographic changes and population decline. It created favourable conditions for business investments and economic growth through making cities and regions better places to live and work for both women and men. These concepts orchestrated strategies of stimulating the cultural environment, providing excellent educational institutions, performing public transport systems and family support services such as care for children and other dependants. Combined with more family friendly personnel policies of local companies all these measures enabled more women to access employment and added to the important "soft factors" in territorial development.
- Gender mainstreaming is a management tool that helps administrations, organisations and companies can optimise the potential of their human resources and also of all their services and products. **Transnational cooperation** as supported by EQUAL was paramount to transfer methods and tools from Member States that are more advanced in their gender equality performance than others that are still in the early stages of gender mainstreaming. The result of this shared learning, peer sup-

port and transfer is an approach that is now increasingly applied throughout Europe. It incorporates the same steps, which are crucial to make the integration of the gender dimension both systematic and sustainable.

- a gender impact assessment of the chosen policy field to find out how women as compared to men benefit from existing, and might benefit from intended policies; formulating gender equality targets and action plans aimed at closing gender gaps and combating discrimination;
- finding most realistic and viable solution in terms of cost benefits, available time and organisational context;
- implementation of the selected option geared to integrate gender equality into the management and control systems of the participating organisations;
- effective monitoring and evaluation as key ingredients which ensure an on-going improvement of gender equality performance.

## 7. Transnational cooperation: Learning from experiences in other Member States

Creating a more inclusive labour market across Europe is an ambitious and challenging task. EQUAL has shown that transnational exchange and cooperation can play a key role in securing the right environment for organised learning from other countries. Working with **transnational partners ensured a European dimension** for both the identification of relevant issues, and for mainstreaming the results.

EQUAL has been structured to foster and promote effective transnational cooperation and to encourage the transfer of know-how and good practice between partnerships, national thematic networks, strategic stakeholders, and governmental institutions, in particular EQUAL Managing Authorities and governmental departments in charge of policy supported under the ESF.

The experience has shown that transnational cooperation is not easy, but it can often be the most effective way of achieving results unattainable under normal circumstances. This is because transnational cooperation provides a tool for the kind of lateral thinking required to achieve innovation.

The transnational dimension of EQUAL has been organised in such a way that it is not simply "an add-on" for a few actors, but an integral part of all the partners' work. A key factor for the success of EQUAL's more than 1,000 transnational partnerships has been the fact that every partner took part in the sharing of ideas, experience and expertise, which has built up a common understanding of labour market and social inclusion issues, a pool of shared practices, products and tools, and of long-lasting working relationships between organisations from all over Europe.

Evaluations and case studies have underlined the effectiveness of transnational co-operation that has generated clear benefits

for individuals, organisations and governmental programmes involved, such as:

- the stimulation and support of innovative action through peer encouragement, and through reducing the risks inherent in innovation through peer guidance and learning;
- cost-effectiveness by avoiding unnecessary duplication of work or following blind alleys, by applying common tools, standards or procedures, and by providing a broad basis for benchmarking;
- capacity-building through connecting with professional European networks.
- better quality of the work of participating organisations, based on improved access to information, expertise and experience.

## 8. How will the ESF 2007 – 2013 support the innovative approach and the good practice developed under EQUAL

The **ESF Regulation** has mainstreamed the management principles of EQUAL (partnership; innovation, gender mainstreaming and transnational cooperation), and made them obligatory for the new ESF programmes 2007-2013.

The integration of **transnational cooperation** is already a visible success of mainstreaming the EQUAL approach of learning into the ESF mainstream programmes.

**42 of the 117 ESF Operational Programmes (Ops)** will promote transnational cooperation within the framework of a **dedicated priority axis**. **All the 75 other OPs** will promote transnational cooperation under all or some of the **thematic priorities or in priorities for technical assistance**. **All in all, € 3 BN will be used for transnational cooperation by the ESF 2007-13.**

These most frequently listed themes are those that also play an important role in EQUAL:

- disadvantage, discrimination, diversity: Pathways to integration and re-entry into employment for disadvantaged people; combating discrimination in accessing and progressing in the labour market and promoting acceptance of diversity at the workplace;
- gender and work/life balance: Measures to improve access to employment and increase sustainable participation and progress of women in employment to reduce gender-based segregation in the labour market, and to reconcile work and private life, such as facilitating access to childcare and care for dependent persons;
- lifelong learning in firms, entrepreneurship and innovation: Development of life-long learning systems and strategies in firms; training and services for employees to step up their adaptability to change; promoting entrepreneurship and innovation;
- promoting partnerships, pacts and initiatives through the networking of relevant stakeholders

**Labour markets in the EU have existing skill and labour shortages which will soon be reinforced by the ageing of the population, and so the talents and potential of all citizens must be used to the full. This necessity is reflected in the Guidelines of the European Employment Strategy, as they stress that “particular attention must be paid to significantly reducing employment gaps for people at a disadvantage.” In addition, one of the priority actions of the European Social Fund (ESF) is to provide such people with pathways for integration and entry into employment. EQUAL’s six years of experience in designing and delivering integration pathways for people with disabilities, migrants and ethnic minorities, (ex)-offenders and other groups at risk of social exclusion can be put to good use by these mainstream ESF Operational Programmes.**

### Effective pathways to employment combine personal support with self-responsibility

The integration pathway approach successfully tested by EQUAL started from the explicit recognition that those who are hit first, most frequently and longest by unemployment are usually people who are several times disadvantaged through an accumulation of different factors such as lack of skills or experience, housing problems, minority status, poverty and social marginalisation. The main innovative aspect of the approach lies in providing a low-threshold entry point to a multi-stage integration process that links and matches the needs and interests of vulnerable individuals to different, hitherto separate, services. All pathways should contain **education and training, employment and support** components but the ongoing, personalised support and follow-up will have to deal with other issues and problems if these individuals are to function effectively in education, training or employment.

The Match Development Partnership (DP) developed the Work-Wise Programme in the Netherlands, which offers a route leading young offenders to employment and education through a fixed step-by-step plan that provides a good place to live, a developed social network and opportunities for leisure activities. The Work-Wise model takes account of the young offenders’ options and limitations and focuses on self-regulation and autonomy. This programme now operates in all 14 Custodial Institutions and expects to deal with **3.500 young offenders during 2008**. Previous results show that six months after they leave the institution, **75% of these young people are in work or education or both and more than 96% still have a safe place to live.**

The outcomes of EQUAL pathways projects in many countries indicate that this approach is more successful when the individual recognises that he or she is not only involved in, but is responsible for, the process. Thus, integration agencies should accept that disadvantaged people have a role to play in their own integration, as this will create a win-win situation - by allowing clients to play a part in decisions agencies are more likely to sustain their involvement along the pathways.

### Integration pathways meeting skills and job requirements in the labour market

Successful reintegration into employment requires skills and qualifications that have a real market value. Therefore, in EQUAL’s pathways, there was a focus on adapting education and training to changing labour market needs and on linking vocational preparation with new forms of work experience. The involvement of employers, enterprises and chambers of trade or crafts in the design of these new measures has proved to be an important factor in guaranteeing their success.

A good example of labour market requirements is ICT skills, which are now needed in many jobs, and here differentiated approaches had to be adopted to integrate the full range of disadvantaged people. In a number of instances, EQUAL overcame the barriers posed by security issues, specific legal requirements and conventional attitudes towards offenders so that prisoners could take advantage of ICT and distance-learning. ICT also offers powerful tools and new options to enhance the active participation of people with disabilities, and approaches within EQUAL have included training in ICT coupled with the development of many distance-learning modules related to trade, media and advertising. For immigrants and Roma, ICT skills were often regarded like literacy or numeracy and were provided as basic skills to back up subject-specific training.

*“Vocational preparation should also equip disadvantaged people with personal and social skills to find their way into training or work, to stay there and to cope with change.” - Wilfried Hendricks whose organisation ran the Member DP.*

The French DP Se Qualifier Hors Les Murs (‘get qualified outside the walls [of the training centre]’) combined open and distance-learning and “alternance” (linked theoretical and work-based) training. Whilst it was a national project for people with disabilities, its services were delivered by local networks of tutors, so that the trainee did not have to give up his or her social or family environment or system of health care. The benefits of this new cooperative approach were quickly apparent. People with disabilities had better access to training as it was provided where they lived, or close by, and for the first time they had a chance of gaining a qualification. They also had individualised training courses adapted to their constraints and requirements. By the end of the project **the number of people who had completed the courses was approximately the same as those who were trained in a traditional vocational rehabilitation centre.**

EQUAL has also shown that improving “soft” skills such as communication, team-work and knowledge of the workplace boosts the capacity of members of disadvantaged groups to demonstrate their potential and “added value” to employers.

### Promoting a business case for employing disadvantaged people

Time after time, statistics and research confirm that having a job is the single most important factor in successful (re)-integration into society. Thus, EQUAL set a very high priority on the involvement of employers and their organisations. A number of different tools and techniques were used to raise employers’ awareness of the untapped pool of workers represented by diverse and disadvantaged groups and to promote the “business case” for their employment. EQUAL experience has indicated

that the best person to convince an employer about hiring someone from a disadvantaged background is another employer who has had a positive experience of recruiting such a person. This points up the importance of associating representatives of employers' organisations very closely with the planning and delivery of any programme or campaign to extend employment opportunities for disadvantaged groups. Similar trade union involvement can also help by making workplaces more welcoming to diverse or disadvantaged groups

In addition, EQUAL has shown that new services like workplace audits and assessments, new improved recruitment procedures and diversity training for managers and employees can persuade employers that the necessary support would be available if they decided to employ a disadvantaged person. The results demonstrate very clearly that offering such services as part of a comprehensive package can provide a strong incentive to recruitment, as employers will feel more confident that any problems that might arise can be speedily resolved.

In Ireland, *Access Ability* provided a real one-stop-shop that offered a wide range of services on disability and also diversity issues. If, in the unlikely instance that a "product" an employer wanted wasn't "on its shelves", the partners offered such a wide range of knowledge and expertise that the supply solution could quickly be found whether it was information, advice, consultancy or training. The interest generated by the quality of the DP's intensive pilot work with **over 100 SMEs and large companies** resulted in its *services* being continued, on a permanent basis, by the lead organisation in the DP.

Another route to an acceptable and economically viable form of work is very challenging as it involves supporting disadvantaged people to become entrepreneurs. EQUAL has pursued two mutually reinforcing lines of action which were training in business creation and all the related administrative and financial procedures coupled with establishing, or searching for, lines of micro-credit or other loans that could be used to set up these business.

EQUAL promoted self-employment and new businesses in "niche markets", for example:

- Import/export in new goods and services by using immigrants' contacts in other counties and their language skills;
- Employment opportunities for actors with disabilities by exploiting the media's responsibility to portray the reality and composition of society;
- A successful business based on one female offender's idea of making and marketing sausages from the meat of a rare variety of pig.

The positive outcomes of EQUAL suggest that more effort should be invested in this challenging route, not least because it enables these new, successful entrepreneurs to "bypass" any potential prejudice from would-be employers or employees.

### Providing effective support through mentoring

Many disadvantaged groups are isolated from, or have problems in accessing, those services that might help them in their social or vocational integration. Thus, to begin to provide support and to develop integration pathways, effective outreach strategies were devised in EQUAL.



*Widening opportunities for people with disabilities.*

In Comarca Mancha Conquense, a rural area of the province of Cuenca in Spain, the *Pangea* DP provides a vast array of services to promote the integration of immigrant men and women. Much of its success hinges on people called "intercultural links." They make contact with members of the immigrant population wherever they are to be found in cafes, markets, social centres, fairs and cultural events. Within this team are "links" who, in addition to communicating in Spanish, can speak Arabic, Romanian, Russian, English and French. **Of the 3.832 immigrants** that live in this rural area, **Pangea has helped more than 2.000** through one or more of its activities.

On the evidence available from EQUAL, there is a convincing case for a much wider deployment of new types of operators such as intercultural "mediators" who have the empathy, understanding and communication skills to make and sustain effective contact. Such mediators, "path-planners", mentors, tutors and "multipliers" can play a pivotal role in providing individual guidance and follow-up. They are "closer" to members of disadvantaged groups, and can also work as brokers who, on a one-to-one basis, link individual needs to opportunities and mainstream services, match people to jobs and provide continuing assistance for a period after the placement, both to the individuals and to their employers.

If people from disadvantaged groups are to be integrated realistically and positively, they require understandable and structured pathways. The difficulties that they face in accessing employment and in playing a full role in society can only be overcome by departments and services working together – education, training, guidance and placement agencies together with housing, health and social services. Fortunately, these types of cooperative arrangements were greatly facilitated by the "Partnership Approach" which was a key principle in EQUAL, and so it has been possible to demonstrate how successful pathways can be built on the active cooperation of all the agencies and services involved. Thus, in the 2007–2013 ESF programming period, the existence of a strong, local partnership should be an important criterion for the allocation of assistance to projects that seek to develop integration pathways or other measures for disadvantaged people.

*For more information please see "Pathways to Integration and (Re-entry) into Employment for Disadvantaged People: Good Practice and Strategic Lessons from EQUAL." [http://circa.europa.eu/Public/irc/empl/equal\\_etg/library?l=/etg1/04\\_examples/integration\\_disadvantage](http://circa.europa.eu/Public/irc/empl/equal_etg/library?l=/etg1/04_examples/integration_disadvantage)*

*Empowerment is very often regarded as a buzz word, which does not translate easily into many European languages. It is also a concept which practitioners and policy makers treat with suspicion - the former see empowerment as a challenge to their professional status and the latter see it as a challenge to their position of power. However, when it has been used effectively empowerment has proved to be one of the most powerful approaches in promoting the inclusion and integration of the most disadvantaged groups and EQUAL has been successful in both measuring and transferring this approach.*

### Stimulating the active involvement of disadvantaged people in improving their own employability

EQUAL Development Partnerships (DPs) put the life situations of their beneficiaries at the centre of their activities. However, given their relative lack of success in education and employment, many people with difficulties in accessing the labour market need to come to realise that they themselves can contribute to improving the quality of their lives. Through social, cultural and sporting activities, EQUAL has strengthened the motivation of people to change and has proved to them that they have the capacity to change and to access employment.

*“Individuals who have experienced marginalisation become Experts through Experience and have a lot to offer in developing successful approaches and policies for inclusion.” - Elisabeth Lindgren - a participant in the Swedish EQUAL DP run by the Basta cooperative.*

EQUAL has demonstrated that disadvantaged groups can play a crucial role in the planning and monitoring of various measures, when discussion forums or other platforms are established to capture their views. Such approaches also ensured that people were part of the solution rather than being regarded as part of the problem. Another reason for working with groups is that individuals from the most marginalised backgrounds often need to develop or rediscover their social skills. Active participation in a group in which the members share the same experiences strengthens their identity, as they can see their individual experiences within a larger pattern and can also learn and draw strength from other people who are, or have been, in similar situations.

Sweden has had considerable success in using a group work or social cooperative approach to integrate drug users, ex-offenders and people with psychiatric problems. For example, an [external evaluation](#) of the Basta and Vågen ut! DPs calculated their social profits per year, which are the public costs that are eliminated or reduced when addicts recover plus the production values in these two cooperatives. The resulting figure of 13 million euro roughly equates to the budget for the addiction programmes in a Swedish city of 200.000 inhabitants.

Solutions piloted in EQUAL have highlighted the need for pre-vocational training. This training should include a range of activities that help disadvantaged groups to develop confidence and esteem and provide opportunities for participants to “learn” from each other. Also, NGOs have a specific role to play in working with the more formal training and employment agencies to pioneer new approaches.

### Tools to promote and monitor empowerment are now available people in improving their own employability

EQUAL has addressed the question of how **the full participation of people** can be promoted by enhancing the individual's capacity to make an impact on the design and implementation

of measures that are intended to increase **their employability**. EQUAL experiments have sought to counteract the fact that integration or re-integration can be a very lengthy process and that the longer it continues the more people will be discouraged to engage in any form of proactive behaviour. These tests and experiments have:

- Created new instruments to measure empowerment;
- Developed new roles to promote empowerment in vocational integration;
- Established methods for empowering organisations that are part of the integration chain.

The new tools and methods developed by EQUAL have recognised the importance of developing the competences, skills and knowledge required for navigating through the integration process to the highest possible level and the need to build on each individual's existing abilities and aptitudes. Some tools can be used to measure **individual empowerment** and a range of training modules and other

learning opportunities have then been created that have been used to redress any individual deficiencies or shortcomings that were identified through this measurement.

The Dutch [VrijBaan](#) DP developed an instrument to measure the empowerment of people with disabilities that covered factors such as autonomous freedom of choice, the ability to retrieve and handle information and to compare different options, assertiveness, social skills, acceptance of one's own disability and related dependence or independence. The results were then used to develop tailor-made training pathways that could be constructed from over 160 modules that the DP had identified. In the second round of EQUAL, the DP's approach was used to good effect with other target groups. It has now been totally adopted by the five rehabilitation institutes in the Netherlands and by three regional vocational training services and, in addition, 190 individuals from other vocational training services, firms, social enterprises and training organisations have been trained and licensed to use the VrijBaan questionnaire and its training modules.

The success of the methods of measuring individual empowerment that were developed in EQUAL suggests that they would be extremely useful tools for those public employment services and training agencies that are increasingly adopting an individual pathways approach to working with their clients.

### Empowering support in vocational integration

Another method of developing empowerment concerns individualised support in the integration process. Three main roles have been tested under EQUAL and these have the potential for further, large-scale application. They are based on the principle that the 'client' is the principal actor and the services and support are designed and provided at that person's request.

One approach ensures that people have a **personal coordinator** who is available to advise and support them in all their contacts with various services and agencies throughout the entire integration process. Positive experiences have also been gained through EQUAL from the further development of Supported Em-



ployment Schemes that provide a **job coach** to assist but not to take any action in the search for employment without discussion and agreement with each individual. Contact is then maintained until each individual feels settled in the new workplace. The job coach is a relatively new role - EQUAL provided a platform for the sharing of experiences, and certain common elements in the preparatory training have emerged. Another job profile that has been developed in EQUAL is that of the **peer supporter or peer role-model**. These peer approaches have two main benefits in that the supporters or role-models are empowered through their training and subsequent employment and, at the same time, they help to motivate and empower other clients of the DPs on the basis of "Well, if they can do something like this, then maybe we can too!"

The **Success** DP in Sweden offered a personal coordinator to help participants come to clearer decisions about their future. This required a type of listening similar to listening to a friend rather than conducting a therapeutic interview. The picture obtained was not limited to the person's problems - it also included the resources the person had, as well as his or her interests, goals and expectations. The next stage concentrated on motivating the individual to take charge of the situation and to follow through on his or her ambitions. The results of the approach have been impressive, as 50% of the people originally seen as being "hopeless cases," having been on long-term sickness or unemployment benefit for periods of up to 10 years and approaching retirement age, became actively involved in work or full-time training.

