

Adaptability Peer Review  
EQUAL Solutions to Challenges of Adaptability  
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SUMMARY REPORT



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## Foreword

This report is a summary of the results of the conference EQUAL Solutions to Challenges of Adaptability – Adaptability Peer Review which took place in Warsaw between 3rd and 4th of October 2006. During the conference sixteen EQUAL Development Partnerships from seven European countries presented their activities and results. The most important part of the conference was devoted to the discussion on the various issues crucial for the successful designing and implementing solutions to the challenges of adaptability. All the sixteen partnerships presented their results during the sixteen workshops in four thematic fields: age management, IT skills, flexible work management and restructuring.

The report consists of four chapters. First chapter is devoted to the issue of adaptability. We present the most important facts for European Union, give an overview of the approach to the adaptability concept in EU's strategic documents and present the aims of EQUAL initiative in this regard. Second chapter presents all the Development Partnerships, giving information on their aims, activities and results. Third chapter gives a summary of the workshops and tries to determine which activities are the most successful and which results and products could be successfully mainstreamed and disseminated. Fourth chapter brings conclusions, with an open list of EQUAL solutions to the challenges of adaptability and set of recommendations for the next programming period.

We hope that experiences gathered during the conference and summarised in this report will be useful for all potential innovative partnerships during the next programming period. At the same time we would like to express our gratitude to the Development Partnerships and their representatives who devoted time to present their achievement and submit the information on their activities, to the facilitators of the workshops and to all the participants of the conference for their comments and suggestions.

# 1. Challenges of Adaptability

This section is designed to introduce the issue of adaptability and define the economic and political background of the activities undertaken by the DPs participating in the conference. First section provides basic information for the European Union on the adaptability issue – in context of the labour market developments. Second section presents the importance of adaptability concept in the EU's strategic documents, while the third one brings an overview of the aims of EQUAL initiative.

## 1.1. Adaptability and economic change in European Union

The adaptability of the labour market is the ability of companies and employees to adjust their economic activities to the changes taking place in the global economy. Among such changes we can observe continuous technological development, globalization accompanied by the liberalization of trade, which results in higher competition and changing economic, its legal and cultural environment, including such processes like ageing and international migrations. All these processes have an impact on the actors of the labour market and result in constant necessity of adjusting to changes. Both employees and employers, in order to stay in the market, should move in the same direction as the economy, which is gradually more opened, innovation- and knowledge-based. However, the ability of players to recognize or anticipate the change in time and to adjust to it varies substantially. The diversification in adaptability level results in an unequal distribution of costs and benefits of adapting to changes.

The adaptability of the labour market to ongoing changes in global economy is defined by three components: the adaptability of employee, of employer and of the labour market institutions. Only the combination of all three of them results in high effectiveness of the labour market.

### 1.1.1. Knowledge and skills

The level of skills and knowledge is a decisive factor in the position of an employee on the labour market. Human capital does not remain constant over a lifetime of an employee – it undergoes different changes due to the alterations of mental and physical abilities of a worker on one hand and to the development of the new technologies, which entails the change of the value of different skills, on the other.

De Grip, Van Smoorenburg & Borghaus (1997) have developed the typology of evaluating human capital obsolescence. Following this typology we can distinguish technological and economic obsolescence of skills. Technological obsolescence can be identified as:

- Wear of skills obsolescence – due to an ageing or an illness specific to a job;
- Atrophy of skills obsolescence – due to an insufficient use, e.g. long-term unemployment or the employment not requiring attained education;

while economic obsolescence can be attributed to:

- Job-specific obsolescence – due to technical or organizational change in the production; although skills remain at the same level they are no longer relevant to the practiced profession.
- Sector-specific obsolescence – due to a shift in demand for a specific job. It can occur as a result of a decline of the whole branch.
- Firm-specific obsolescence – due to dismissal of a worker. An employee attained a particular set of skills, which are not marketable outside the environment of the firm.

Both technical and economic obsolescence is being observed on the labour market of EU25. The risk of the wear of skill obsolescence is higher because of the ageing of European population. Globalization, economic specialization and the transformation towards knowledge and innovation-based economy entails an ongoing restructuring process, which also has an influence on the labour market by increasing the technical obsolescence. As a result, the value of the human capital decreases on the market as the same set of skills is no longer demanded. It can entail long-term unemployment or withdrawal from the labour force of disadvantages groups, particularly ageing employees.