The outcomes of this EQUAL experimentation are templates for new roles that, if adopted or adapted by public employment services and training agencies, perhaps in conjunction with other agencies or NGOs, would significantly improve the take-up of their services by disadvantaged/diverse groupings.

#### Empowerment and organisational development

"Nothing about us without us" is a concept or slogan that has emerged from EQUAL's attempts to stimulate the active involvement of disadvantaged groups. However, EQUAL has had to tackle a major problem in this respect - the fact that, although many professionals and integration service providers agree with this principle, they very rarely apply it to their own work."



Personal support - an important aspect in empowerment.

All of the EQUAL experiences suggest that the traditional caring or helping approaches found in training, employment services and employment initiatives tend to perpetuate dependency. Organisations in the integration chain have to at least respect, if not stimulate and strengthen, the individual's empowerment to make sure that he or she can take charge of the integration process. EQUAL has demonstrated that these organisations and their members of staff must themselves be empowered if their responsiveness to marginalised individuals is to be improved.

#### Seven messages from EQUAL on empowerment

1. Empowerment is a process aiming at a change in power relationships that can apply to individuals, groups, organisations or communities.
2. Empowerment is a two-way change: on the part of those who previously had little or no power and on the part of those who hold authority and power in employment, social, cultural and political systems.
3. Empowerment should take place in the context of a comprehensive approach that tackles a range of psychological, social, cultural, and economic issues.
4. Empowerment implies different approaches to lifelong learning, including aspects of social learning, and is based on more interactive methodologies that give a central place to learning by doing.
5. Empowerment needs non-traditional approaches to conflict management and resolution. By questioning the implicit consensus between those in power, it throws a new light on the assumptions on which policies, programmes and professional approaches are based.
6. Empowerment recognises the fact that power takes many forms and remains partial and relative: the exercise of power requires the management of tensions between co-operation and competition, between a value-based commitment and the possibility of coercion, between reliance on fair exchange and autocratic behaviour.

#### AND FINALLY THE MOST IMPORTANT MESSAGE OF ALL

7. Empowerment requires a change in professional practice and in the process of policy making. Those who previously had little or no power must be listened to, as they have acquired expertise through what they have experienced. Their knowledge, their aspirations as well as their needs, opinions and insights must be taken seriously in a common attempt to find solutions to the problems that they are facing.

For more information about EQUAL European Events on empowerment please see the **2007 EQUAL NI Conferences**

***Discrimination against ethnic minorities is a daily reality in the European Union. Whilst it may not be the only reason for their exclusion from the labour market, it is certainly the most decisive. Within EQUAL, more than 350 Development Partnerships (DPs) have tested new approaches to overcoming this discrimination. This critical mass of experience can inform new ESF action and offers good practices to be replicated on a much wider scale.***

**Strategies to prevent discrimination must include a critical review of institutional practices**

EQUAL identified a strange dichotomy. Certain roots of discrimination were inherent in those “systems” or structures that had been designed to assist all individuals in their access to employment. Thus, gaps existed between equality as defined in legislation and equality as practised in the labour market, and they demonstrated that laws by themselves are simply not enough. If discrimination is to be eliminated, institutional practices and prevailing attitudes to migrants and ethnic minorities have to change and anti-discrimination actions must become central to any organisation’s mission and be legitimised at all levels of management. EQUAL has demonstrated that such change can be brought about by challenging current placement and recruitment processes and by providing training for employment intermediaries, employee representatives, company managers and key actors in NGOs.

***Anti-discrimination skills should become an integral part of the professional competence of labour market intermediaries***

Sometimes discrimination against ethnic minorities is a result of a lack of understanding of the disadvantages these groups face. However, anti-discrimination skills such as cultural awareness and the capacity to evaluate one’s own potentially discriminatory practice are not, as yet, commonly recognised as being indispensable aspects of professional competence. EQUAL has shown that **new forms of training** can improve the capacities of professionals in employment services and other labour market actors to detect, and cope with, discriminatory practices that ethnic minority groups often encounter in recruitment and placement processes.

The French **ESPERE** DP launched an unprecedented programme of in-service training to sensitise the agents of the Public Employment Service (PES) to the issue of combating and preventing discrimination. This programme was tested in six pilot areas and is now being mainstreamed on a much wider scale with the intention of ultimately reaching all 50 000 officials working in the PES. The joint “**Charter of the Public Employment Service**” against discrimination, for equality of opportunity and the promotion of diversity, which was adopted by the institutions of the PES and the Ministry of Employment in November 2005, provides a strong underpinning for this mainstreaming process.

Outcomes from EQUAL highlight the need to help public and private employment services ensure that all their labour market intermediaries have access to, and benefit from, specific training on issues related to respecting ethnic and cultural diversity, intercultural knowledge, anti-discrimination legislation and non-

discriminatory intermediation techniques. Such training can also help to break down existing barriers between training, employment and advisory services and facilitate equal access to these services.

***Diversity in the workplace engenders significant assets for both ethnic minority workers and employers***

Positive attitudes towards ethnic diversity can help to overcome discrimination and create a more inclusive labour market. To remain competitive, especially in a global economy, enterprises must be able to embrace the creativity and build on the potential of a diverse workforce, by recognising and actively promoting different individual talents.

***“Training all the public employment service agents is an essential lever in fighting discrimination.” - Jean Gaeremynck - Delegate for Vocational Training and Employment, France, addressing the EQUAL conference on Acting against Ethnic Discrimination in Employment.***

The debate on “**Responsible Entrepreneurship**”, “**Corporate Social Responsibility**” (CSR), and “**Diversity Management**” has gained momentum in recent years. This debate offers a new framework for harnessing diversity and CSR in favour of migrants and minorities and for a

constructive dialogue between employers, trade unions and the public sector on this issue. EQUAL has demonstrated how this dialogue can be used to mobilise employers and trade unions. It has shown that employers will engage in the creation of opportunities for ethnic minorities and in new forms of partnership with employment services, if such cooperation is clearly focused on reconciling business objectives with social responsibility. EQUAL has also been a driving force in developing and promoting formalised “codes of conduct” or “diversity charters” that articulate action against ethnic discrimination with the issue of CSR.

The Italian **AHEAD** DP involved the Confederation of Crafts Enterprises and a large national bank in promoting anti-discrimination attitudes among employers as an integral part of the enterprises’ *ethical and social responsibility*. The approach combined awareness-raising and training activities with support for business development such as better credit facilities for ethnic minority and other small enterprises which complied with *codes of non-discriminatory conduct* that were promoted by **AHEAD**. The project created a quality label for SMEs that subscribed to the Codes of Conduct. In parallel, **AHEAD** initiated and provided training for a network of senior staff from members of the Confederation and the bank that enabled them to operate as advisors for implementing the Codes of Conduct and as certifiers of the quality labels. It also established advice desks for business creators within the employers’ organisation and in the branches of the bank, including a special “migrant banking” service. This good practice has been disseminated among the member companies of the employers’ Confederation and also more widely at national level.

Where “diversity charters”, “equality awards” or “codes of conduct” have been introduced, they have motivated private and public organisations and employers to take a proactive stance on developing work force diversity and ensuring fair recruitment processes. At the same time, these tools have enhanced the public image of the organisations by increasing their profile as socially responsible employers.

## Dismantling preconceptions that prevent the integration of ethnic minority groups in employment is both an economic and a social necessity

This stance has been central to EQUAL's approach to combating racism and xenophobia. The vocational and also the social integration of ethnic minorities can be greatly enhanced if the views of the social partners and public attitudes in the local community are broadly supportive of their needs and interests. Given the importance of the media in everyday life and in shaping public opinion, it is therefore vital that ethnic minority and migrant groups are portrayed in an accurate and unprejudiced fashion and thus they should have an opportunity to influence media output.

A clear message from EQUAL is that offering training and other support to members of ethnic minorities can motivate and enable them to enter a career in the field of media and help to ensure that radio, television and print do not reinforce racism, stereotyping or cultural clichés. EQUAL experience also demonstrates that new means and techniques of creating a positive climate can be brought to bear by soliciting active support from the media, including from public and private broadcasting companies.

An outstanding example of transnational approaches to promoting diversity in the media is the work of the Media Platform which was launched within the framework of the EQUAL European Mainstreaming Programme in 2006. This initiative brought together DPs from **Finland, France, the Netherlands and Sweden** and members of the Intercultural and Diversity Group of the European Broadcasting Union (EBU) to develop a **Diversity Toolkit for the Media**, especially for use in television. The Toolkit concentrates on the representation of ethnic minorities and their portrayal in news and current affairs programmes. It is aimed at journalists and teachers and students of journalism but it also provides information for HR departments and the management of broadcasting organisations. In November 2007, the Toolkit was presented in Paris at an international conference on *Integration and Diversity*, organised by France Télévisions and UNESCO, and at the EQUAL conference on *Acting against Ethnic Discrimination in Employment*.

### Combating discrimination is a cross-cutting task that must be reflected in local and regional policies

Fragmented action without effective communication between the key local or regional bodies has very little effect on the situation of groups that are exposed to racist and xenophobic discrimination in the labour market. Much greater impact can be achieved when structures and processes that have a role in preventing this discrimination integrate their different measures into a comprehensive strategy which engages all the actors involved in a given territory's economic and social life and seeks to develop a climate that is conducive to change. EQUAL's focus on the Principle of Partnership fostered such strategic approaches.

EQUAL experience demonstrates that **local and regional authorities** are particularly well placed to coordinate responses to the range of problems that undermine the precarious situation of ethnic minorities, which is marked by language deficits, lack of recognised qualifications, housing problems and gaps in intercultural communication between the indigenous society and immigrant communities. Almost no other single group of actors has a greater capacity for leadership and for the pooling



of resources in this field. EQUAL has shown how this capacity can be used to design initiatives that adopt an integrated approach and mobilise all relevant public and private actors in their implementation.

Involving different actors in a comprehensive territorial approach to improve the vocational integration of immigrants was a strong feature of the ALBuM DP in Germany. In Hannover, **ALBuM** has established a sustainable network connecting local minority organisations, training institutions and the municipal administration which provides new opportunities for training and qualifications for immigrant workers. All of these players were brought together under the slogan "Living intercultural strengths together". The new training, which combined theory and practice in enterprises, made it possible for migrants to qualify as "foreign trade specialists" and "intercultural advisors". The network also assisted with organisational development and the skills-upgrading of workers in companies run by members of ethnic minorities and companies with multicultural staff. It offered advice and training to employers, employees and their representatives enabling them to prevent, or cope with intercultural conflicts. All these activities are integrated into the City Administration's approach to developing a "local integration plan".

Such initiatives require a clear commitment from different departments and effective coordination between them - examples illustrate that where these conditions have been met, local or regional authority leadership has been a very strong factor in delivering a programme of comprehensive territorial action. In other cases, similar results have been achieved when the relevant authorities played a major proactive role in initiatives that were managed by other key local or regional actors with experience and a track record of networking.

For more information please see "Increasing the Participation of Migrants in Employment: Good Practice and Strategic Lessons from EQUAL". [http://circa.europa.eu/Public/irc/empl/equal\\_etg/library?l=/etg1/04\\_examples/increasing\\_participation](http://circa.europa.eu/Public/irc/empl/equal_etg/library?l=/etg1/04_examples/increasing_participation)

### Guidance and placement services must cater to the specific needs of minority groups

Existing mainstream services are not always well equipped to respond to the needs of immigrants and minority groups and, even for a native person, it is often difficult to understand which service can help with which problem or issue. In addition, the initial contact often has to be made by telephone and this can create an extra difficulty for a person who is not fluent in the language of the "host" country.

***Migrants and members of ethnic minorities continue to encounter many inequalities on the labour market. They have a much higher risk of unemployment, receive lower wages, are significantly over-represented in the least desirable jobs and find difficulties in acquiring and updating professional skills and qualifications.***

***Therefore, greater efforts have to be made to improve the employment situation of “third-country nationals”. Similar action is necessary to help Roma, Gypsy and Traveller communities with their vocational integration. These communities often include members with EU citizenship and others with different, non-citizen statuses and together they have to face the greatest degrees of exclusion and the highest levels of discrimination, which explains the fact that their unemployment rates range from over 50 to 90 percent.***

***EQUAL Development Partnerships (DPs) piloted approaches to assist the integration of these groups into the labour market by offering support and services that had not previously been provided by the existing systems.***

EQUAL has demonstrated how this issue can be successfully tackled, by complementing the statutory services, by ensuring that members of the services' staff are training in intercultural communication and/or by providing multilingual information and advice.

The German ***KUMULUS-PLUS DP*** in Berlin devised a new network for intercultural guidance and labour market integration that used differentiated approaches to reach out to the different immigrant communities. This network complemented the limited experience and resources of the public services in this particular field, as the DP's guidance counsellors acted as mediators between the public services and these communities and provided individual coaching for their immigrant “clients”. Most of the 11 partners in the network were NGOs, including immigrant self-help organisations, but the DP also involved other actors working in the social economy and in the private sector. Each member offered a particular type of experience which complemented that of the other partners, such as the capacity to communicate with different immigrant communities in their mother tongue and/or expertise in a specific field. Thus, the network provided a comprehensive and coherent package of services that none of the partners could have offered on their own.

Members of **Roma communities** have to cope with an accumulation of difficulties in their everyday lives. Often they have inadequate or very basic living conditions and restricted access to education, the labour markets and social and health services. They also lack channels to enable their effective participation in society.

The Czech ***POLIS*** project was launched as a pilot programme in the cities of Plzeň, Ústí nad Labem and Bilina to deliver a comprehensive package of counselling and support for people in danger of social exclusion, most of whom were Roma. POLIS coordinated the services of those local bodies which were in regular contact with such vulnerable people, and these included social welfare departments, education authorities, housing departments, employment agencies, NGOs and also the police.

The project assisted in the design and implementation of municipal policies to improve the living conditions of marginalised groups and to halt, and if possible reverse, the gradual decline of certain areas into social ghettos and slums. In parallel, the DP attempted to dismantle the discriminatory practices impeding access to employment. This involved close cooperation with employers and intercultural training and awareness-raising activities for employees of the relevant local bodies. The DP also provided support services and educational programmes to motivate and empower disadvantaged people.

The Spanish ***Lungo Drom*** project adopted a holistic approach to the needs of Gypsies. The Integrated Territorial Centres that it piloted in four different regions of the country offered a range of activities designed to help “new citizens” to adapt to life in Spain and these included language learning, guidance and counselling and the provision of pre-vocational training in aspects such as computer literacy and communication and social skills. In addition, the centres supported the creation of social enterprises or other entrepreneurial developments based on the traditional activities of the Gypsies or on new forms of ethnic or bi-cultural businesses. Help and assistance were also given on the very important matters of health and housing. Finally, in the city of Seville, a Reconciliation Centre was established which operated a crèche for children up to the age of three and also looked after older children at the end of the school day. This enabled both of the parents of each child to take on full-time or part-time jobs.

Evidence from EQUAL builds a strong case for establishing new forms of inter-agency cooperation through which existing resources and facilities can be combined to ensure contact with minority groups and their subsequent access to the labour market and to the educational, health, social and other services that they need.

### **New ways of assessing competences and skills are needed to validate existing qualifications of migrants and ethnic minorities**

In most EU Member States, the qualifications of third country immigrants are not formally recognised and, because their potential is not perceived by employment intermediaries and the business world, many immigrants have to accept jobs which require a level of skills below the qualifications that they had originally obtained. As a result, they experience a process of de-qualification which might ultimately lead them into social deprivation and poverty.

EQUAL has found solutions to this problem by ensuring that employment and training intermediaries, relevant multipliers and immigrant workers are well informed about how to navigate through the complicated web of administrative regulations that hinder the recognition of qualifications. DPs have also piloted flexible ways of ascertaining, profiling and validating immigrants' skills and these new approaches are now being made available in a broader context.

The Austrian ***InterCulturExpress*** (ICE) DP developed information modules on questions related to the validation or recognition of the qualifications of immigrants obtained outside Austria. It then designed a programme of one-day workshops for experts, counsellors and other multipliers to transfer knowledge about regulations and procedures concerning the recognition of educational achievements and vocational qualifications. These workshops also covered a range of related topics such as inter

***“Cooperation between NGOs and the job centres should be obligatory. As many of our clients have no trust in public agencies, we can act as an intermediary.”- Özcan Ayanoglu, Turkish Union in Berlin.***

cultural counselling, anti-discrimination strategies and diversity management. Over 500 multipliers participated in the 30 workshops and more than half of them were of migrant origin. A recognition and further educational counselling centre for new immigrants was opened in Vienna, in summer 2007, and decentralised independent “competence/validation centres” are now being set up to validate qualifications and competences which have been acquired in a formal or informal way.

The German *MigraNet* DP developed a Skills Assessment for Migrants tool that could be used by migrants as a checklist to explore, assess and document their individual skills and potential. It was designed to help individuals to collate information on the skills and competences that they had acquired throughout their life through formal or informal learning and experience in places such as the family home, school, work and the neighbourhood. The tool is now available both in print form and as a PC-application and can be downloaded from a special website which also provides detailed background information and instructions for its use. Advice is offered on complementary training and learning opportunities in order to help users of the tool to develop and obtain accreditation or certification of their vocational qualities.

Experience from EQUAL demonstrates that the introduction of new validation methods and assessment tools can be an effective strategy to help employers understand the potential of immigrants and to make a better match between their offers of employment and the real levels of competence of members of this latent workforce.

#### **Tailored training taking account of migrants’ and ethnic minorities’ skills can pave the way to new employment opportunities**

EQUAL experience has highlighted that further education programmes which build on the existing qualifications of minority groups can open up new chances of employment and career progression for them, especially in jobs that require intercultural competences. Examples include new courses that prepared immigrants, who held a relevant qualification, for work as intercultural counsellors or mentors, or for setting up their own businesses.

The *B-Equal* DP (Bradford Equality Employment Project) in the UK operated in an urban district hosting the largest Muslim community in Great Britain. Members of ethnic minorities in the area faced severe problems of unemployment, even if they were highly qualified. The project set out to improve the chances of employment for these groups by offering them specific training and qualifications related to job requirements in different vocational fields, alongside other activities aimed at motivating employers to consider job applications from those who had participated successfully in these programmes. More than 1.500 immigrants took part in the project and over 1.000 of them found new employment or were secured in their jobs, whilst others are on the road to establishing sustainable businesses.

DPs that worked with Roma stressed the necessity of understanding the identity and mind set of this minority group if progress in creating employment was to be achieved. Their message is that training offered to Roma people must be designed to take account of their manual or communication capacities, of their wish to work in the open air where they could move around and, of course, of the employment opportunities in the locality. While EQUAL trained and helped Roma people to find permanent jobs in the normal labour market, it demonstrated that this training



*IT training course - learning to make contact over the internet.*

approach was also successful in setting up social enterprises and in helping people to become self-employed or to work from home. Often, the training aimed to enhance some of the interests or traditional, but unrecognised, skills of Roma such as dress making, forestry or various agricultural pursuits. This subject-specific training was then backed up by additional training in literacy, numeracy and IT skills and, where self-employment was concerned, help was offered with the relevant administrative and financial procedures.

In a very rural region of Hungary, the *BRIDGE* DP provided on-the-job skills training for Roma people. These individuals learned whilst they built workshops for the project to enable all of the participants to search for opportunities to move towards some form of more permanent employment. The concrete outcomes included the setting up of a Carpenters’ Workshop and a Blacksmiths’ Workshop. These workshops received the various formal inspections that covered not only building control but health and safety regulations and they were licensed to operate in mid-2007. Having completed their training and having finished the equipping and decorating of the workshops, the craftsmen exercised their new skills and gained more practical experience by renovating the dilapidated homes of local families that had nobody in employment and that were thus completely dependant on social benefits.

Existing vocational training courses rarely respond to the needs of Roma and new immigrants. EQUAL has shown that new training content and methods are required that are adapted to the culture, traditions, skills and level of qualification of these groups. This training should also further their social and vocational integration by making provision for the acquisition of basic and IT skills and, particularly in the case of immigrants, for knowledge of the language and working practices of the “host” society.

*More information and detailed examples of successful approaches are contained in the document “Increasing the Participation of Migrants in Employment: Good Practice and Strategic Lessons from EQUAL.” This may be found in the Employability Section of EU Thematic Activities on the European Commission’s EQUAL web site. [http://circa.europa.eu/Public/irc/empl/equal\\_etg/library?l=/etg1/04\\_examples/increasing\\_participation](http://circa.europa.eu/Public/irc/empl/equal_etg/library?l=/etg1/04_examples/increasing_participation)*

**EQUAL identified successful ways of changing the mindsets and improving the conditions that allow under-represented groups to start a business. There are five ways to stimulate entrepreneurship:**

- **Ensure that the benefits system allows an affordable transition from welfare benefit to earning one's own living.**
- **Ensure that regulatory barriers to becoming an entrepreneur are as low as possible and that administrative procedures can be completed in a matter of days.**
- **Promote an entrepreneurial culture by:**
  - **Preparing young people by introducing an entrepreneurial culture in educational curricula;**
  - **Encouraging communities to become more enterprising;**
  - **Promoting role models and mentors.**
- **Deploying an integrated policy for social enterprises.**
- **Stimulating local employment development by the provision of 'neighbourhood services' promoting access to work.**

**Transition out of the benefits system is a crucial step**

One of the first findings of EQUAL in the field of entrepreneurial culture has been the necessity to bridge the two-way information gap that often exists between business support systems and potential entrepreneurs from disadvantaged groups and areas. EQUAL revealed the importance of obtaining first-hand knowledge of the real obstacles these groups face, and indicated ways to build trust and provide more reliable information to them.

Welfare benefit systems can unwittingly deter people from making the leap into earning their own living, by making income support conditional on being available for work. Schemes such as Enterprise Allowance, under which unemployed entrepreneurs could retain their benefit while testing their business idea, have enabled many people in Britain and Ireland to set up on their own. Similar schemes also exist in France (*ACCRE: Aides aux chômeurs créateurs ou repreneurs d'entreprise*), Germany (*Gründungszuschuss*) and Portugal (*PEOE: Programa de Estímulo à Oferta de Emprego*).

In France, EQUAL has helped to build a more structured pathway out of benefit dependency. Business and employment co-operatives (*coopératives d'activités et d'emploi*) offer new entrepreneurs both peer support and a chance to try out their business idea without having to renounce their income safety net. By joining the co-operative, they receive a guaranteed income: as their own earnings rise, the benefit component tapers off. And the co-operative takes care of the tax and official paperwork.

**Regulatory barriers need to be lowered**

EQUAL promoted extensive research undertaken by providers of business support services in order to acquire better intelligence about the barriers, the specific business support needs, profiles and opportunities of disadvantaged groups, governmental of-

fices and provision of support services and sectors such as the social economy.

The outcomes of this research led to adjusting lines of action in order to:

- Reduce the major hurdles faced by disadvantaged people and by all those in the submerged economy when trying to move from social security benefits into self-employment.
- Adapt the delivery of business support procedures to the needs of under-represented groups.
- Train both specialist and mainstream business advisers to take the differences between potential entrepreneurs into account.
- Allocate more resources to business support programmes and schemes targeting under-represented groups (up to 30% of the budget for entrepreneurship).

**Entrepreneurship implies a broad set of attitudes and competences which can be applied to all walks of life.**

Business start-ups have been shown to increase by up to 20% a year in regions where the above approaches have been implemented.

**Entrepreneurship relies on cultural attitudes**

EQUAL highlighted a common feature of business support policies; that is the need to go beyond the narrow definition of entrepreneurship as a set of technical skills such as book-keeping and marketing, which is only useful to private businesses. It confirmed that entrepreneurship implies a much broader set of attitudes and competences such as team working, decision making, risk taking, innovating and so on, which can be applied to all walks of life. Linked to this approach, EQUAL experience raised the ever growing need to integrate entrepreneurship training into all stages of the educational system.

**Education plays an important role**

Several EQUAL projects have put entrepreneurship education at the forefront of their initiatives testing new methods of developing entrepreneurial capacity, focusing on the needs of under-represented groups like women and people living in deprived areas. Imaginative methods for "learning by doing" like, for example, turning the whole classroom into a co-operative which trades internationally with other classroom co-operatives from different European countries was one of the key principles of an EQUAL project led in Valnalón (Asturias, Spain).

The **K'CIDADE** project in Portugal, promoted by the Aga Khan Foundation, is a long-term pioneer project testing a new methodology for building entrepreneurial capacity to help people to take control of their own lives and escape social exclusion.

The long-term approach the project takes in addressing causes and not just symptoms is reflected in its education dimension. The Childhood Association develops entrepreneurial skills by training teachers in more active models of education (**EDUCARE**) so as to improve the autonomy, creativity and responsibility of children, their families and teachers. Children enjoy themselves while they are taught to investigate, to mobilise resources and to pursue their own interests.

The Portuguese government would like K'CIDADE to expand beyond the Lisbon area from 2009 and the Portuguese Prime Minister, José Sócrates, signed a protocol with the Aga Khan Foundation in December 2005. As a result, the Ministry of Labour and Social Solidarity was able to invite K'CIDADE to provide training to social workers from the Lisbon district and to consider expanding its work to other areas of the country.

#### A community-based approach improves confidence

Convincingly, EQUAL experience also shows the importance of building on the positive mood change and increased confidence emerging from community mobilisation. Work can then be undertaken successfully to support business development.

The **SIED** EQUAL project in North London illustrates this radical community-based approach. It identifies a member of a community-based refugee or ethnic minority association and trains him or her as an accredited business adviser. It has trained 45 advisers and recently saw its 1 300th client. In order to continue the work beyond EQUAL, a new grouping named the Association of Community Based Business Advisers (ACBBA) has been established. It provides support services and training to advisers based in the community. ACBBA is already active in five boroughs of London and is looking to win contracts elsewhere.

#### Communicating through role models raises visibility

Another effective EQUAL experience is the way some governments raised the visibility of inclusive entrepreneurship - access to business by everybody - by creating a special event. This is the tactic behind the UK's Social Enterprise Day, which occurs in mid-November each year. It forms part of Enterprise Week, and from 2008 coincides with the first Global Enterprise Week, and involves more than 60 countries. This is fully in tune with the EU inclusive entrepreneurship agenda, and describes itself as "a worldwide celebration of enterprise, which aims to unleash young people's enterprising ideas and address some of society's biggest issues, from poverty reduction through to climate change". The linked [Make Your Mark](#) campaign website uses the power of example by featuring a number of 'inspiring stories'.

The European Commission also directly promotes role models of inclusive entrepreneurship. The Enterprise DG sponsors the [European Enterprise Awards](#) which were initiated in 2005 to reward outstanding initiatives that support entrepreneurship at the regional level. It has attracted a lot of interest, with over 300 entries in 2007, and inclusive and social entrepreneurship initiatives score well. In 2007, *Ethnic coach for ethnic entrepreneurs*, of Vejle in Denmark, received the special award as an entrepreneurial trail-blazer. This category recognises "actions that promote an entrepreneurial culture and mindset and raise awareness about entrepreneurship in society". *Eigen Werk*, which encourages entrepreneurship in over-45s in Amsterdam, was runner-up in the "investment in people" category.

#### A social enterprise strategy calls for coordinated government action

As well as motivating disadvantaged individuals to give enterprise a try, governments need to ensure that their own services are supportive of such efforts. This means that the ministries and agencies dealing with business, work, poverty and the environment need to overcome isolationist 'silo' thinking and work effectively together to promote entrepreneurial solutions to social



More than 6 000 Lisbon residents have been mobilised and 28% of them were actively involved in K'CIDADE's activities.

problems. EQUAL's national thematic networks in **business creation** and the **social economy** brought the issues to the attention of governments.

The UK government's Social Enterprise Strategy shows how a co-ordinated approach from the centre can create "joined-up government". Adopted in 2002, the strategy addresses the regulatory framework, access to public markets, finance, skills, statistics, impact measurement and public awareness. It has resulted in a newly confident sector comprising some 55 000 businesses turning over €40 billion and contributing €12 billion a year to GDP.

#### Local employment initiatives can provide tailor-made measures

Local employment initiatives piloted by EQUAL provide tailor-made measures which often go beyond business support policies.

In Poland the **Nowa Huta–Nowa Szansa** EQUAL project supported twelve local organisations to experiment with a new way of incubating new businesses, known as 'integration factories', with a particular desire to help young people. The project made use of the strong local work ethic, which has been frustrated by the steelworks closures, and the social capital that comes from having worked as a team. It targets people who already have some professional career ambitions yet are facing exclusion from the labour market. There are four particular groups: young people with a basic education, disabled people, 17-23 year-old benefit recipients and unemployed people with no benefit entitlement.

"We are convinced that financial capital is not the only sort of capital that is required," says the project co-ordinator. "Our method builds human capital and social capital as well, and both of these are key assets for the development of Nowa Huta and its people." The project nursed into being around a dozen businesses which meet social needs and provide a livelihood for their workers.

#### Activate communities through neighbourhood services

In addressing the question of activating excluded people and improving the quality of their lives by creating neighbourhood services, the **Werk.Waardig** EQUAL project in southwest Flanders tackled persistent long-term unemployment on a housing estate in Kuurne, near Kortrijk. The project firstly surveyed residents to discover what problems they faced. Then, using empty retail units, it set up an after-school club and a flexible childcare centre which allow single parents to attend interviews and hold down jobs. It also opened a canteen featuring a computer with internet access which enables residents to mix with each other, break out of their isolation and find work-related information. The scheme has created 70 jobs which, unlike the informal economy, can offer market wages and conditions thanks to an effective 70% subsidy from the national service voucher scheme.

**Entrepreneurs come in all shapes and sizes, and business support needs to reflect that variety. The way to bring opportunity to all parts of society is for business support agencies to make links with organisations in the community and work through them, as well as offering a sensitive reception themselves. By forming a support network, advisers can create a structured business support pathway that is tailored to each person's needs.**

**Business support services link their offers and get closer to the client**

Potential entrepreneurs often struggle to access a chain of appropriate support to take them from start-up to the consolidation and growth of their new enterprise. Business support systems run the risk of being either too specialised or too generalist. EQUAL confirmed that there are innovative ways of linking or 'braiding' support services from different providers to supply full and coherent business support itineraries to vulnerable groups.

**EQUAL has exposed the need for fundamental changes in traditional business support methodologies.**

One of the most important messages from the experiences of business support initiatives in many European countries over recent years has been that supporting business start-ups is not the same thing as supporting successful businesses. EQUAL showed the relevance of helping new entrepreneurs to access mainstream business support services on one hand while bringing mainstream services closer to disadvantaged groups on the other. Business support services are frequently desk and office bound. Only the clients that are most confident and aware of what is on offer are reached, as the service is largely reactive. The service therefore needs to meet its prospective clients on their ground.

Social enterprises are an area where specialist support pays dividends. In Italy, the EQUAL **Quasar** project was the fruit of a national partnership between consortia of social co-operatives and the chambers of commerce. The latter had previously not known how to serve the needs of social enterprises, and were anxious to enter this growing market. The partners set up observatories in eight towns, from Milan to Bari, and set up seven specialist working groups combining experts from the third sector and from the chambers. These tackled issues such as social services reform, social quality, training, finance and local development, and produced an impressive series of guidance manuals. Advisers carried out check-ups on 240 companies and trained the business advisers. Social enterprises emerge with a stronger identity, legal recognition, strengthened management skills, and a steadily growing regional support network. Fresh towns are now keenly following suit.

**Pathways through business support need to be structured**

The development of business support itineraries recognises that there are various stages to the development of a successful, sustainable business and that support is needed at each of them. The EQUAL experience shows that a model comprising between five and six stages works best. Whatever the precise way the process of providing business support is broken up, it should contain the following elements:

**The right components of support:**

- an induction phase that includes careful profiling (e.g. initial

assessment of areas of weakness and the overall chances of success of a potential start-up);

- training that is relevant to the life situation of the individual entrepreneur and builds on human resource development techniques;
- qualifications that are relevant to practical needs, such as computing and accountancy;
- home learning materials (written and online);
- access to the real world of business, through mentoring from experts in the field;
- aftercare in the form of coaching;

**Sourcing different components from the best providers:**

- a support system that is anchored in a local network of actors from the administration, business, associations and community groups.

**A tool for control, transparency and portability:**

- An "enterprise passport" to document individual progress.

The **German Association of Start-up Initiatives** (VDG) developed a four-stage business development model based on experiences from EQUAL projects. Each of the four stages – profiling, planning, start-up and consolidation – has a fixed duration (from 4 weeks to 5 years) and different services – including counselling, training, mentoring and support in accessing micro-credit – are provided at each stage to help the entrepreneur acquire the personal competences, skills and resources necessary for success.

As part of this, **Verbund Enterprise** developed the Enterprise Passport (*Gründerpass*) which enables quality control and tracking to be exercised, even over a tailored support package which bundles together a varied range of services delivered by a number of different organisations (grassroots youth organisations, mainstream business advisers and financial institutions). It provides a clear and transparent road map of the progress made by the entrepreneur at each stage. A specific internet-based database program is used to display the passport's structure and contents digitally. This enables users to plan, accompany, document and evaluate the start-up process over the four phases on an ongoing basis – independently of time and place. The system can be used to manage communication via mail and e-mail between the various partner organisations, the business starters and other external institutions. It also delivers statistical data on business starters, services taken and the different phases.

**Disadvantaged groups need accurate information**

To reach disadvantaged groups such as long-term unemployed people and migrants, and to support groups that are under-represented in enterprise such as women, proactive techniques (so called outreach methods) are needed, otherwise enterprise remains the preserve of the advantaged and those born into it. People who are not reached by specialists who can communicate the knowledge in a clear way are dependent on informal sources of advice usually developed through the social capital of family and friends. However, these can be a source of misinformation and lead those groups, especially when relatively recently settled, to trade illegally and be at risk. Good quality support and advice in the early stages can mitigate this risk. Working with people who are excluded requires that a trust relationship is built. This calls for more sensitive inter-cultural and inter-gender behaviour and empathy with the situation in which clients find themselves.



The **EMERGE** project in Ireland worked to help ethnic minority entrepreneurs break out of their niches and access mainstream markets. The project sought to provide ethnic minority entrepreneurs with the information they needed to reach a broader market. It built links with mainstream business networks, for example by inviting ethnic minority entrepreneurs to networking events and mainstream business information sessions. Together with the Small Firms Association (SFA), one of the main representative bodies for SMEs in Ireland, the project visited small towns all over the country offering short information sessions. From these information exchanges, it found out that banks needed to deliver clearer communication on how to get loans, to get assistance from translators and to see their clients more as individuals. The project engaged with mainstream financial institutions to improve their understanding of the potential and needs of ethnic minority entrepreneurs. The enthusiasm which EMERGE participants have shown in the pre-enterprise stage convinced the Bank of Ireland to put together a loan package scheme to support ethnic minority entrepreneurs who wish to set up in business.



Anja Witte from Parkaus in Berlin.

### Quality standards exist for training and mentoring new entrepreneurs

EQUAL has found that the various integrated support systems need to define common methodologies and, above all, recognised quality standards, indicators and benchmarks that take account of diversity by breaking down the data to the level of the disadvantaged groups. In the UK, this has been applied to produce officially recognised standards and monitoring procedures for business mentors.

By adding 'social inclusion' to the quality criteria applied to business services, EQUAL has exposed the need for fundamental changes in traditional business support methodologies. For example, more accessible and flexible business planning tools may better reflect the more gradual, organic way in which many women and ethnic minorities start businesses. However, to ensure that these methods are not restricted to specialist support services, training packages on diversity have been developed and disseminated through targeted information campaigns to business advisers in regional and local agencies. They are now extensively used at national and regional levels for a broad range of disadvantaged groups.

### Incubators and workspaces are important vehicles of social innovation

A business incubator is usually a property with small workspace units that provides an instructive and supportive environment to entrepreneurs at start-up and during the early stages of the business. Recent approaches to incubation have started to apply innovative techniques to supporting enterprise in disadvantaged areas, self-employment and social enterprise.

In France, such an approach has led to the creation of a network of *coopératives d'activités et d'emploi* or **business and employment co-operatives** (BECs), supported through the Créative EQUAL project. They have even crossed the border into Belgium and spread to Sweden, Morocco and Quebec. The network includes over 90 active BECs and employs 2 200 salaried entrepreneurs turning over €31 million. Two-thirds of them started off as unemployed, two-thirds are aged between 30 and 50 and 53% are women.

BECs offer potential entrepreneurs the chance to create their business within the sheltered environment of a larger social enterprise. In France, they have the advantage that they can start out and keep their unemployed status until they have completed a test trading period and their business is ready for launch. In this phase any revenue to the business can be spent on projects for the business-

for example marketing. In the second phase the entrepreneur becomes a salaried employee of the BEC which in return receives 10% of sales revenue. The 'salaried entrepreneur' benefits from training and administrative support. Once established, the entrepreneur can either spin out or become a full voting member of the BEC and continue to pay a 10% administration charge.

### Work integration social enterprises (WISEs)

A social enterprise is a firm carrying out economic activity like any other firm, but the profit made serves social goals. Exploring social enterprises, EQUAL findings confirm that this rapidly emerging trend in Europe represents a sector playing a particularly important role in work integration, addressing some of the more difficult problems of exclusion from labour markets. This form of social enterprise, also known as WISEs and social firms, has proved to be an effective innovation in addressing the problems of more marginalised groups and individuals.

WISEs exist across Europe in various legal forms – with the most outstanding one in Italy, where there are more than 2 500 work integration social co-operatives.

In Finland, the **Pirkanmaan Syke** project created more than 30 social enterprises to tackle skills shortages in the industrial area around Tampere, by taking the red tape out of the recruitment process, and making it quick and easy to find the right employees. It actively marketed the option of employing long-term unemployed and disabled people to fill vacancies. Working from a town-centre business advice agency, with seven advisers distributed among its partner organisations, Syke used professional marketing techniques to identify companies looking for motivated workers. It then has at its disposal a subsidy scheme that can reduce the wage bill by as much as 40% in the case of a long-term unemployed disabled person.