## 1.1.2. Restructuring

The restructuring is defined as the reshaping of production at an enterprise level. This process is determined by the factors from the external environment, which have an impact on an enterprise. It is often perceived as a negative change as it has an influence on the employment level. The main aim of the restructuring is however to adapt to different changes, which emerged in the economic, social or legal environment. The successful restructuring facilitates the survival of an enterprise and the enhancement of its competitiveness. Nevertheless, the restructuring incurs costs. In order to diminish them the efforts should be undertaken to reemploy the redundant workforce.

The processes of restructuring are the results of following developments in the global economy:

- Technological change, the movement toward an innovation-intensive production process. In consequence, an industry must implement new solutions, which decrease the costs of the production. Otherwise, it will become uncompetitive, what can entail a bankruptcy.
- The development of the information and communication technologies. On the one hand it makes the production cheaper and faster, on the other it induces the constant quest for the high-skilled labour force.
- Change in the aggregated consumer demand. The ageing population, the emergence of the new economies and the higher sensitivity to economical issues have shifted the global demand. If the restructuring does not take place it can occur that the supply is not overlapped by the demand.
- Globalisation process – increasing flow of goods and capital – which increase competitive pressure and encourages companies to relocate the production to the other countries.

The ongoing restructuring process entails two implications for the labour market. The first one is the constant destruction and creation of jobs and the shift of workplaces between the sectors on the European market. The second one is a result of the constant implementation of innovation, which causes the high-skilled labour-intensive production. While the first one can be described as a quantitative change, the second one is a qualitative development.

In the period 1997-2002 a quantitative change was observed as about 30 million jobs were created in EU-15, what was the net result 44 million rise in services and the destruction of about 7 million in both agriculture and industry. This changes show that the jobs are being moved to the tertiary sector at the expenses of the primary and secondary. Almost in the same period of time EU-15 witnessed qualitative changes in the employment. Between 1998 and 2003 the employment of low-skilled labour force increased by 2,2%, while the number of the intermediate-skilled employees rose by 14,2% and the highest growth was witnessed in the employment of the high-skilled labour force – of 25,1%. As a result the participation of the low-skilled employees in the total employment fell, confirming the tendency of moving towards the strong reliance on qualified workforce.

The restructuring process has affected to the greater extent the NMS, where in the nineties it caused the net decrease of the employment rate. In EU-15, the restructuring process resulted in the greater flows within employment and not with the net fall of the employment rate.

According to the quantitative change the restructuring process entails more job creation than destruction on average in the EU-15 between 1996 and 2005 and for the NMS between 2003 and 2005. However, the workers made redundant are often not admitted to the newly created jobs. It is the result of the fact that the skills of the dismissed workers do not meet the expectations of the new vacancies. The costs incurred by the restructuring process are often to be borne by most vulnerable workers, among which low-skilled and older are to be named. In order to achieve the aim of greater adaptability, which is based not only on the flexibility but also on the security pillar, the social cohesion must be sustained. The efforts should be undertaken in order to bring back to the employment the workers, who were excluded from the benefits carried by the restructuring process.

Restructuring might be much more painful in the specific region and sectors than in the other. The reason behind that is the fact that costs and benefits are not distributed equally between sectors, regions and employees, e.g. while the heavy industry might be a subject of the job-destructing restructuring process, the new jobs might be