In Greece, the social co-operatives known as KoiSPEs are an important tool in the deinstitutionalisation of the mental health system.

In Sweden, social co-operatives have scored a major success in integrating ex-drug users into society and the workforce. The **Basta** and **Vägen ut!** projects show that combining a worker co-operative with a therapeutic community can prove an extremely cost-effective integration method. Taking into account the various savings that society makes owing to their activity, the co-ops turn in an astonishing social profit of as much as €110 000 per employee per year – 50 times higher than their nominal business profit.

**Access to finance is a universal obstacle to business growth and business start-ups, especially for people with difficulties accessing the labour market. Effective approaches to financial inclusion arise from a mix of governmental action, commitment from the banking sector and an engaged social sector. For instance, microcredit provides accessible small loans. Although different countries require different approaches, successful initiatives allow conclusions to be drawn on effective policy approaches. Beyond financial literacy, financial advice and financial products, innovative tools such as social return on investment and social auditing show valuable paths for successful inclusive entrepreneurship.**

**Innovative ways to analyse financial and business needs exist**

Through benchmarking and research, EQUAL demonstrated how important it is to find out about the real - rather than the assumed - financial and business needs of disadvantaged groups. Given the financial and social insecurity some disadvantaged groups are facing, actions that might jeopardise any of their sources of income such as paid work, social security or informal work are to be avoided. A shift is required from simply selling a specific financial product to adjusting both products and services (based on solid experience of or research into the target groups) so that they genuinely help to increase income flows and the ability to repay loans.

Research by EQUAL projects, such as **AWE** in the United Kingdom, shows that many women prefer to set up businesses in a relatively tentative manner, requesting significantly smaller loans than their male counterparts (as low as €650 in some cases). Other significant barriers affecting women are the exclusion of part-time businesses and certain traditional sectors, low levels of benefits disregard and traditional risk assessment criteria.

**Legislation is an essential lever to facilitate inclusive entrepreneurship**

In several European countries, EQUAL findings showed that laws are becoming more accommodating, for instance as regards tax regimes which facilitate the transition from the informal to the formal economy, the extension of unemployment benefits dur-



*Horticulture is a money-spinner for Greece's first 'KoiSPE' – co-operative for people with mental health problems – on the Aegean island of Leros.*

ing the early stages of starting a business, or the interpretation of banking regulations.

Among the many examples brought forward by EQUAL, the Greek legal entity called KoiSPE (limited liability social co-operative), which the Synergia project helped to launch, provides for corporate bodies to buy investment shares. This allows local authorities and hospitals to inject working capital into new enterprises employing ex-mental hospital patients.

In mid-2008, the British government announced proposals to liberalise credit union legislation that will make them more effective micro-finance organisations. The proposed regulation allows corporate bodies and groups, as well as individuals, to become members. This means that

local small businesses, community groups and co-operatives can pool their financial reserves, take out low-cost loans and recirculate income within the community, making them an invaluable tool for local, social and economic development.

**Innovative ways of organising loans can boost entrepreneurship**

Rather, it is ways to control risk that are the thorniest problem. In addition to using guarantee schemes, EQUAL has demonstrated three ways for financial institutions to deal with risk. The first is to replace money guarantees with a detailed knowledge of the person and the viability of the project, and to simplify the documents required for business plans and applications. The second method is to replace individual guarantees by guarantee communities, in which each member guarantees only a small fraction of a loan. For instance Triodos Bank makes use of borrowers' social capital by asking them to assemble a community of 100 supporters, each of whom will guarantee 1/100th of the loan. Thirdly, the technique of peer lending enables small groups of people, well-known to each other, to take joint responsibility for loans. Each group member can support the others and help solve any difficulties, and the sense of collective responsibility this technique engenders makes default very rare.

Many of the same schemes also favour "step lending" starting with relatively small loans, which, once repaid, are renewed for progressively larger amounts.

**Microcredit brings confidence**

In the field of microcredit, a **European study** reveals that average sums lent are around €5 000 with relatively few schemes over €15 000.

Support for microcredit through EQUAL initiatives shows that it improves business survival rates. In addition, there is the change of mentality, confidence and capacity in people who start to feel that they are serious "clients" of a financial institution rather than the beneficiaries of social support.

Europe's most experienced micro-lender, **ADIE** (France), used microcredit as a tool to enable informal traders to join the official economy. It distinguishes three types of informal activity. The first

type of client is typified by women who are involved in traditional activities in a sporadic way, making the most of opportunities when they arise at the weekend or in the evening. In these cases the informal activities represent less than 10% of their total income. A second category of people work informally for around ten hours a week to provide a small but regular complement to their other sources of income. Finally, for some people, informal activity has become or is close to becoming the main activity, taking up more than 80% of the time and bringing in a third of their income.

While all three groups increased their income as a result of a microloan from ADIE, only the third group, along with a few of the second group, had a strong motive for leaving the informal economy. The project therefore introduced three innovations that proved very successful with this group of clients:

- to use word-of-mouth channels within ethnic networks in order to reach out into minority communities;
- to develop a tailor-made blend of step and peer lending techniques: loans are made to peer groups of three people, and usually start very small, at around €1 000, but once they are repaid they can increase in small steps up to €5 000;
- to design a support package involving both individual and group modules on financial capacity building, which cover household budget management, the risks of consumer loans, calculating income and expenditure, stock and cash flow management and so on. The package also includes games on stocks and margins and how to manage one's personal budget. Additional modules were designed to help the clients to plan their business and assess the risks and benefits of becoming self-employed or registering a business.

#### Delivering finance to hard-to-reach communities is possible

EQUAL also showed that effective marketing and outreach is essential to deliver finance to disadvantaged groups.

In Spain, Un **Sol M6n** has been able to build up a better understanding of the financial needs of gypsy and other ethnic minorities through close discussions with social services and a personalised programme of advice carried out by project partners. This allows their clients to present a viable plan for income earning activity, however modest. The financial services offered can then be more closely matched to the real situation. However, in this case, the lack of solid community networks among the users means that progress is slow. Many observers have found that it can take at least a year to build up the relationship of trust required for lending to take off within hard-to-reach communities.

#### Thinking in terms of investment

One important way of persuading financial decision-makers, whether in the public or private sector, to loosen their purse-strings is to show them clearly what the benefits of investing in inclusive and social enterprise projects are. EQUAL has piloted a number of techniques for assessing which stakeholders benefit from such investments, and to what extent.

Social auditing or social accounting is a technique that has been pioneered in the social economy but can be used by businesses of all types as well as the public sector. Social auditing is



AWE – left to right: Marina James and Sue Irving.

a method for organisations to plan, manage and measure non-financial activities and to monitor both the internal and external consequences of the organisation's social and commercial operations. It can for instance take into account effective community consultation or improvements in health, confidence, skills, safety and happiness. EQUAL addressed the question of its performance in inclusive and social entrepreneurship, mostly in the rural areas of northern Europe, for instance in **Scotland** and **Finland**. The watchwords are that the process should be multi-stakeholder, comparable, regular, versatile, learning-oriented, auditable and transparent.

A more rigorous technique, social return on investment (SROI) allows values and benefits that are often overlooked to be brought into the financial calculation. The process of calculating the social return on investment starts with carefully considering who the key stakeholders are and what the indicators of success are. This process results in an 'impact map' which shows how its activity converts inputs such as funding into impacts of various types for various stakeholders. These impacts can then be monetised and presented in the form of multiannual projections. From this, one can use standard accounting tools to calculate a discounted cash flow, and the net present value (NPV) of the investment. From the policy-maker's point of view, SROI has the attractive feature of providing a single easily-digested measure of the benefits of a policy choice.

EQUAL's focus on social return on investment (**SROI**), a technique for capturing in a more holistic way the various types of impact that public programmes have, showed interesting outcomes in Austria, where the **Chance B Hausmeisters** project, using the SROI method, was found to generate a public profit of nearly €200 000. Three British regions as well as the Dutch EQUAL programme are using this tool, with the important effect of lengthening planning horizons. Similar calculations in Sweden showed returns of as high as 3,000%.

In France, the *bilan soci6tal* is a set of 100 indicators (ranging up to 400) that show how an enterprise impacts on society. In Italy, the *bilancio sociale* is a similar tool which can be used to raise levels of transparency. For instance in the **Agenzia di Cittadinanza** project in Milan, the technique is used to take indirect benefits into account such as the added income generated by the provision of childcare that allows more parents to go out to work. From 2007 it became obligatory for all registered social enterprises (*imprese sociali*).

***New entrepreneurs coming from disadvantaged groups and areas can be lured into an attractive system of grants and cheap loans. If the businesses they set up do not have a strong chance of being viable, the cure can be worse than the illness. It is therefore crucial to help young businesses to survive and to grow. EQUAL piloted several approaches to increase the long-term sustainability of start-ups, whether they are ordinary SMEs or social economy organisations, such as opening up access to public markets, or replicating the business idea through the process of social franchising.***

### Open up access to larger markets

Public procurement contracts in the EU amount to more than €1.5 trillion a year, or 16% of the EU's GDP, and it is clearly important that suppliers of all types and sizes should have a fair chance to bid for them. Yet the procedures can be so complex that small companies simply do not have the time or skills to prepare tenders, and public sector commissioners often do not understand the needs of small firms or the nature of social enterprises that do not have conventional shareholder structures. Changes need to be made on both sides of the procurement equation – supply and demand.

### Use manuals, training and online tools to educate procurement professionals

On the demand side, one part of the change that needs to be made is to educate procurement professionals, and give them the technical knowledge and confidence to use the full potential of procurement legislation. The EU procurement directives do not in fact prohibit social concerns from being taken into account, but EQUAL has shown that there is a serious problem of uncertainty among procurement professionals about how to ensure that the community benefits from the purchasing decisions they take. One basic and indispensable tool for this is the publication of manuals and guidance such as the British Social Enterprise Coalition's *More for your Money*: a guide to procuring from social enterprises, which is available in versions tailored to local authorities and to the health service. EQUAL has also shown the need for training such as that being carried out as part of the UK national programme for *Third Sector Commissioning*, under which *IDeA*, the Improvement and Development Agency, will deliver training to 2 000 local government officers. Online tools are a third string to the bow. An example is the self-tutoring course for local authority officials called *Specification Writing for Community Benefits*. Created by Northampton County Council, it comprises three modules covering, respectively, understanding community benefits, procurement and achieving community benefits.

### Measure the social added value of intelligent procurement

The other side of the procurement coin is to develop ways to measure the social added value that purchasing decisions can achieve.

An array of 22 different tools is set out in the "Proving and Improving" toolkit produced by the New Economics Foundation.

EQUAL piloted a number of approaches to measuring the social return on investment (SROI) of social enterprise solutions in public service delivery. The process of calculating a project's SROI starts with carefully considering who the key stakeholders are and what the indicators of success are. This process results in an 'impact map' which shows how its activity converts inputs such as funding into impacts of various types for various stakeholders. These impacts can then be monetised and presented in the form of multi-year projections. From this one can use standard accounting tools to calculate a discounted cash flow, and the net present value (NPV) of the investment. Calculations show excellent returns from social enterprises in a number of countries: in Sweden, the Basta co-operative, which employs ex-drug addicts, returns a remarkable €30 for every euro invested. The method has been used in Austria, Finland, the Netherlands and the UK and a European SROI Network has been established.

### Increase enterprises' capacity to deliver

On the supply side, the need exists to raise the capacity of social enterprises to find out what market opportunities exist, to write convincing proposals, and if need be work together in consortia. EQUAL showed how useful this capacity

building can be.

The **BEST Procurement** EQUAL project ran a set of 10 seminars in different UK towns on five topics: agents of change & types of change, health markets, influencing the demand side, resource capacity and business effectiveness. But as new enterprises emerge capacity-building needs to continue. To ensure a sustained impact, the project distilled its guidance in *Social Enterprise and the Public Sector*: a practical guide to law and policy. Further north, Social Economy Scotland took a slightly different tack and organised a forum at which public sector purchasers could engage in dialogue with social enterprises about the potential benefits and challenges of involving social enterprise in public service delivery. The World Wide Web enables purchasers to find a wide range of potential suppliers in seconds, and EQUAL has helped to build several online marketing tools for social enterprises. These include *Nearbuyou* in Britain and *Connect* in Belgium.

### Create economies of scale through marketing consortia

In winning larger contracts, scale is an important issue, because without scale enterprises do not have the margin to employ specialist staff to seek out suitable opportunities, prepare and submit tenders and manage the compliance procedures. A number of initiatives have therefore been taken in which social enterprises group together to increase their marketing strength.

In the field of reuse and recycling, social firms such as *RepaNet* in Austria and *ELWARE* in Finland have created international representative and trading structures. In the first stage, 17 member organisations in 10 EU countries, which together represent some 40 000 individuals, joined together to create a European federation called the Re-Use and Recycling European Union of Social Enterprises (*RREUSE*). In order to tap into the potential to sell reused and recycled products on the European scale, some RREUSE members decided to establish a commercially oriented structure. In 2006, 14 social firms spread across five EU Member States therefore founded a European Economic Interest Group, *SerraNet* EEIG. They see the EEIG as an efficient model both for organising the transfer of good practice on a stable basis and for implementing joint business activities in the long term.

Similarly in the sector of social care, Italy's leading consortium of social co-operatives, Consorzio Gino Mattarelli (CGM), federates 79 territorial consortia, in turn comprising some 1 500 social co-operatives employing 40 000 people. CGM has established the Welfare Italia brand which will appear as a trademark in television adverts etc. The initiative promotes social co-operatives as partners with government and private sector that combine solidarity with competitiveness and offer reliable services that meet people's needs and are based on trust

#### Help good business ideas to spread

Buying into a franchise is less risky than starting a stand-alone small business. Many franchise networks find it difficult to find suitable new franchisees, yet barriers persist: only a third of franchisees in Britain are women and the cost of buying into a franchise is a major deterrent. Several EQUAL projects have been exploring methods of extending the take-up of franchising among groups such as women and people with disabilities as well as in sectors like the social economy. Following the example of the CREATE EQUAL partnership, groups facing discrimination in the labour market can derive great benefit from receiving information and support on taking up an existing franchise or creating a new one. The project's direct advice, training workshops, web-based tools and nationally recognised business advice standards have proved invaluable.

EQUAL also showed how successful business ideas can be spread without the use of formal franchises. Following the model of the ARIADNA project in the Spanish Basque country, established and experienced co-operatives take a share in new start-ups, together with the promoters of the new venture and a business support agency. After a period of advice and mentoring, the owner-workers of the start-up increase their share in the business, while the parent firm reduces its holding and the business support agency pulls out altogether. The advantage for the parent company is that it gains a stake in a new market for a lower cost while, at the same time, the new entrepreneurs are able to acquire the experience of the parent company with far less risk.

#### Promote social franchising

EQUAL demonstrated how social enterprises can use the method of 'social franchising' with particular success to set up mutually supportive clusters of businesses in a single sector of activity. This follows the basic idea of franchising, by identifying a business opportunity in advance and codifying it in the form of a handbook, thus reducing the risk to each individual start-up. It often makes enterprise more accessible to disadvantaged people by dispensing with the payment of a sizeable licence fee. The system has been applied in a number of different trade sectors.

Perhaps the outstanding example of the social franchising method to spread social firms is the chain of neighbourhood supermarkets in Germany that trade under the name of CAP Märkte. These 60 'CAP markets' (from 'handicap') now employ over 500 people. They are the fruit of an initiative to establish a national brand of social firms by taking over small neighbourhood supermarkets in suburbs and villages that have been made redundant by the growth of hypermarket. The franchise for these is a co-operative of sheltered workshops, and the shops are mostly run by locally-based social firms providing jobs for disadvantaged people.

The shops typically have a sales area of 500m<sup>2</sup>, stock 7 000 lines and employ 8-12 people apiece, two-thirds of whom are handicapped. They:

- provide jobs for handicapped people, aiding their integration through direct contact with customers
- bring about local regeneration by bringing empty property into use and providing accessible facilities for people without cars
- counter exclusion by offering services such as home delivery of meals or post office services

Meanwhile Le Mat is promoting social firm hotels at European level, and Sunderland Home Care Associates, an employee-owned firm employing some 200 carers, has franchised its model in four other towns in northern England, providing some 450 jobs. The system is held together coherently by reciprocal shareholdings: companies all hold shares in the franchisor, CASA, and it holds shares in them. EQUAL projects in this field have come together to found the European Social Franchising Network.

#### Build competitive local supply chains

There are many niche markets and areas of emerging social and environmental needs which provide important opportunities for entrepreneurship and job creation among disadvantaged groups. EQUAL partnerships have shown that taking a collective and trade-sector-based approach to these opportunities can have considerable advantages over random support for individual entrepreneurs. Examples in EQUAL include design (Belgium), the environment (Spain), sports (Greece), culture and the media (UK and Belgium) and tourism (France). One of the key lessons to emerge from these projects is that the emerging opportunities do not translate automatically into new firms and jobs for disadvantaged groups and areas. It is necessary to take an entrepreneurial approach to the entire supply chain and design an integrated sequence of actions which fits each context. This can involve identifying growth areas and niche markets, business awareness and sectoral skills training, investments in strategic planning, the design of new differentiated products and services, and professional marketing.

#### Make business succession easier

Around one-third of EU entrepreneurs will retire from the labour market in the next 10 years, including significant numbers of those running family enterprises. This will affect some 610 000 companies and 2.4 million jobs every year. Yet experience shows that the chance of survival of a business that is transferred in whole or in part to a new entrepreneur is higher than that of a totally new start-up.

A number of EQUAL projects took up this issue. One of their distinctive contributions is to try to link the retirement of older managers and owners with specific target groups – most obviously young people but also women. For example, the Mail-lâges project in France actively seeks older entrepreneurs who could be looking for a successor to take over their company. It then identifies younger people with the skills or potential to run the business. A partnership can then be established to build the young person's skills and confidence so that they can take the business over. The project also identifies and supports older and younger unemployed people who could form complementary pairs to build new businesses together.

**Europe, along with other parts of the world, is undergoing a process of demographic change. The population is ageing due to a decline in the birth rate below the population replacement rate, the ageing of the baby boom generation, and the increase in life expectancy achieved by progress in medicine and the absence of major military conflict in post-war Europe.**

The ageing of the population poses a number of challenges to the European economy. According to the Commission Communication “The Demographic Future of Europe – from Challenge to Opportunity”, the share of the working age population (15-64 years) is set to decline by 48 million between now and 2050. Even if the objective of a 70% overall employment rate, as set out in the renewed Lisbon Strategy was met, one would still see a decrease in the total number of people in work by 30 million between 2020-2050. Consequently, the dependency ratio (the number of people aged 65 years and above relative to those aged from 15 to 64) is set to double to 51% by 2050, placing immense pressure on social security systems.

As a result primarily of the reduction in the working age population, economic growth is set to decline from the average annual growth rate in GDP of 2.4% in the EU-25 over the period 2004-2010 to only 1.2% between 2030 and 2050. Economic growth will therefore increasingly stem from productivity gains, making it essential to promote alternative economic models.

The ageing population presents obvious challenges to social security systems and social services. Thus for the EU-25, age-related public spending is set to rise by 3-4 GDP points between 2004 and 2050, representing an increase of 10% in public spending. Unless pension schemes and age related health care and social services undergo (further) reform to curb the spiralling costs, national budgets of individual EU Member States, as well as the functioning of the single currency, are at risk.

All of these future trends explain why age management is at the heart of the EU policy agenda. Proactive measures are now being taken by Member States to maximise employment levels, both amongst the young and older generations. These are formulated in the Council’s “Guidelines for the employment policies of the Member States” and framed by the European Employment Strategy Guideline 17, which sets an employment rate target for older people (54-65 years) of 50%, and Guideline 18, which aims to “promote a life-cycle approach to work through a renewed endeavour to build employment pathways for young people and reduce youth unemployment...[and] support for active ageing, including appropriate working conditions, improved (occupational) health status and adequate incentives to work and discouragement of early retirement.”

*“...managing age requires an integrated approach that takes into account the entire working life-cycle...”*

A large number of EQUAL DPs have worked to find and test solutions in addressing the demographic challenge. These solutions have gone beyond targeting the 45+, 50+, 55+ etc. and sought to embrace the whole working life-cycle so as to ensure that individuals remain employable and adaptable throughout their career. .

#### **An absolute priority is to change employers’ attitudes to age**

EQUAL DPs have highlighted the fact that employers are often unaware of the myths and clichés they harbour in their own attitudes towards their ageing workforce. Using methods like studies, diagnostics, press conferences, films, Internet portals, and training can reverse this trend. The ‘diversity tool kits’ designed by EQUAL DPs to persuade employers to look at skills rather than at age or sex, have been a particular success.

The aim of the Austrian DP **TEP EQUAL Elderly** was to provide employers – and especially SMEs - with useful, practical tools that they could use by themselves, without the need for external consultants. The DP started by working with the SMEs to promote the potential of their elderly workers and identify the necessary instruments and methods to capitalise on this potential. They then went on to develop Elderly Plans in close co-operation with the enterprises, covering education, training needs, corporate culture, workplace, work hours, the client base of the company and the specific situation of the company concerned. Thanks to the DP’s holistic approach - encompassing corporate culture, recruitment policy, human resource development, work scheduling, health and ergonomics – the SMEs were able to develop structures enabling their elderly workers to remain employable until their mandatory age of retirement.

The main lesson for the DP TEP EQUAL Elderly is that working with SMEs requires a very tactful approach.

As Wolfgang Michalek explains, “You cannot start with talking about ‘demographic change’ to engage SMEs, or about something that will happen in fifteen, twenty years. This is far too abstract because their time horizon is the next 6 months, and they are primarily interested in how they are going to survive in the short term.”

#### **It is critically important to identify, valorise and validate the prior knowledge of older workers**

Older workers have tacit skills and knowledge that often go unnoticed and are not reflected in formal qualifications. As a consequence, it is more difficult for companies to recognise and maximise this human capital, plus they do not fully realise how much they have to lose if their older workers retire or are made redundant. When employers become aware of what competences their older workers possess, or not, they can capitalise on the tacit skills and knowledge, they can adequately invest in their human capital and have a better return on their investment. This in turn leads to a financial saving on training because individuals only learn what they need for their job.

Several DPs developed tools such as 'skills portfolios' or 'training card' systems which allowed workers to have a clear record of their competences (as well as identify gaps).

The **Investing in People** DP aimed to support companies based in the Italian Province of Macerata by providing them with an innovative approach to validate the competences of their human resources. This approach was based on a Validation of Prior Learning (VPL) system called 'Assessment of Existing Competences of Vulnerable Workers.' This system enabled the validation of competences that have been acquired by the over 45s and disabled (through professional experience, as well as via education and training). Following the 'assessment', the creation of a portfolio of competences was undertaken: the portfolio was a document that included all the evidence (e.g. DPs, videos) of the educational and professional experience of the worker concerned. A list of competences that the worker had acquired during his/her career or through formal and non-formal learning was also included in the portfolio. Finally, according to the knowledge gaps/deficiencies identified during the 'assessment', training programmes were developed for each worker, taking into account the needs and expectations of each individual.

#### Take advantage of intergenerational learning

On the one hand, older workers often lack up-to-date skills or certified knowledge, but nevertheless have long-standing experience in a particular job or work field. On the other hand, younger staff may lack experience, but they have certified skills and academic knowledge. So in many enterprises and industries a sharing of knowledge that combines the practice and theory can result in more competent personnel, improved productivity and competitiveness. This observation came through for a number of EQUAL DPs that have developed approaches for intergenerational learning.

The **RITA** DP focused on reviving and valorising the traditional gastronomy in the Algarve region of Portugal as means of preserving national heritage and adding a new dimension to the local tourism industry. The local traditional food production units were on the verge of disappearing as they were mostly constituted by older, rural workers, whose skills were not recorded or passed on. The DP mostly targeted young people to raise their awareness about this traditional sector. The DP developed an intergenerational learning methodology comprising study visits, a new academic discipline at the University of Algarve, practical training for students in traditional production, and knowledge transfer between local artisans and food engineering students. This intergenerational cooperation created academic interest in traditional industries, initiated academic research on this subject and promoted entrepreneurship as some students wanted to pursue professional careers in the sector. Apart from giving a new life to the traditional food production industry in the Algarve region, the intergenerational learning promoted by the DP also improved the overall quality and competitiveness of this industry as the academic knowledge helped to identify and solve some health and safety issues faced in traditional production processes. Therefore, the intergenerational exchange of competences made the traditional gastronomy more competitive and attractive to customers and businesses in the region. According to the DP staff, this methodology for the intergenerational and inter-sector transfer of skills could be applied to various regions, social and age groups, as well as different traditional sectors.



*RITA project demonstrates the benefits of intergenerational learning.*

Companies, social partners, local authorities, training bodies and public employment services (amongst others) all need to work closely together in addressing age management. EQUAL has shown that the best solutions are based on intensive discussions held by a wide variety of relevant stakeholders. These can take the form of dialogue with regional partners, involvement of, for example, occupational physicians and researchers, personalised support of individual workers etc.

Thanks to the EQUAL initiative, the United Nations Development Programme (UNDP) office in Poland set up the **Alliance for Work** DP to address the precarious position of the Łódź region and particularly the plight of older workers who reside there. The over 45s were struggling with an exceptionally difficult situation: they were not only dealing with the constant threat of unemployment, but were also facing the negative and often discriminatory attitude of employers, which included cases of bullying. With poor IT and language skills and often a distrust of others, the over 45s did not know how to protect themselves and usually felt inclined to give up at the first sign of an obstacle.

The underpinning rationale for the development of Alliance for Work was that an increase in the empowerment and employability of the over 45s would not be possible without the mobilisation and cooperation of the stakeholders acting on the ground. That is why a striking feature of Alliance for Work was the high number of partners involved: thirteen members coming from extremely different backgrounds, all bringing together their personal experiences and know-how to reach a common goal.

Across all of the EQUAL DPs, it can be seen that managing age requires an integrated approach that takes into account the entire working life-cycle. There is a need to tackle existing paradoxical attitudes towards age: making employers aware that older workers are able to adapt to changes in the work organisation and are an important asset in terms of experience. At the same time, resources need to be invested in developing the skills and capacity of individuals, throughout their working career.

***“For me, taking part in the activities of the EQUAL DP has been a big step forward – a door wide open. When my company closed down, I found out about the range of training opportunities on offer, as well as advice on how to find a new job which could drastically improve my chances of finding work. This support really helped me in this terrible time. After a few weeks, I felt stronger and much more ready to face new employers. I am now working in a completely new sector, but using the skills I gained in my previous job.”*** - a participant in the activities of the EQUAL DECRIRE DP in Walloon Belgium

As reflected in the words of this DP participant, businesses are not only having to adapt to economic change in today’s increasingly global and competitive market place, but these cases of change also entail human and social consequences. Moreover, as well as involving difficulty, they have the potential to bring about new prospects and opportunity. It is these social and economic consequences, these opportunities and difficulties that are the subject of increasing debate in relation to the challenges of restructuring across the EU today.

***“...a critical part of the restructuring equation is undeniably anticipating change before it occurs...”***

Proactive and socially responsible restructuring measures are at the heart of the reformed Lisbon Strategy for Growth and Jobs and the European Employment Guidelines. The reformed Strategy calls on the EU and Member States to tackle the negative consequences of restructuring by active labour market policies, lifelong learning and the anticipation of change in industrial sectors.

The importance of anticipation cannot be emphasised enough. Indeed, the European Commission Communications “Anticipating and Managing Change” and “Restructuring and Employment”, published in January 2002 and March 2005 respectively, as well as the European Social Fund (ESF) Regulation 2007-2013 stress the need to be proactive, rather than reactive in the management of change. Article 3 1. (a) of the ESF Regulation, in particular, refers to the “anticipation and positive management of economic change” as a funding priority, involving “lifelong learning and increased investment in human capital by enterprises”, as well as “the design and dissemination of more innovative and productive forms of work.” Without these and other measures, restructuring can often be costly for the enterprise and socially destabilising for workers and their families. In response to these issues, EQUAL has piloted a range of tools and methods to ensure the proactive management of change – many of which have given rise to personal success stories, as illustrated by the DECRIRE participant.

#### Understanding and observing the situation

EQUAL has demonstrated that a critical starting point for any regional or sectoral response to restructuring has been a thorough investigation and analysis of the ‘situation’. This has proved essential in truly understanding the social and economic characteristics of the region/sector, and identifying the essential drivers and consequences of change that need to be addressed. Aside from critical intelligence, another benefit of

this work has been the chance to identify – and latterly consult and collaborate with - all of the relevant stakeholders in restructuring. In many ways, this research and analysis has prompted these stakeholders to benefit from data and information that they may not previously have accessed, and think about restructuring in a new, more holistic way. Two approaches to research and analysis have proved particularly effective. The first entails research into the socio-economic picture of the region, focusing on issues and indicators. And the second involves undertaking a survey – via interviews, focus groups and questionnaires - to gather information and views from different individuals and organisations across the region or sector concerned.

Activities to observe and forecast patterns of restructuring also form an important part of the ‘restructuring equation.’ These activities

go beyond on-the-spot research and analysis, and provide a robust and regular source of information that can help to deal with restructuring in a far more proactive and pre-emptive way. Moreover, they help to provide an impetus and focus for developing coordinated approaches and strategies across a range of different organisations such as public authorities, trade unions, employers and employment services. They also play an important role in fostering the idea that restructuring is not an exceptional event, but more of a permanent phenomenon that needs constant review and monitoring.

The **Unemployment Prevention System in Underdeveloped Areas** DP, for example, developed an electronic tool called the ‘e-barometer’, especially conceived and designed to help and support SMEs in two disadvantaged regions of Poland. Through the portal, the DP provided information on changes in macroeconomic and regional business trends so as to help entrepreneurs anticipate and adapt to restructuring. For example, SMEs had access to forecasts concerning the main macroeconomic development indicators (like GDP, CPI, exchange rates, import, export, main credit rates, incomes etc), as well as to information on the crucial risks affecting SMEs. Also, entrepreneurs had access to forecasts of the main indicators of regional development, as well as to results of economic research provided in both regions.

#### Developing reconversion and redeployment structures

The development of structures and systems to assist employees faced with the prospect of redundancy has been a notable strength of the DPs. The DPs have designed and/or adapted models for effectively reconverting and redeploying workers as part of a wider support package for the affected company and region at large; indeed, they have been instrumental in developing and mainstreaming the ‘reconversion unit’ as a unique approach to restructuring in Europe.

The MEIRG DP in the United Kingdom is one high-profile example. The DP’s innovation was that it transferred the redeployment unit model often used and set up by individual large corporates, to a wider group of companies across a whole region. This innovation was particularly beneficial to SMEs that, unlike their larger counterparts, lack the capacity and resources to offer services and options to their employees in restructuring situations: services such as careers guidance and new job training; and options such as relocation to another location or flexible



working. A key success factor in MEIRG's model was that it went beyond the usual package of support. It made the most of companies working together, such that a new set of reconversion options and services could be offered to employees; for example, particular SMEs could pool together vacancy information or collaborate in seconding their staff. Secondly, the redeployment unit itself was mobile - essentially a fully resourced and satellite-linked vehicle known as 'ERIC' - and therefore able to respond quickly and flexibly to need.

This latter point highlights the importance of time within the reconversion model. Based on DP experience, the best time to intervene is when company restructuring is just occurring, or if possible slightly before - the key descriptors here are 'rapid' and 'proactive'. If mobile reconversion units and stakeholder collaboration are already in place (as seen in MEIRG and other DPs), then a swift and effective response at this point in time is possible. This type of response is highly dependent on there being active strategies to anticipate collective redundancies, long before they take place, as well as a strong basis of communication and trust with the employers. With these provisions, it is possible for 'ERIC' and other such units to be used in a proactive way, even years before the actual redundancies are planned or executed.

Another temporal issue is being able to dedicate sufficient time to the employees concerned. Workers can most benefit if they have plenty of opportunity to prepare, reflect on and deal with their personal situation, which means maximum support from a team of trainers and advisors.

#### Developing company-wide strategies and support

An observation has been that companies lack awareness of - or in some cases, fail to admit - their problems. Their tendency is to press on with 'business as normal', regardless of changes to their commercial, regulatory and structural environment, and the impending difficulties and challenges that lie ahead. DPs have worked to address this problem in three distinct ways.

Firstly, they have ensured that any company support structure or system is proactive in nature, in other words, they work to anticipate and prepare for the problems foreseen on the horizon. This preventative approach is far more effective when done in direct collaboration and consultation with the company concerned, particularly with senior managers.

Secondly, the DPs have clearly offered solutions to the problem - or at least parts of the solution. This constructive and solution-orientated approach helps to move companies away from ignoring the problem, to realising that restructuring can present opportunities, not just constraints. Another dimension to this approach is the offer of more than one solution: companies need to be presented with a range of options and strategies before the actual restructuring process takes place. For example, the LISP DP (Italy) observed cases in Italy where companies would automatically delocalise, just because they were following the examples of their competitors. If presented with a deeper examination of the issues and a number of alternatives (such as skills development or a technology up-grade), these companies may have been able to remain in their local market.



"ERIC" - the mobile redeployment unit.

And thirdly, DPs have seen the benefits in combining consultancy services with training measures. Human resource and skills development to deal with restructuring are far more effective if they form part of a wider advisory package that gives the company an opportunity to explore and discuss - with 'external experts' - the issues that they face.

This is illustrated by the **Capacity Building in the Agro-Tourism Domain DP**, which provided tailored training to Italian agro-tourism businesses or agricultural enterprises wishing to switch to the tourism sector. The DP aim was to update the competences and knowledge of these companies, often managed in a traditional way, offering a vast range of training in different sectors: Information and Communication Technologies (ICT), marketing strategies, management and corporate social responsibility. Additionally, the DP also provided consultancy services through a web-based platform (used as a help-desk), as well as direct consultancy. This double approach was believed to be more effective for little businesses facing up to new challenges and requirements.

To sum up, a critical part of the restructuring equation is undeniably anticipating change before it occurs. If industries, businesses and individuals can know and understand what lies ahead, then they are far better equipped to prepare and deal with it. However, the actual task of anticipating change is easier said than done, particularly when it concerns complex economic, social and structural transformations occurring on a large scale. However, EQUAL DPs have proved that effective tools and approaches to change anticipation and monitoring can be developed, allowing for integration and concentration of resources towards the delivery of relevant and timely solutions that benefit all.

**“I have to say that ESF – EQUAL has brought excitement to our village, where during four evenings and a whole Saturday, our inhabitants are on their feet, being busy and taking part in education.” - Mayor of a remote village that participated in the EQUAL Facilitating Lifelong Learning in Rural Conditions DP in the Czech Republic.”**

As this quote illustrates, EQUAL has offered learning opportunities to a wide range of excluded groups. Aside from people in rural areas, these have included older workers, women, people with child and dependent care responsibilities, the low skilled and the disabled. Engaging these and other individuals in learning is fundamental to the EU's priority of promoting employment and capitalising on the rich potential of all European citizens for growth and jobs. The European Employment Strategy Guideline 23, formulated within the Council Decision of 12 July 2005 on “Guidelines for the employment policies of the Member States calls for Member States”, calls to “expand and improve investment in human capital through efficient lifelong learning strategies open to all in schools, businesses, public authorities and households...with a view to enhancing participation in continuous and workplace training throughout the life-cycle, especially for the low-skilled and older workers.” This guideline is associated with the EU target of 12.5% of all working-age adults to be engaged in lifelong learning by 2010.

Working towards this target entails overcoming a range of barriers to lifelong learning, particularly when talking about disadvantaged groups. This includes problems of access to education and training opportunities. There is also the challenge, in an era of rapid technological change, for individuals to continuously update their skills, to acquire recognised qualifications, to regain confidence or to learn new ways of performing tasks.

Against this policy background, where can national and regional governments look for ideas and insights into how to make these measures a reality? What successful examples are there, ones that can inform the implementation of the ESF as well as other initiatives in the future? Answers to these questions can be found amongst EQUAL DPs since they have particularly focused on the challenges of lifelong learning vis-à-vis discriminated and disadvantaged groups in the labour market.

#### Importance of target-group tailoring

A key lesson from the EQUAL DPs has been the importance of considering the needs of the target group and adapting the lifelong learning intervention accordingly. In other words, there is no ‘one size fits all’ based on false or quick assumptions about the target group. Every tool, method or information package must be developed based on the issues faced by the target group. These issues can be explored by using bottom-up and investigative approaches such as research, initial needs assess-

ment, surveys, consultation exercises or one-to-one sessions, not only at the beginning but throughout the DP intervention.

The Irish **Equal at Work** DP followed an innovative approach by targeting the ‘demand side’, namely organisations and companies from private, public and third sectors. More specifically, it recognised the importance of pre-recruitment and recruitment processes for the progression of vulnerable groups within the labour market. The DP partnership tailored its actions and solutions according to the needs of each of the three main sectors of the labour market. For the public sector, the emphasis was placed on the development of a more competence-based recruitment system, which helped to remove entry-level barriers for people with few qualifications. Other actions included new inception and training activities to support the progression of employees in the public sector and support for staff progression from lower to higher grades. In the private sector, a pilot job-rotation model helped workers develop new skills and understand the work of a company as a whole. The employers were also enabled to better assign people to tasks and functions they were more competent and comfortable with. The actions designed for the most diverse, voluntary sector, focused on identifying good practices in the human resource systems that can be shared with other organisations and systematic comparison of remuneration of workers with that of equivalent workers in the public sector.