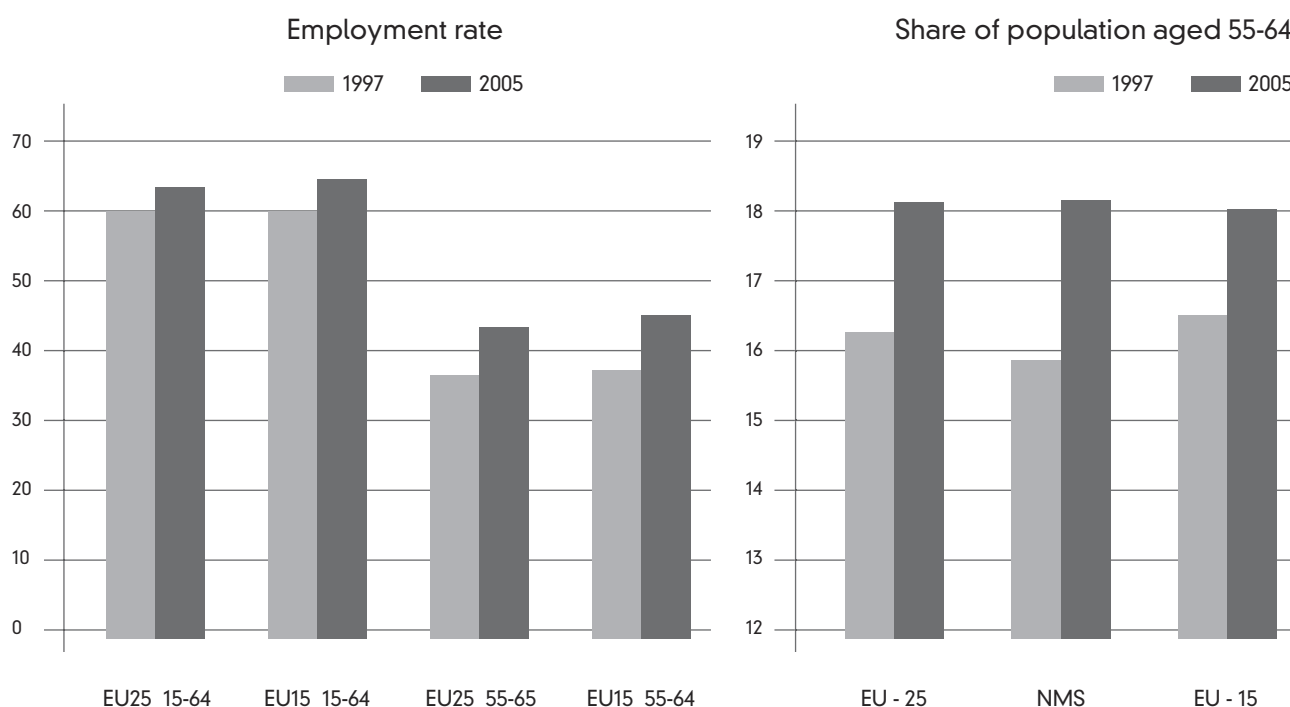
created in the advanced technologies industries. Although on the national or European level net change might be positive, still heavy industry workers are losing their jobs and their chances to find new employment might be minimal. Additionally, costs and benefits might not be equally distributed over the time.

The restructuring process might be facilitated by taking into account different measures, including:

- The implementation of policies, which would enable the economic and technological development and enhance the ability of anticipation of the resulting changes. This aim can be achieved by enhancing the investment in R&D, and reinforcing the use of ICT (Information and Communication Technologies). Furthermore, it is crucial to enhance the partnership among companies when it comes to the revising the development of competitiveness, the addressing of potential environmental changes and development chances. These measures are of the first importance for the declining branches. Such steps would enable the follow-up and prevent from the collapse of the whole branches. Higher investment in R&D and the stronger partnership could entail the spillover of innovation. Further dissemination of innovative solutions would be enabled by the establishment of the technological platforms, where the players involved could verify the state of ongoing research and the direction of the developments.
- The introduction of instruments, which facilitate the fast reaction to the unforeseen developments. Under this target the regulatory modernization and the simplification must be introduced. The issues like the modern working organization, flexible working hours, promotion of job mobility, which would enhance the adaptability of workers, should be concerned. The promotion of the trainings, life-long learning and the investment in human capital is of great importance in order to move towards the knowledge-based economy, which is more able to adapt to changes.
- The recognition of the importance of the role played by the social partnership. The public debate should be sparked. The corporate social responsibility calls as well for the reinforcement. It is crucial to introduce trainings aimed at those affected by the restructuring process, which will be tailored to their specific needs.