#### Being informed

Easy access to information, particularly at various territorial levels, has proved crucial to widening participation of the most excluded. Many EQUAL DPs have observed a lack of useful information that can help to take forward a lifelong learning measure. To address the information gap, the DPs have developed systems to increase the target groups’ access to information, on for example, training opportunities or business intelligence. They have also extended their activities as far as awareness-raising - in other words, using strategically chosen and well presented information to raise awareness amongst key audiences, such to policy makers and companies.

ICTs have played an important role by facilitating access to information in the form of websites, DVDs, films and virtual networks. DPs considered their activities as a ‘stepping stone’ towards re-engaging marginalised groups so that they could then consider learning and employment opportunities.

**Your home – your enterprise in e-urope** is an example of a Slovak DP that used ICTs to disseminate learning information – in this case, on the subject of teleworking employment opportunities. Two websites were created to help people acquire the necessary skills: a multifunctional portal on telework ([www.telework-portal.sk](http://www.telework-portal.sk)) and an information website ([www.tele-work.sk](http://www.tele-work.sk)). Via these websites, the DP fostered e-learning activities linked to telework, promoted teleconferences and other telework-related activities. Consequently, these websites became a ‘telework platform’ from which companies could launch their own telework experiences.

#### Integrating personalised and psychological support

When going through a period of change, people often face a two-fold challenge to remain or reintegrate into the labour

market: on the one hand, insufficient skills and qualifications, and on the other, psychological issues, such as personal anxieties, fears and issues of confidence. Personal training and psychological support therefore play a significant part in addressing these challenges.

And this is exactly what the **Silver Heads Club** DP in Slovakia focused on. This DP enhanced the self-esteem and confidence of the target group as a basis for them to feel comfortable in undertake vocational training. More specifically, their programmes included sport and hobby-type activities (such as silk painting, woodcarving or the creation of a dance society), which enabled the participants to gain confidence and socialise with each other. The programmes also included specific sessions with a psychologist, thereby giving participants the opportunity to discuss their concerns and difficulties (both personal as well as professional). These programmes proved particularly effective insofar as the participants were able to evolve and undertake training with people in similar situations.

In terms of personalising the support, the transnational partnership **WISER** (Worker Integration through Skill Development and Experience Recognition) provides a good example. This partnership (involving partners from France, Germany and the UK) focused particularly on ageing workers in the labour market. With this target group in mind, it designed and developed a personalised service that guided each individual beneficiary through, from initial registration, advice and interview preparation, to support in sustainable employment within the industry.

#### Making ICTs more accessible

ICTs and in particular the Internet are flexible tools that can be easily transposed from one environment to another. However, this does not necessarily mean that they are accessible to all and guarantee learning by people from disadvantaged groups. On the contrary, it is important that people who are isolated for social, geographical or age reasons can be supported to access and make the best use of the ICT facilities available.

The Dutch **My Portfolio Online** DP responded to this problem of ICT access by establishing 'Digirooms' that gave people direct access to the Internet, as well as technical assistance. These rooms were particularly easy to use insofar as they were located in highly frequented areas such as shopping centres. Furthermore, they were set up in a welcoming environment, combined with user-friendly software to help the participants design their own websites and web applications. All of these factors meant that disadvantaged individuals were able to use – often for the very first time – ICTs to improve their employment and social prospects.

For example, Joost Bosman, a beneficiary, ended up contributing to the development of a communication portal on motorcycles and road safety. He concluded, "It is amazing what I have achieved. I am even doing business abroad now. I am really proud that, via this website, I am able to contribute to safe driving."



*New qualifications, new chances for Semily district in the Czech Republic.*

The **Lifelong Learning in Rural Conditions** DP was also concerned with improving access to ICTs, this time in rural areas of the Czech Republic significantly affected by restructuring of the textile industry. In particular, the DP went about bringing ICTs directly into these remote localities by providing ICT training courses close to family surroundings, in village halls or schools. It also facilitated flexible access to training: the timetable was organised around working hours, both during the week and the weekend. The flexibility also fitted in with other family commitments, such as seasonal employment, school holidays and public festivities.

And this EQUAL example brings us back to opening quote. To conclude, the creation of a culture of lifelong learning, which is available to all, requires a collaborative approach between the key stakeholders. Employers need to be convinced of the business case for investment in lifelong learning and the associated win-win benefits. Employers who begin to engage in these issues following changes in their attitudes and perceptions will subsequently generate demand for services that will, in turn, create a market for lifelong learning and improve the access, retention and progression of the most excluded.

## 4. Promoting gender equality

# TERRITORIAL ALLIANCES FOR GENDER EQUALITY

### Tackling gender gaps on the labour market and the eternal problem of reconciling work, family and private life

“65% of occupational groups are dominated by either women or men”, states a recent publication of the European Commission that explores how to measure progress in the fight against discrimination and the promotion of equality. The authors point out that there is no visible trend to overcome sectoral and occupational gender gaps which deprive women of equal opportunities in their career paths. Unless Member States step up their actions, the researchers say, the segregation of the labour market will never change at all. Also, the prospects for tackling other burning issues in the field of gender equality are not encouraging for the foreseeable future. This is true for the use of flexible, family-friendly working time arrangements by both women and men and the so-called chores gap, i.e. the unequal distribution of housework. Progress is, however, anticipated concerning the gender pay gap, the availability of childcare places and the shared responsibility of women and men who are caring for children or other dependants. But at the current pace of action, equal pay for women and men might be reached in 20 to 25 years and it will take 15 years until a childcare place can be provided for every child in the European Union. Supported by EQUAL, European regions and local communities have set out to counteract these trends and to speed up progress in making gender equality a reality in their territories.

### Joining forces for comprehensive gender equality policies

The Lisbon Strategy for Jobs and Growth emphasises the crucial importance of regional and local development in combating discrimination and social exclusion. Integrating a gender dimension is seen as a must for the development of localised strategies for more and better jobs and improved working and living conditions for all. EQUAL enabled regions, cities and even small towns to generate multifaceted solutions to the stubbornly persisting problems. Throughout Europe, EQUAL Development Partnerships (DPs) orchestrated activities that linked gender-fair employment and desegregation policies to work-life-balance models and strategies to dismantle traditional gender roles and stereotypes.

**“The most important change is the revitalisation of a particular part of the territory’s population, mainly women, as an engine for change and economic, social and cultural development”. - Guillermo Vergara, Fundación Paideia Galiza.**



*We can do it! Anna and Sofie at work*

Creating powerful, proactive alliances was the most important factor for efficient and sustainable actions. The EQUAL partnership approach proved to be optimal for bringing all players together: political decision-makers, public authorities, social partners, employers and citizens. Projects found that four strategies were particularly successful to ensure their lasting commitment. These included placing the alliance under the direct responsibility of a mayor or high-ranking official of a region in order to emphasise the policy priority accorded to eliminating gender disparities. Moreover, pleading the business cases for the comprehensive approach was essential to develop a common vision of the benefits of the venture to the region or local area and also to each partner and their respective institutions. Information campaigns, town meetings and round tables enhanced the motivation of citizens to be part of the change process and created a new “societal dialogue” in the territory that went beyond the traditional social dialogue between employers and trade unions.

### Bridging gender gaps means closing skills gaps

Strong self-interest and, in particular, the pressing need to mitigate the consequences of demographic change motivated regions and local communities to take the lead in designing, testing and disseminating the various EQUAL activities. In many Member States a significant lack of labour supply and increasing skills gaps can already be felt in a number of economic sectors such as science, technology, engineering and construction, and the health and care sectors. Territories are seeking to attract business investors; they are also facing difficulties in broadening their skills base and thus becoming more competitive.

The development of local and regional resource centres, or “desegregation hubs”, is a significant EQUAL achievement in this context. Striving to build a more gender-balanced and diverse workforce, these “hubs” united the experience and resources of women’s training centres, employers’ organisations and companies from the most gender-segregated sectors of the labour market, mainstream training and educational institutions, careers services and equal opportunities bodies.

In Sweden, for instance, the LIBRA project opened up careers in the construction industry to women and ethnic minorities. The project staged eight pilot programmes, each including several interlinked projects, which were carried out in three regions. Led by regional task forces, the activities targeted women and immigrants, offering information, guidance and training and creating work environments that facilitated the retention of women in the sector. LIBRA’s achievements have been widely disseminated and other regions have started to use and further develop the model. Its new recruitment and training approaches, and also the flexible family-friendly work arrangements on construction sites, have become a key issue in collective bargaining.

The JIVE project that operated in the UK on both regional and national level defined its regional desegregation hubs as competence centres or physical/virtual structures that develop and disseminate innovation. Its four regional hubs (South-East, Yorkshire & Humber, Scotland and Wales) developed a package of interrelated measures that included gender equality courses for managers, lecturers, trainers and support staff of further and higher educational institutions and work-based training providers. These courses enabled those key people to meet the learning needs of women training for employment in male-dominated growth areas. Moreover, the scheme provided accredited training in gender equality practice, follow-up advisory services and ongoing support for the development of gender equality action plans in the participants' organisations. Another element of the package was modular training for careers guidance professionals which led them to become "change agents" who could overcome stereotyping and encourage girls and women to consider working in the engineering, construction or technology sectors. Support for companies in the use of a gender and diversity audit developed by JIVE was offered to help them analyse the recruitment and retention problems they might be experiencing. Last but not least encouragement, ongoing support and mentoring for women and girls who were contemplating a career or already working and/or training in male-dominated sectors within the four regions was a key activity of the hubs.

At the end of EQUAL's lifespan the UK Government mainstreamed JIVE's achievements by entrusting the establishment of a National Resource Centre for Women's Training in Science, Engineering and Technology (SET) to this successful partnership that continues to work for gender equality and diversity in growth areas of the labour market.

#### Widening choices in education and training from early on

Other regional and local EQUAL partnerships focused their desegregation strategies primarily on the next generation of women and men. These projects worked within the education system, starting from kindergartens and primary schools and moving all the way to secondary schools and universities. The efforts did not just address gender stereotyping at an early age, they also developed policies and practices that would foster excellence in education as an investment in future human resources.

In Finland the Mirror project worked with teachers and parents and helped to overcome perceptions that girls, for instance, lack technical interest and skills or that boys lag behind in terms of literacy and communication. Visits to companies proved to be an excellent way to challenge gender stereotypes. The pupils were asked to carry out surveys on jobs performed by women and men, which triggered questions about the causes of inequality and ideas about how the children envisaged their own adult life in a more egalitarian society. In many regions and local communities these models have become integral parts of teachers' training and continuing education.

The approaches developed for secondary schools resulted in more girls choosing non-traditional subjects, training or education and owed much of their success to their organisation as an ongoing process and not just as single events.

The Tempora DP in Spain embarked on such a developmental process. It created innovative curricula which challenge traditional gender roles and the subtle integration of the related stereotypes into science and technology. Rather than offering extra general courses on equal opportunities and role-sharing at home, the programmes used household processes such as cooking, baking or ironing to explain certain phenomena in chemistry and physics.

In other Member States EQUAL projects ran specific ICT courses for girls and organised Internet clubs and summer camps for "young female inventors". Companies "adopted" schools in their community and offered taster weeks enabling female and male pupils to get a clearer view of the variety of possible occupations. German and UK examples prove how work experience placements for students and trainees can become stepping stones to employment or a new career.

#### Gendering a traditional female domain

Whilst most of the strategies were aimed at supporting girls and women of different age groups to access growth areas where females are underrepresented, a small group of EQUAL partnerships sought to break down the barriers to men working in typical female domains such as social and health care. The rationale of these projects was based on the fact that a large number of the predominantly female care staff will be retiring in the near future, whilst the proportion of the older people in the population continues to grow over the next decade and this will, in turn, generate a huge demand for qualified staff:

The SOS-MX partnership operated in Denmark's Jutland region and linked vocational training providers, social and health care schools, and local communities, which in Denmark are responsible for the care of older people. SOS-MX managed to attract men and different target groups of young people, including immigrants to these jobs. The corner stones of the approach were a continuing training course for career counsellors that supported them to integrate the gender dimension into their work and also a new training concept for male entrants to the care sector. Another crucial ingredient was a strategy to improve the image of the care sector as a labour market segment with difficult working conditions and low pay. A media campaign made the career possibilities more visible and understandable to men. The main product of the campaign was a documentary entitled "A Job for Real Men" that was broadcast by the regional TV channel. Clearly the project has influenced guidance services, training agencies, recruitment practices and work environments. It also succeeded to bring about change in the Social and Health Care School of North Jutland. The school is the only body in the region offering accredited training for jobs in the care sector and as a result of EQUAL it has changed its recruitment practices to be more gender-sensitive. Recent experience demonstrates an increasing number of male applicants, which is seen as a direct result of the media campaign and the new approaches in careers counselling.

## 4. Promoting gender equality

# TERRITORIAL ALLIANCES FOR GENDER EQUALITY

### Social innovation for better work-life balance of women and men

Combating gender gaps on the labour market was only one strand of EQUAL's regional and local gender equality policies and practices. New solutions to the persisting dilemma of reconciling work, family and private life were also one of the priorities chosen by EQUAL partnerships forming territorial alliances. In some Member States time policies were at the heart of those strategies. The idea is based on the fact that Europe is moving from an industrial society with synchronised work patterns to a service and information society with rhythms increasingly out of sync that tend to make working hours more and more irregular. But the "times of the city" - opening hours of local authorities, stores and other service providers, child-care facilities and schools and the schedules of public transport systems - are slow to follow suit. This makes it difficult for people to balance the conflicting pressures on their lives. Women with care responsibilities for children and/or other dependants suffer more from this daily battle against time than men. Coping with a job and managing a family leaves no time for social, cultural or civic activities, and "personal time" is often out of the question.

Time Bureaus or Agencies, created and/or strengthened by EQUAL, particularly in France, Italy and Spain, have developed concepts to help women and men cope with these challenges. Those agencies are physical infrastructures working along four major avenues:

- harmonising "city times";
- introducing more flexible work organisation benefiting both employees and employers;
- needs-tailored, flexible care and other family support services; and
- triggering changes in attitude to enable a more even sharing of unpaid work at home between women and men.

Achievements in these four areas have made a real difference in the daily lives of women and men, whilst at the same time helping to enhance the "soft factors" for economic development i.e. the general quality of life.

In the framework of the French project Rennes Egalité des Temps the local government set the ball rolling by opening six "neighbourhood town halls". These local administrative centres help people save their precious time by catering for almost every type of demand from obtaining a copy of a birth certificate, through using health and social services, to setting up an appointment with a careers guidance or placement officer. In addition, social services have been reorganised as one-stop-shops for certain categories of users such as families with children. These centres specialise in early childhood and educational activities, financial aid and issues like family planning, pregnancy care and supporting couples in crisis situations.

The city government also piloted a new scheme that set an example of family-friendly working time arrangements to other employers. The scheme succeeded in dismantling the "broken shifts" system that was the usual pattern for the cleaning of all municipal buildings. To make enough income, the predominantly female staff had had to work two shifts, one in the early morning and another at night. However, with the help of this model, they now have full-time jobs and can either opt for a schedule from 7.30 to 15.30 or from 10.45 to 18.45. Moreover, the new scheme has enabled women to swap workplaces so that some now live closer to work and need less time to commute. As a result of all the changes brought about by the project, work satisfaction has increased and absenteeism has dropped by 30%.

The provision of flexible care for children and other dependants outside of the usual "7 to 6 o'clock bracket" is a lifeline for women

working around the clock and on weekends, such as in supermarkets, hotels, restaurants or hospitals. EQUAL Time Agencies have reinforced that lifeline through the extension of opening hours in existing care facilities and the creation of new services often supplied by small businesses and social economy enterprises, functioning as home-based and institution-based services.

In France the Gepetto project has created a local and regional network of qualified child carers. They provided quality care services at home for children whose parents work on so-called "atypical" schedules and such parents represent 30% of the workforce in France. The costs are borne primarily by the parents' employers but are also partially met by a means-tested contribution from the family. Since 2003, Gepetto and its follow-up project Alice have delivered 60 000 hours of childcare to 1 800 children from 1 200 families. The model is recognised and integrated in services paid for by the Caisse d'allocations familiales (family benefits agency), which confirms that this form of home support provides stability for the children and contributes to their development, whilst removing one of the major obstacles to the employment of their parents.

Thanks to EQUAL the Fogaflex project in Luxembourg created two new childcare centres which are different from the existing facilities. They have longer and more flexible opening hours and also offer childcare on Saturdays, and if children are ill, home-based care can be provided. At the same time unemployed and inactive women were trained as "assistant carers" or day mothers. The approach was a "second chance" for unemployed or inactive people with no or low qualifications who wished to return to the labour market. Many of them were interested in working as carers, but as they had not completed upper secondary school they did not meet the entry requirements for regular childcare training that takes place at college level. Fogaflex also addressed the problem of undeclared and precarious work by motivating women who had before worked as childminders without any formal credentials on the grey market to participate in the training programme. This enabled many of them to get a regular job with social security coverage in one of the new centres or to turn their illegal businesses into legal ventures.

Today the Ministry of Family Affairs and Integration is funding the new childcare centres that are called "Maisons Relais". It also issued a decree which makes the FOGAflex achievements sustainable. People with no or low formal qualifications can now build a career in childcare with the meanwhile officially recognised basic training as the first step. In addition to some years of work experience they can use it as a springboard to regular childcare training at tertiary level.

Those good practices generated by EQUAL increased productivity and reduced absenteeism in regional and local companies. Employers came to understand that financial support to needs-tailored care is a good business investment. Large companies contributed to the set-up and running costs of local facilities or, less frequently, created company-based childcare subsidised by the municipality.

### Linking care to other family support services

In some regions and local areas EQUAL projects maximised the efficiency and impact of their efforts for more and better care by linking these to other family support services and positive actions for women.

This is the case of the Spanish DELOA partnership that was formed by eight local communities and the Private Paidea Foundation that has a reputation for its contributions to local development in a remote rural area in Galicia. During its lifespan, Deloa supported more than 700 women who participated in its multi-faceted activities that included training, creating and sustaining jobs in promising market niches such as tourism, horticulture, landscaping and historical furniture restoration. To enhance women's chances of finding and keeping a job, the project set up childcare facilities in several villages and also organised care provision for the elderly. Unemployed women were trained to work as carers and thus to create their own jobs. But without a reliable transport service the whole concept would not have functioned. EQUAL partners invested in three minibuses that collected and returned the children to all of the villages within Deloa's territorial area and also ferried their mothers to their training courses or jobs in larger towns.

This was the nucleus of a permanent service that is now handled by a social economy enterprise catering for all citizens and also for schools, tourists and local associations. Drivers are formerly unemployed women. Getting to this point required a change in the law that did not allow regional authorities to grant transport permits to companies in areas with a population of less than 85 000. This was the case for the territory where Deloa worked. Thanks to Deloa's lobbying and the pressure of local and regional decision-makers, the law now permits the use of this new model throughout the region of Galicia.

#### Overcoming traditional gender roles and stereotypes

The ambitious objectives of territorial gender equality alliances incorporated in many cases the endeavour of dismantling the so-called male breadwinner model. They sought to overcome the perception of men as providers for the family, whilst women are expected to shoulder the lion's share of unpaid work at home. Despite the fact that more than 60% of households are now "dual income" couples, this life arrangement is still the most dominant form among women and men in the European Union.

Particularly at local and regional level EQUAL partnerships developed successful programmes that supported men and women to learn new and to un-learn old gender roles. This involved media campaigns but also working in neighbourhood groups and training programmes for parents.

The MV United project in Flanders worked with all kinds of print and electronic media, but the most innovative aspect was to package its message into television formats attracting broad audiences such as telenovelas and soap operas. Evaluation shows that the project succeeded to trigger a public debate throughout the region and to attract people who would normally not listen to the "usual suspects" such as ministers of equal opportunities or gender equality bodies.



*Deloa minibus: for mothers and for children.*

Projects such as the Paris-based Ecole des parents organised workshops where parents learned about practical solutions to task-sharing between mothers and fathers. In other cities "parents' cafés" invited men and women to give voice to what they felt and thought about old and new gender roles. Here, parents were also encouraged to embark on practical activities which involved role changes. Men and women discovered that they possess skills that are often labelled as typical of the other gender, such as cooking, constructing technical toys, playing football, telling stories, making music or singing lullabies and that they also enjoyed using them. Young male participants reported that the experiences of "more seasoned" fathers helped them to get to grips with parenting and to seriously consider taking parental leave.

#### Regional and local decision-makers acting as change agents

All these approaches created real win-win situations benefiting women and men and also the regions, cities and towns. The EQUAL achievements helped them to increase their competitiveness as future-oriented territories with the capacity to attract business investors and qualified labour. They have come to understand that integrating the gender dimension is a must for the development of localised strategies for more and better jobs, and improved working and living conditions for all.

## 4. Promoting gender equality

# CLOSING THE GENDER PAY GAP

### **Acting at all levels, involving all stakeholders and focusing on all factors of pay discrimination.**

Across the EU economy, women continue to earn an average of 15% less than men, according to a recent report published by the European Commission. The gender pay gap represents the difference between average hourly pay for women and men before tax across the economy as a whole. It has barely changed over the past decade and reflects ongoing discrimination and inequality in the labour market which, in practice, mainly affects women. Vladimír Špidla, EU Commissioner for Employment, Social Affairs and Equal Opportunities urges women and men, NGOs, social partners and governments to tackle the problem at all levels. Combating pay discrimination is part of the Commission's Road Map for Equality between women and men and figures amongst the objectives of the Lisbon Strategy for Growth and Jobs. The Commissioner sees an urgent need for action: "Girls out-perform boys at school and more women enter the labour market with a university degree than men, but a pay gap of 15% persists. This is an absurd situation and needs to change. The pay gap is a complex issue with multiple causes. Sometimes we see pure discrimination. But often reasons are hidden: women do more unpaid work, like taking care of the household and dependants; more women work part time and often the women-dominated sectors are on a lower pay scale." Throughout Europe EQUAL has addressed the root causes of this complex phenomenon which discriminates against women, particularly older women and those with an ethnic minority background.

*"Girls out-perform boys at school and more women enter the labour market with a university degree than men, but a pay gap of 15% persists. This is an absurd situation and needs to change."* - Vladimír Špidla, EU Commissioner for Employment, Social Affairs and Equal Opportunities.

### **Ensuring better application of existing legislation through awareness-raising**

EQUAL gender equality activities usually included a thorough analysis of the gender pay gap in their country when preparing their various measures to bridge gender gaps on the labour market. There were, however, projects that focused exclusively on fighting pay discrimination. An important part of their strategy was to make key players such as policy makers, employers, social partners and the public at large aware of the existing laws and to stimulate women to make use of their rights concerning equal treatment on the labour market.

Led by the Netzwerk österreichischer Frauen- und Mädchenberatungsstellen, the umbrella organisation of 40 counselling and support centres for women and girls operating in all parts of Austria, the KLARA! project developed a multi-level set of activities that strengthened the capacity of the centres by extending their expertise so that they can now respond to the growing demands related to gender equality and particularly to pay discrimination. Moreover, the partnership investigated and validated legislation and equality policies with special attention to their impact on equal pay. As in many other Member States, these studies revealed that the pay gap reflects inequalities in employment such as women's difficulties in reconciling work with private life, which often result in working part-time or taking career breaks. As a consequence, female career paths are more often interrupted, slower and shorter, and hence less well paid than men's. To enable gender equality specialists to understand all these causes of income inequalities, KLARA! created and implemented a continuing education programme that provided them with recognised qualifications as "equal

pay agents". In parallel the partnership organised a national campaign that included an itinerant exhibition, advertising, television ads, movies and widely disseminated free (post)cards that carried equal pay messages. Such campaigns were also implemented by KLARA!'s transnational partners in Italy, Spain, Slovenia and Slovakia.

Last but not least, the project dedicated one strand of its activities to empower women who suffer from the most alarming pay discrimination: female immigrants and asylum seekers working in the shadow economy or in precarious employment and fighting for daily survival. KLARA! offered a mentoring programme that supported them to find training or regular work and also tried to deal with the fact that the majority of migrant women who have found a job are working beneath the level of their qualifications. The mentoring scheme was able to help some of these women to change their situation. Mentors came from ethnic minority backgrounds and "made it" on the Austrian labour market. They accompanied their mentees both emotionally and practically in leaving an underpaid job, filing a court case through the labour court and finding a new job where the pay took account of their education and work experience.

It is still early days to identify the sustainability and lasting impact of projects like KLARA! But what is already evident is the strong empowering effect on the organisations and people involved. They are all benefiting from the capacity-building engendered by EQUAL. Their passionate advocacy of equal pay is now coupled with well-founded knowledge and skills and they can tap into a closely knit network of gender experts.

### **Promoting equal pay among employers**

Whilst some projects have also been providing information on rights, support and advocacy to those directly affected by the pay gap, others targeted exclusively key players who are in a position to bring about change in the policies and practices which maintain the pay gap. These included employers, trade unions, government departments and national equality bodies.

In Scotland, which had, at the beginning of EQUAL, one of the biggest gender pay gaps in the EU, the Close the Gap partnership targeted its main thrust of actions to public and private employers. The Equal Opportunities Commission, which coordinated the project, developed a five-step model for an equal pay review process. This helped organisations to test their pay structures and to ensure that they were not discriminatory. These equal pay reviews were much more than simple data collection exercises, as they entailed a commitment to remedy any gender pay inequalities. This meant that the reviews were bound to have the involvement and support of managers with the authority to deliver the necessary changes. The steps in the process required firstly a decision on the scope of the review and the data required. This was followed by seeing where women and men were doing equal work - like work, work rated as equivalent or work of equal value - and then by collecting pay data to identify the gaps. A detailed analysis led to tracing pay gaps that were free of discrimination. If this was not the case the companies were offered support for establishing an equal pay action plan.

The Scottish Executive is the regional government and its membership was of major importance to the DP's mainstreaming activities, particularly as all Scottish Executive-funded agencies and departments have been required to carry out an equal pay review. Scotland's employers now compare well with the rest of the UK in terms of equal pay. Today some 49% of Scottish employers have completed an equal pay review and the project has also succeeded to bring on board all stakeholders, employers, employees, trade unions and policy makers and to provide them with knowledge and skills of what they can do to close the pay gap in Scotland.



## Auch Männer haben Kinder. Wer versorgt sie? Familienarbeit ist nicht weiblich, Karriere ist nicht männlich.



## Frauen verdienen mehr!

*Men too have children. Who is taking care of them? Women deserve more!*

### Creating new job evaluation systems that value women's work

Gender equality advocates are aware that the gender pay gap extends well beyond the question of equal pay for equal work. One of the main causes is the way women's competences are valued compared to men's. Jobs requiring similar qualifications or experience tend to be paid less when they are dominated by women than by men. For example, in some countries nannies earn less than car mechanics, supermarket cashiers less than warehouse workers, nurses less than the police. To overcome those discriminatory practices a small number of projects forged alliances amongst the relevant key actors and undertook to work towards new job evaluation systems.

In Portugal the Revalorizar trabalho – promover Igualdade partnership decided to concentrate this strategy on a typical female domain of the labour market. The General Federation of Portuguese Workers (Intersindical Nacional – CGTP-IN) that has long-standing experience of combating discrimination joined forces with the International Labour Organisation (ILO) in order to push for the implementation of the ILO Convention 100 "Equal pay for work of equal value" in Portugal. Together with its other partners, which included social partner organisations, a gender equality body and the General Directorate for Labour Inspection, CGTP chose the restaurant and catering sector as the field of activity. With 60% of women amongst its employees, this sector is characterised by low pay and precarious employment. It is dominated by small enterprises with low productivity, high turnover and absenteeism. With the ageing of its female workforce, the sector has attracted young, mainly unregistered migrant women from Brazil and Cape Verde: as a result, the average wage has dropped even lower.

To redress the undervaluation of certain occupations and to lay the ground for a new remuneration system, transparent and gender-neutral criteria and procedures were developed. The approach involved a screening of the existing jobs by using existing statistical data, questionnaires that were filled in by the employees and work-shadowing in a sample of enterprises. This enabled a thorough assessment of work content, requirements and conditions. One of the results was - as expected - that there are jobs that have very similar content but are paid at very different rates, depending on the dominance of women or men in that particular area of work. The next step was to form a working group that explored a series of crucial issues: Which work factors are key elements in a job profile? How should these factors be weighed when it comes to the re-evaluation of a job? How can the social partners use these new insights in the process of collective bargaining? Based on the ILO's guiding principles, the group allocated points that carry weight in a job profile and thus contributed to modernising the sector's occupational classification system that goes back to the early 1970s.

The ILO has realised the unique potential of the project's approach and quoted it as a promising pilot programme in its 2007 Global Report on the follow-up to the ILO Declaration on fundamental Principles and Rights at Work.

Partners in equal pay alliances across Europe are convinced that social partnership amongst unions and employers plays the most important role in finding viable solutions and also in updating the related vocational training programmes. In many places collective bargaining is underway and companies have developed an interest in more gender-fair job profiles. They have begun to see the necessity of investing in people: better pay and better working conditions are now gradually recognised as being important elements in any strategy designed to build a loyal and productive staff.

As visible in their new ESF programmes, EU Member States are striving to learn from, and to take advantage of, the achievements of these equal pay champions.

## 4. Promoting gender equality

# BRINGING GENDER INTO THE MAINSTREAM

### **Making women and men benefit equally from employment and inclusion policies.**

Even if the “family photos” of European Councils are no longer an all male affair and reflect more gender balance in Europe, inequalities and discrimination based on gender persist. This is true in almost all societal spheres and particularly in political and economic decision making, in education and training and in the labour market. The Report on equality between women and men 2008 indicates a snail's progress: slow, but steady, with occasional reversals. Although gender gaps in employment and unemployment are gradually disappearing, occupational and sectoral segregation and the gender pay gap have not changed in the last decade. Some progress can be observed in the quantity of childcare but in most Member States the existing provision simply does not meet the demand and also care services for the elderly leave much to be desired. No wonder women face continuing difficulties in reconciling professional, family and private life. Too few employers offer family-friendly work organisation, and the unequal division of domestic tasks adds to the problem. Clearly, there is an urgent need for comprehensive approaches to gender equality that address all of these problems and challenges. There are many commitments such as the Commission's Roadmap for Equality, the Member States' European Pact on Gender Equality, the Lisbon Strategy for Growth and Jobs as well as the regulations of the European Structural Funds (2007-2013) and the ESF Regulation in particular, which urge decision makers at all levels to integrate the gender dimension into their policies and practices. Yet implementing gender equality in the daily working and private lives of women and men is far from being a reality.

*“In Finland it is generally recognised that equal opportunities are no luxury, but a business advantage in our highly competitive economies.” - Kaisa Kauppinen, research professor at the Finnish Institute for Occupational Health and coordinator of the EQUAL project Monikko.*

### **EQUAL: test bed and motor for gender mainstreaming**

Across the EU, EQUAL partnerships and National Thematic Networks (NTNs) have tried and tested a multitude of approaches to integrating the gender dimension through gender mainstreaming (GM) into project and programme levels. They have helped local communities, regions, economic sectors, companies or education, training and research institutions to introduce GM.

The avenues from the decision on adopting GM to its actual implementation may have varied, but they always incorporated a number of steps that were crucial to making the outcomes both systematic and sustainable. The first step involved a gender impact assessment of the chosen policy field to find out

how women as compared to men benefit from existing - and might benefit from intended - policies and practices, a procedure that required gender-disaggregated data. Based on the results which usually revealed gender gaps and discriminatory practices, gender equality targets were formulated and action plans drawn up. The next stage involved the anticipation and analysis of obstacles that were most likely to hamper progress and a consideration of options that had the potential to reduce or remove the obstacles. This was followed by a SWOT analysis or another method that aimed to find the most realistic and viable solutions in terms of costs and benefits, available time and organisational context. Implementation of the selected option was the next step, which often integrated the gender dimension into the management and control systems of the participating organisations. Last, but not least, effective monitoring and evaluation were key ingredients which ensured an ongoing improvement of gender equality performance.

### **Putting gender glasses on**

The gender impact assessments carried out under EQUAL confirmed that there is no such thing as gender neutrality. Placed under the microscope of projects and thematic networks, the various fields of action revealed discriminatory practices, which mostly affected women, but sometimes also men.

In Denmark the Youth, Gender and Career project brought about change in the methods of the country's vocational guidance system by looking at the current practice through “gender glasses”. Despite most counsellors claiming to be treating boys and girls equally, the project found that the guidance they offered was marked by gender stereotypes and tended to lead the young people towards typical male or female domains of the labour market. Under EQUAL, awareness-raising and training was provided to guidance staff and also to teachers and parents. This led clearly not only to a better understanding of the gender dimension in the vocational choices of young women and men in guidance, school and their social environment, but through its visibility and lobbying the project succeeded to influence the reform of Denmark's guidance legislation in terms of GM.

Gender impact assessments carried out by private companies which had been partners in EQUAL projects in Denmark, Belgium, Styria, and Finland were amazed to discover that the same



*Put on your gender glasses to see the reality*

procedures in personnel policies had different effects on male and female staff. They found that women were disadvantaged in their career advancement, usually because of difficulties in balancing professional and family life. They often could not afford to spend additional hours on training in new skills or to put in the amounts of overtime typical for people trying to climb the corporate ladder. Employers also came to realise that their strategies for attracting and retaining qualified female staff tended to fail because of a lack of childcare and family-friendly working conditions. Under EQUAL, these shortcomings were successfully addressed by equality plans that supported women in aspiring to senior management positions and/or to jobs in male domains. For instance, the development of a gender fair assessment centre helped to improve recruitment and selection. Public-private partnerships of companies and municipalities invested in flexible quality childcare, and this alleviated the daily pressure of reconciling parenthood and career.

Planar Systems Finland Ltd belonged to a group of technology enterprises, which the Finnish MONIKKO project accompanied through all the stages of equality planning. Backed by the top management, the first step was to set up a gender equality team that represented all categories of employees and showed a gender balance. A questionnaire was handed out that focused on equal opportunities in general, vertical and horizontal desegregation, discrimination on the basis of gender and age, sexual harassment, career development and diversity. In total, 74% of the staff completed it. Male managers, who had believed that Planar Systems had no equality problems at all, found some results quite astounding. For instance, although no case had ever been officially reported, some women mentioned in their responses that they had experienced sexual harassment. Since GM cannot be implemented in all areas of a company at the same time, the equality team, senior management and CEO agreed on several topics that formed the core of Planar Systems' equality plan: a zero tolerance policy to combat gender-based and sexual harassment, more transparency related to pay, recruitment and promotion as well as making equality an integral and proactive part of the company's leadership culture.

### Drivers of change

The implementation of these measures would not have been possible without the firm commitment and backing of senior decision-makers. Throughout the EU, EQUAL has designed strategies to secure the active support of key people. This included the formation of groups of "ambassadors" or "advocates" for GM who contacted policy makers, senior managers and business leaders and pointed out both the necessity and the advantages of systematic gender equality policies.

A particularly smart move was the GM coaching of individual leaders in the Swedish Armed Forces and the Police Service organised by the Gender Force project. The coaches came from JÄMO, the National Gender Equality Agency, a management consultancy, universities and even large enterprises such as Volvo. The "coaching pairs" worked together for one year. According to evaluation, increased gender knowledge and expertise generated through this special approach led to more gender-fair decisions and helped the participants to stimulate and monitor GM in their areas of responsibility.

Also, sustainable GM was greatly enhanced through enabling middle management to drive the process. EQUAL and ESF projects in Germany, Ireland and Spain trained executives

from different operational areas as gender agents or equality advisors who initiated and managed GM within their own organisations. The promotion and dissemination of these activities has led to an ever increasing demand for GM training. Candidates are now coming from federations of municipalities and regions, employer organisations, chambers of commerce, trade unions, local development agencies and business consultancies. Transnational cooperation has triggered a demand for similar initiatives in other countries, especially in the new Member States.

### Influencing the new ESF and other policy fields

Thanks to EQUAL, in many Member States GM is no longer perceived as a complicated concept that is only understood and handled by specialists: gender equality bodies, experts and researchers.

In the Austrian region of Styria, for example, EQUAL projects that had been focused on GM in employment policies pushed to transfer their approach into other policy areas. Stimulated by the achievements, Bettina Vollath, the Minister for Education, Youth and Women, committed herself to integrating the gender dimension into all regional portfolios and policy fields. As a result, the Styrian Government has created staff positions for two gender mainstreaming experts who are now leading and monitoring this process. An important part of their task is also to build gender competencies through staff training at all levels and to launch pilot projects as springboards for dissemination of equality goals and strategies.

EQUAL has also influenced the world of the European Social Fund (ESF). Following the Commission's so-called dual-track approach to gender equality a large number of ESF Operational Programmes indicate that GM will be applied as a transversal principle across all thematic priorities and actions, whilst at the same time – in the face of particularly high gender gaps – positive actions for women or for men will be funded.

Poland, for instance, incorporated GM into Project Cycle Management which is a must for all ESF projects. Its intermediary body and support structure for EQUAL used GM training to involve institutional ESF actors. The training is tailored to the needs of different players such as Intermediate Bodies, Project Assessment Committees, regional ESF Information Centres and project promoters. It has also been provided to national ministries and even the office of the Prime Minister.

In other countries GM advocates proposed to create dedicated infrastructures within the ESF Management Authorities or to buy in expertise, so that GM can be firmly anchored in the new ESF programmes. This is, for instance, the case in Sweden where an external GM task force will ensure the gender dimension in ESF programmes and projects and in Germany where the ESF at federal level is establishing a so-called GM coordination unit and where some of the Länder have created similar mechanisms. In line with the relevant regulations of the Structural Funds, gender equality strategies are obviously being stepped up. Eleven Member States have joined forces to set up a European Network on Gender Mainstreaming in the ESF. They plan to continue the work of the EQUAL Community of Practice and to optimise mutual learning about gender equality and GM in Europe.