It is argued that an employer should carry partly the burden of dismissing the worker. Therefore, policies are being undertaken, which incorporate the participation of an employer in bringing the redundant workers back into employment. In *Global Industrial Restructuring* OECD gives an example of an agreement on restructuring process of Danone company. The agreement encompassed the commitment between the Trade Unions and the company on the number of redundancies, training possibilities and compensations for the dismissed workers.

### BASIC EMPLOYMENT AND POPULATION INDICATORS



Source: Eurostat

### 1.1.3. Ageing population

The population of EU25 is ageing, i.e. the proportion of older people in the population is increasing. This process occurs as a result of two demographic changes. Firstly, the fertility rate within EU is dropping, mainly due to the women's entry into labour force after Second World War and new preferences in family structure. Secondly, the life expectancy has increased thanks to the better living standards and healthcare. Moreover, baby boomers generation, born between 1945 and 1965, is heading currently towards retirement.

Although the enlargement of EU has made the European population younger, the change was not profound, since in the NMS the process of ageing is to be seen as well. Between 1997 and 2005 the proportion of population aged 50-64 years rose by 2 percentage points in EU-25 and according to prospect is going to rise further. At the same time employment level among the population aged 55-64 is 20 percent points lower than the overall employment of population aged 15-64.

The wide gap in employment level across the age group illustrates disadvantaged position of the older employees on the labour market. Furthermore, the high share of long-term unemployment among unemployed aged 55-64 suggests that the significant part of those losing the job at the older age experiences difficulties with coming back to employment.

The low level of skills explains a substantial part of the lower employment level of older people. The strong relationship between the level of education and age is observed in EU-25, as the percentage of the population without upper secondary education increases when older cohorts are taken into account. The ability to develop is perceived to decrease with age as well. The relationship between the trainability and age has been so far not well understood and needs further research, there is some evidence however that the trainability declines with age, if a worker had not acquired new skills during the professional life.

Secondly, the skills offered by older employees sometimes do not reflect the expectations on the part of an employer. Older workers are not as capable of keeping the pace with changes occurring in economy and to adapt their skills to the changing expectations. Currently, their participation rate in the life-long learning, which would enable an employee to enhance own trainability and adapt to the changes, decreases with age. The indicators of life long learning across UE-25% stay far from the target set in the European Employment Strategy. Although EU-25 witnessed a modest increase from 7,9% in 2000 to 9, 9% in 2004. Only the following countries have, so far, reached the target of 12,5%: Denmark, Netherlands, Slovenia, Finland, Sweden and United Kingdom.

The problem of employability of the older workers is also related to the fact that employers have no enticements for investment in the training of older workers, which is a result of two factors. Firstly, employers prefer to invest in younger workers. They anticipate higher returns on the investment in the young as a result of e.g. the lower wage level for inexperienced workers or higher expected trainability of younger workers. The younger and prime age cohorts are in average better educated, therefore are more likely to achieve more trainings. Secondly, the expected period of potential pay-off from investments in case of older worker is short, as the average exit age out of the workforce amounts to 61 years for EU-25.

Moreover, the legislation, which varies strongly across EU-25, has worsened frequently the older workers' competitiveness on the labour market e.g. an employer is made to cover healthcare expenses, which are higher for the ageing workers. The restrictions established by the law incur higher costs of employing an older worker putting him or her at a disadvantage on the labour market. Simultaneously older workers expect a higher position in hierarchy than their younger and inexperienced colleagues, which entails higher expected level of wages.

Although older workers could pass knowledge to younger employees, employers often do not recognise that fact and do not facilitate knowledge transfer within the company. The low level of employment among the age group 55-64 is also an illustration of poor knowledge-management in the companies. In the Employment in Europe 2003 it is argued that young and old workers are complementary. The idea is backed by the fact that outflows of the older workers out of the employment does not coincide with the inflow of younger workers.

Lastly, employers do not recognise the danger that an ageing population will result in the shortage of the labour

force in companies, which do not have at their command employees from diverse age cohorts. As the baby-boomer population has already started to retire and their outflow from the labour force is not counterbalanced by the inflow of young workers, the companies will have to face the sudden shortage of labour supply, if incentives for older workers to stay in the workforce are not undertaken. According to the prospects, the number of employees aged from 50 to 64 will increase by 25%, while those aged 20-29 will decrease by 20% over the next 20 years.