Asylum seekers do not choose to migrate; they are forced to escape from their country out of fear of persecution or even worse, out of fear for their lives and those of their family. Once they seek refuge in a country that they consider safe, the procedures to receive the refugee or a humanitarian status can take a very long time. During this waiting period, it is not always possible for these newcomers to receive education and training, to find employment or to get assistance in building up a new, independent life. Long periods of inactivity can severely damage people's self-confidence, motivation and personal development. The EQUAL partnerships have proven that early, well organised and holistic interventions provided by people with the right skills and the right attitude can be highly empowering and true life-savers. For the first time, asylum seekers are explicitly mentioned in the regulation establishing the European Social Fund, which provides a real opportunity to build on the successful approaches developed under EQUAL.

### A holistic approach to integration

The length of the asylum determination process, which risks leaving asylum seekers in a state of inactivity and disempowerment, underscores the importance of good quality advice, education and training for asylum seekers upon their arrival. Most EQUAL partnerships have developed multi-thematic activities, considering integration a process requiring support from the first day of arrival to the final decision on the asylum application. Integration not only includes different stages but also has multiple dimensions such as housing, material assistance, social networking, community involvement, education and labour market participation.

The Asylum Seekers Partnership from Malta put in place an integration training package for asylum seekers which incorporated three modules: English language, 'Life Skills' which encouraged asylum seekers to share their often traumatising experiences through games, writing and talking together, and a module dedicated to labour market orientation. EPIMA in Austria helped young asylum seekers (many of which had arrived unaccompanied) to learn German while also following vocational training and practical work experience. Both partnerships strongly benefited from the participation of different organisations - ranging from local and regional authorities to education and training institutes, trade unions, employer organisations and companies interested in hiring asylum seekers - throughout the different stages of integration.

The experience of EQUAL makes the case that activities aimed at the social and vocational integration of asylum seekers is a holistic process which should start as early as possible. Member States which allow asylum seekers to access advice, support services, training and education early on testify to higher levels of motivation and faster integration in the case that asylum seekers receive a positive decision on their status. Asylum seekers faced with the necessity

to return to their country of origin are also better prepared and more positive about their future.

### The empowerment of asylum seekers should be an essential part of all activities targeted at their integration

Asylum seekers are not merely recipients of aid, but also active agents in their integration into society. In the asylum procedure, other persons continuously speak and act on their behalf, which creates a sense of dependency and helplessness which negatively influences how asylum seekers then approach other services or engage in other activities in the host society. EQUAL partnerships have ensured the participation of asylum seekers in their own integration pathways, in the design of activities to further their integration and in various decision-making processes. Asylum seekers have also successfully provided support and training to their peers.

In order to create an empowering environment, the VIAAS partnership in Portugal developed a reception centre for asylum seekers which at the same time functioned as a community centre, thus creating a place where asylum seekers and citizens get to meet naturally whilst enjoying a drink, music, theatre or other leisure activities.

Several EQUAL partnerships actively involved asylum seekers in the design and management of programmes and in the provision of services.

EASI in the UK addressed the general lack of meaningful consultation and participation of asylum seekers in activities by creating an Advisory Group. This group of asylum seekers which received customised training to become engaged and confident in their advisory role especially helped to overcome the invisible barriers that often exist between service providers and their clients. More importantly, the advice helped to make services more appropriate and adequate.

To truly empower vulnerable groups or individuals, support has to be tailored to their needs and characteristics. A number of EQUAL partnerships applied creative methods to engage and motivate individuals, such as theatrical expression, music and cultural activities. Other EQUAL partnerships specifically sought to involve the public and private sector in their activities, motivating them to recruit asylum seekers for voluntary or paid work.

EQUAL has provided a wealth of concrete examples of how asylum seekers can be empowered, and how this empowerment each time results in improved personal wellbeing and motivation, increased social integration and better jobs. At the same time, activities aimed at improving the interface between asylum seekers and society have also helped to increase the acceptance of these newcomers and to combat racism and xenophobia.

The Maryhill Citizens' Advice Bureau, a partner of the EQUAL partnership ATLAS in Scotland, developed a tailored training package for asylum seeker volunteers who, while in training, acted as advisers offering support to other asylum seekers. This training package was adapted from the Bureau's mainstream training programme by adding tailored components such as one-to-one language support for technical terms used in everyday work concerning benefits and housing. An interesting by-product of this model was the development of a training dictionary compiling technical terms as well as slang words and phrases commonly used in Glasgow. Once trained, asylum seeker volunteers were able to assist all of the Bureau's clients and not only asylum seekers, bringing them into contact with the host community and in this way assisting their integration. A quarter of volunteers at Maryhill Citizens' Advice Bureau are now asylum seekers or refugees, offering services in more than 20 languages to their clients. This successful model is currently being implemented in Citizens' Advice Bureaux in Greater Pollok and Parkhead (in Glasgow). There has also been interest in the project from other Bureaux located in England. The Scottish Executive is providing the necessary funding for the extension of this programme to other Citizens' Advice Bureau offices.

### **All persons working with asylum seekers should have the appropriate skills and knowledge**

Asylum seekers are a highly heterogeneous group, with very different cultural backgrounds, educational levels and religious beliefs. They are a unique and challenging client group. Unfortunately, there are marked differences between the quality and extent of the services provided to asylum seekers in the Member States. Employers and employment services, local policy makers and members of the community are sometimes found to have a limited and distorted understanding of the situation and the legal rights of asylum seekers. All too often they are confused with irregular migrants.

Organisations and people working with asylum seekers in a professional capacity, whether through the public, private or the voluntary sector, can provide much better help if they have a good knowledge of their client group. EQUAL partnerships have helped to increase understanding and know-how by designing and delivering training programmes for those who work with asylum seekers on a daily basis.

"Becoming More Visible in Finland" developed, in collaboration with a university, a supplementary study programme for staff working in the 13 reception centres across the country. The content of the training was based on a needs assessment which was informed by both the employees and the asylum seekers living in the centres.

EQUAL partnerships placed great emphasis on both the 'hard' and the 'soft' skills of their workers. SONAS in Ireland hired outreach workers who received in-depth training to best prepare them for their future tasks, which not only included the concrete provision of information and assistance, but also to act as a cultural bridge between their clients and the host community.



*Two asylum seekers proudly receiving their certificate after having successfully completed the courses offered by the Maltese EQUAL partnership.*

EQUAL also fought hard to change the attitude and improve the understanding of other people working with asylum seekers, such as the civil servants processing their applications, the physicians that would examine them or the employment service which had to help them find a job.

EQUAL has proven that good operators are able to provide their clients with the best services and point them to the best opportunities. They can help asylum seekers to make these few small steps, moving them out of isolation and straight into society. At the same time, EQUAL has also underscored the importance of raising awareness and involving other organisations and the wider public. Public services and employers were encouraged to reflect critically on the diversity management of their organisation and the business opportunities that increased cultural understanding and diversity can bring.

More information and detailed examples of the successful approaches mentioned can be found on the EQUAL pages dedicated to the asylum seekers theme, at: [http://ec.europa.eu/employment\\_social/equal/activities/etg5\\_en.cfm](http://ec.europa.eu/employment_social/equal/activities/etg5_en.cfm)

According to European legislation, asylum seekers have the right to work if a decision on their asylum application is not taken within a period of 12 months. In only very few countries are asylum seekers allowed to start working, or to start actively looking for work, immediately. The majority of Member States require them to wait between a few months and up to one year. Some countries have placed additional restrictions on asylum seekers accessing the labour market. EQUAL has shown that employment is a truly crucial element in the integration process and empowerment of asylum seekers, as it makes them self-sufficient and puts them in full control of their lives. Even though their job might be of a temporary nature, in the case that their application is rejected, or even when only a traineeship or other form of on-the-job training can be offered, such a short period of activity is also important for their successful reintegration. EQUAL has also shown that asylum seekers can bring value to an organisation and the overall community if they are allowed to work. As the European Social Fund mentions for the first time the need to integrate asylum seekers, it will thus be very important to learn from the creative approaches to labour market insertion that EQUAL partnerships developed.

### **The usefulness of mediation with employers, employer associations, social partners and other relevant stakeholders**

Private and public employers are often not aware that they can actually hire or offer traineeships and other job experiences to asylum seekers. Those that do know this are frequently reluctant to hire them because of lengthy and complicated administrative procedures for obtaining a work permit or other documents that are required. Employers can also be hesitant to invest time and efforts in asylum seekers as they are in fact temporary residents who may have to leave the country at any given moment. Private and public employment services also struggle to help asylum seekers as they are not used to working with such a challenging client group which in many cases requires special treatment in terms of placement, support and administrative processing.

EQUAL partnerships have therefore invested enormous efforts to 'make the case' to employers, employer associations, employment services, social partners and any other persons and organisations that could play a role in getting jobs and employment experiences for asylum seekers. Nearly all projects included the direct participation of employers from the public and private sectors, as well as employment services. Lasting links were also created with local and regional authorities and with education and training institutes. Most EQUAL partnerships used mediation, with individuals approaching employers directly to introduce the project and to convince them to participate. In one case, retired managers were involved as they were able to make use of their old networks to obtain internships for asylum seek-

ers. Other approaches included lobbying, campaigning and networking. The media was also regularly involved to change negative coverage into clear and more positive reporting on the situation of asylum seekers.

ENEAS EQUAL, a Development Partnership covering the entire Spanish territory, developed collaboration agreements between different partners to help asylum seekers prepare for and find employment. One example is an agreement between a regional authority, a training provider and a public reception centre. The agreement covered language courses, the participation of asylum seekers in regular vocational training courses and the possibility of receiving a work contract after successful completion of the courses. With the help of a regional television station, ENEAS EQUAL also produced a DVD to explain the purpose and the benefits of such agreements to other employers in Spain.

**EQUAL was all about getting people into employment. Its success is all the more impressive when considering the many legal and practical obstacles that had to be overcome to help asylum seekers onto the labour market!**

EQUAL highlighted the need to identify and 'document' the skills and competences of asylum seekers, as they either arrive without any certificates or have diplomas which need to be formally recognised, which is a time-consuming process. Nearly all partnerships helped asylum seekers in the assessment of their skills, the preparation of CVs and portfolios and interview training. Several went further and

developed so-called 'matching' systems to combine demand for labour with offers, in the form of searchable databases, recruitment fairs and other types of meeting where employers and potential employees could come together. Employers seemed to be much more 'at ease' when they were also provided with some support to deal with administrative, cultural, linguistic or other problems that could arise with regard to the new employee or intern. EQUAL partnerships therefore provided interesting accompanying measures such as mentoring, tutoring and administrative assistance.

Employers took part for different reasons. While often the primary reason for hiring asylum seekers relates to economic interest, to labour shortages or to specific skills shortages, increasingly employers also consider corporate social responsibility, diversity management and intercultural learning important incentives. The EQUAL partnerships showed that company environments can change because of the presence of asylum seekers. Employers and staff changed their perception of this disadvantaged group and gained a better understanding of their situation. In many cases, employers were willing to offer longer or even permanent contracts, or to hire more asylum seekers. The hiring of asylum seekers turned in many cases into 'business as usual', rather than something exceptional or impossible. Asylum seekers became less reliant on welfare and less tempted to work on the black market for much lower salaries. More importantly, they could live an autonomous life, develop new social networks and contribute to the host society.

### **The need for creative approaches where access to the labour market is restricted**

Some Member States have placed restrictions on labour market access for asylum seekers, for example on the duration of the

employment or the type of jobs that asylum seekers can apply for. Other countries give priority for job openings to nationals and EU citizens before asylum seekers are allowed to apply. And a number of countries do not allow any access until one full year after asylum seekers have lodged their claim, which still forces people to stay inactive for a long period of time. EQUAL partnerships have taken several highly creative and innovative approaches to dealing with late or restricted access to the labour market.

In Member States restricting or substantially delaying access to employment, EQUAL partnerships focused on creating alternative forms of work experience such as traineeships, work shadowing and volunteering. This helped asylum seekers to become familiar with working norms and gain valuable experience at the same time. Employers are sometimes reluctant to offer such alternatives, as in many cases they are not aware that these are perfectly legal and feasible solutions.

The Bridges Project is a work-shadowing scheme operated in Glasgow by the ATLAS DP. Scotland is in a unique position in the UK because it is experiencing a skills shortage, its population is ageing rapidly and it has a low birth-rate. The work-shadowing scheme is open to all asylum seekers awaiting a decision on their asylum claim. Participants need to have a reasonable standard of English to participate. The work-shadowing placements are in the following fields: medicine, teaching, building/engineering, administration, legal and financial, among others. The Project sends tailored letters to potential employers explaining the work-shadowing scheme. Once a few employers had decided to participate, this had a domino effect with many others wanting to take part. A database has been set up with information on asylum seekers' occupational qualifications and the number of years of experience etc which is used to match candidates with employers. Placements usually run for 12 weeks with a minimum participation of one day a week. Through the work-shadowing experience, participants have the opportunity to learn about local work habits and cultural differences and gain valuable professional experience, which prepares them for future employment. By working alongside asylum seekers, the local community has had an opportunity to learn about different cultures and the plight of asylum seekers, thus changing public perceptions and attitudes. All but one of the employers who offered a placement to an asylum seeker through the Bridges Project have been willing to repeat the process and take on more placements. After gaining refugee status, some participants have found employment as a result of having taken part in the work-shadowing scheme - sometimes with the employers with whom they shadowed.

EQUAL partnerships have even generated new types of jobs for asylum seekers in Member States with restricted access and a tight labour market. The uncovering of niches in the labour market and the creation of new professional profiles have proven particularly successful to insert asylum seekers into employment while avoiding direct competition with citizens. As



*Employment and any other form of work experience help asylum seekers to gain new skills.*

asylum seekers can bring some unique skills and competences to jobs that nationals or other EU citizens struggle to provide, it also becomes much easier for the employer to show that relying on the national labour force was not an option.

In Germany, asylum seekers may only apply for a work permit after having spent one year in the country, but the permit is only valid in certain sectors and under the condition that no German or other EU citizen is available for the job. The TransKom partnership worked on a new job profile called 'Language and Culture Mediator' which had been developed by its predecessor, TransSpuk. The training period is 2.5 years and, following the German tradition of dual education, it includes 1.5 years of theory and one year practice. The certified Language and Culture Mediator assists representatives of the health and social sectors and their foreign patients by providing professional interpretation and socio-cultural mediation to avoid language problems and information deficits. This new profession combines specific skills and language knowledge, which means that asylum seekers not only get a qualification for a job that demands their specific background, they also contribute to their new society and help other asylum seekers and migrants.

In sum, EQUAL has demonstrated that, in order to find employment for asylum seekers, projects and partners need to be flexible and willing to experiment with new approaches. Traineeships and voluntary work can provide that first and important step towards gainful employment for asylum seekers, and convince employers to offer a real work contract, where this is possible. New job profiles and the identification of labour market shortages help to focus efforts to get asylum seekers into employment and to avoid tension with the local or wider community.

*Matching skills with the demands of today's labour markets is a critical challenge for Europe. It is essential that the need for up-to-date skills is met, if Europe is to achieve its goal of becoming the most competitive and dynamic knowledge-based economy in the world. But Europe is far from a homogeneous world region, which makes it even more challenging to identify and manage where, and in which sectors, skills are most needed. EQUAL has experimented with several interesting approaches to identify, recognise and validate in particular those skills that are not evidenced by certificates or other formal proof.*

It is expected that the changing demographic situation in the EU will increasingly lead to skills and labour shortages, as well as competition for certain skills. Member States have already started devising special schemes to attract certain categories of workers from other countries and tried encouraging their citizens into certain types of education and training pathways which meets the demand of their national labour market. But it is equally important for Member States to realise that some of these much needed skills and resources are already available, but not yet recognised.

Vulnerable groups, such as ethnic minorities, asylum seekers, migrants, disabled and older people have many relevant non-formal skills. Others are unable to provide certificates or evidence of studies or employment and hence are unable to proof their skills to potential employers. Too often, these groups take part in education programmes or employment situations that do not make use of their real potential or which cannot accommodate their strong ambitions. Additionally, people from outside the EU may not know exactly what competences and abilities are considered important in the new country and unaware what specific qualifications are necessary to participate in certain education, training or professions. Some groups, such as older people, tend to shy away from new learning and employment opportunities, fearing new technologies or simply considering themselves to be 'too old' to make a drastic change in their professional lives.

The recognition and validation of the skills and qualifications of persons from such groups is crucial for effective socio-vocational integration and the maintenance of a competitive economy. Their acknowledgement presents, however, a true challenge in itself. Skills audits, or skills assessments, are an effective means of highlighting the skills available and identifying training requirements. Furthermore, skills audits can also help in tackling prejudices and raising public awareness of the actual potential and difficulties of certain groups, such as the problems asylum-seekers experience, but also the knowledge and experience that older people can bring to the workplace.

In response to the challenges associated with skills recognition, a number of EQUAL Partnerships have developed,

piloted and applied new methods and tools to recognise, validate and assess the skills and abilities asylum-seekers have to offer. A range of positive achievements have been observed through the introduction of skills audits, including;

- Asylum seekers and migrants better understand their position within the labour market through personally constructed profiles.
- Most people find easier access to education and training resources or to the labour market which corresponds to their expectations and ambitions.
- Disadvantaged individuals are better matched with appropriate job opportunities.
- Public costs, for example welfare, are reduced when a participant has found work.

#### **Empowering people through skills**

Acknowledging the skills that people have and actively involving them in their own skills audit can empower them to take up opportunities and participate in local communities. Indeed, applying skills audits as soon as possible to newcomers, such as asylum seekers, enables communities to benefit from vulnerable groups becoming fully self-supportive, much faster than may have done otherwise.

Under the first round of EQUAL, the National Institute of Adult Continuing Education (NIACE), one of the partners of the EQUAL Partnership ASSET UK, developed and implemented a skills audit instrument. The skills audits looked at the skills and qualifications of asylum seekers living in the East Midlands in order to determine the potential contribution they could make to their local community, and was undertaken with almost 1,000 asylum seekers. Results showed that a high number of asylum seekers have qualifications ranging from basic schooling to higher degrees, including vocational and professional qualifications. Many had employment experience before coming to the UK, and the majority of those surveyed spoke more than one language.

Skills audits provide a valuable opportunity for people to have a concise record of their competences and identify any training needs. Validating the skills of persons with significant experience and tacit-knowledge is essential in today's economy. Through formal recognition of someone's skills and abilities, skills audits can help remove the pitfalls of inactivity and can integrate groups into the labour market.

The Investing in People EQUAL partnership in Italy supported companies in a local Province through the provision of an innovative approach to the competences of their workforces. The approach was based on a Validation of Prior Learning system called 'Assessment of Existing Competences of Vulnerable Workers'. The system enabled the competences acquired by older and disabled workers to be validated. A portfolio of competences was then created that contained evidence (projects and videos for example) of educational and professional experience of the worker concerned. A list of competences the worker had acquired was also included in the portfolio. Finally, individual training programmes were developed to address any knowledge gaps identified during the audit process.



