The process of ageing will have substantial influence on the EU economies. The ageing of the population is accompanied by other developments: evolution toward innovation-, and knowledge-based society, ongoing restructuring process and continuous technological development. Moreover, each of the named developments has been accelerated over the latest years and, according to the prospects and expectations, they are going to increase even harder. The alteration of the environment in which the main players of the labour market operate implicate that they should adapt to the changes in order to remain on the market.

In accordance with the above discussion concerning the ongoing process of ageing, there are different examples of the solutions to be undertaken in order to improve the adaptability of both employer and employees.

Between 1997 and 2000 Sweden launched an Adult Education Initiative. It successfully resulted in providing 800 thousand adults, who encompassed the older age population, with off-charge full-time secondary education. The initiative was aimed mainly at the unemployed people. In 2003 Finland implemented Neste Programme, which target was to provide the employed age-group lacking the upper secondary education with opportunity to improve the vocational qualifications. Another objective was to reinforce the ability of using information and communication technologies. The UK "Age Positive" campaign has been introduced to encourage the diversification in age at a workplace.

Another countries have introduced some policies improving the older worker's position on the labour market. In the Netherlands tax deductions for employing the elders were introduced. In Germany the Federal Plan for Older workers was implemented, which encompassed enticements for older workers to set senior citizen offices, which were to give the elders possibility to share the knowledge they have accumulated. In France a dismissal of an older worker entails higher contributions to unemployment insurance by the employer.

The most important challenges are still to be met by the European countries. Firstly, the pension funds need to be reformed. Existing pension and retirement schemes discourage employers from investing in the older employee's training and the employees are encouraged to early withdrawal from the labour market. Secondly, the legislation which results in higher labour costs for older workers need to be revised. Thirdly, the training targeted at the low-skilled employees should be introduced and the life-long learning promoted.

## 1.2. Adaptability in EU strategic documents

### 1.2.1. European Employment Strategy AD 1997

The processes of globalization, economic development and technological innovation require continuous adaptation to changes of both: employers and employees. The task of adaptability was included already in the European Employment Strategy, which was introduced during the Luxemburg jobs summit (1997). The original guidelines for the member states employment policy included: improving employability, developing entrepreneurship, encouraging adaptability of business and their employees and strengthening the policies for equal opportunities.<sup>1</sup> Encouraging adaptability referred to the challenge of modernization of work organization and forms of work. To reach this aim, particular recommendations were defined. Social partners should be involved in negotiation of the agreement in order to modernize the organization of work, with the negotiation taking place particularly at the sector and enterprise level. The modernization of work requires adopting flexible working arrangements, which will combine productivity and competitiveness. The work flexibility has to be ensured with the consideration of the security of workers. In concrete, new forms of contracts should be incorporated into legal systems of the member states, types of contracts which would be adequate to the increasing diversity of forms of employment. These new regulations of labour law should be combined with proper security regulations. The new kinds of working contracts should enjoy proper occupational status corresponding with the needs of business.

According to the European Employment Strategy the issue of adaptability in enterprises requires examination of the obstacles to investment. Particular attention should be paid to the tax obstacles in human resources investments. The obstacles could be overcome through i.e. the development of in house training. The barriers in employment should be overcome by proper legal reforms. Law should be one of the instruments of introducing the economy's structural change in the market.

The first five years of the strategy were planned to bring significant progress in the field of employment. The evaluation of the actions undertaken within this period enabled identification of further issues and challenges.<sup>2</sup>

### 1.2.2. Lisbon Strategy AD 2000

The European Employment Strategy has become a key point of Lisbon strategy, which assumed for EU *to become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion*.<sup>3</sup> The analysis of the economic situation in the member states of EU included in the Lisbon strategy expresses the necessity of transformation of EU economy and society. These reforms became indispensable under the conditions of the processes of globalization and transition into the new knowledge economy. Among EU challenges the Lisbon strategy names: the employment challenge, main social challenges, such as: poverty and social exclusion, the need for much greater dynamism within the Europe and economy, the challenge of the knowledge economy.

The employment challenge was connected with high unemployment rate, which at that time reached 10% of the European labour force. The diagnosis of the labour market showed the following disadvantageous features of the labour market: a gender gap (only half of EU women were employed), services gap (low level of employment in services sector), marked regional imbalances, long term structural unemployment, a skill gap (particularly in reference to IT) and an age gap (low level of employment of 55-65 age group).

According to the European Commission the social challenges come from wasted resources. The wastage in economy refers to i.e. ill health, crime and related costs. Other costs are related to the under-use of available human resources. The challenge of social inclusion should be considered by the policy makers within the EU member states. The process of ageing European population brings the challenges not only within the labour market, but also in terms of the sustainability of welfare and pension systems.

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<sup>1</sup> Commission adopts Guidelines for Member States Employment Policies for 1998, Brussels, 3 December 1997.

<sup>2</sup> Impact Evaluation of the European Employment Strategy, Technical analysis supporting COM(2002) 416 final of 17.7.2002 – Taking stock of five years of the EES.

<sup>3</sup> The Lisbon European Council – an agenda for economic and social renewal for Europe. Contribution of the European Commission to the Social European Council, 23 – 23th of March 2000. Brussels, 28 February 2000.

The challenge to dynamise the European economy comes from the fragmentation of markets, shortage of small and medium-sized companies, shortage of enterprises and entrepreneurs, barriers in capital markets, including low availability of risk capital. The EU economic research is delayed in comparison to its main competitors, and the implementation of new ideas is frequently very time-consuming.

### 1.2.3. Wim Kok's Employment Taskforce Report AD 2003

The report *Jobs, Jobs, Jobs – Creating more employment in Europe* of the Employment Taskforce (2003) chaired by Wim Kok takes a critical view on the Lisbon strategy. The report underlines the necessity of increased adaptability in the labour market. It is a challenge brought by the process of globalization and acceleration of technological innovations. Restructuring processes have to take place not only in the traditional industries, but should be implemented in all sectors. Enterprises must be ready to react to appearing changes such as: ageing workforce, shift in demand of goods and services. They should aim at creating an environment which will be favourable to new businesses. Referring to the situation of workers, adaptability should consider also the transition from education to work, combination of work with training programs, coping with career breaks, shift in working statuses, transition from work to inactivity. The ability to respond to the rapid changes is also enhanced by the flexible forms of employment and migration of workers which should not discriminate employees in terms of their security in the labour market.

The Wim Kok's report includes the following recommendations concerning increasing adaptability: fostering new businesses, development and dissemination of innovation and research as well as promotion of flexibility combined with security on the labour market. The development of enterprises and sustainable business is possible only in a friendly environment. This can be achieved through a reduction of administrative and regulatory obstacles and proper fiscal system. The authors of the report point out, that the support for the development of SME's requires developing advisory services for business start-ups, providing help in managing human resources and financial risks, increasing managerial training and vocational education, reviewing the insolvency law and setting the wages in the employment-friendly manner with reference to the market situation. The maximization of job creation can be reached by establishing employment friendly system of remuneration, taxes and other related costs for the employers.

The factors which are inevitable for the increase in employment as well as economic growth are research and innovation. Various actors should be encouraged to carry out research and spread the results. The innovatory strategies should be elaborated by enterprises themselves, but also academic research oriented institutions and public authorities. For the effective spread of innovation, networks and partnerships should be encouraged. Among other recommendations of the report in terms of innovation there are: spreading the use of ICT, fiscal and legal incentives to encourage increased levels of private investments in research and innovation, cooperation and mobility of researchers.

The flexible forms of employment bring the issue of security in the labour market. Flexibility of labour market requires the implementation of diverse contractual and working arrangements. The flexible labour market cannot stand in contradiction with the possibility of a worker to stay and progress in the employment market. The flexibility of labour can be ensured under standard contracts after their examination and adequate adjustment which will make them attractive both for employers and workers. However, other forms of contracts should be considered in accordance with the needs of both parties. The irregular forms of work, career breaks, trainings, transitions between working statuses, mobility should not aggravate the position of worker within the social security system. Other factors identified in the report as fostering flexibility in labour market are: temporary work agencies which are effective and attractive intermediaries in the labour market, promotion of the use of ICT and working time flexibility, raising the attractiveness of part-time work.

#### 1.2.4. New start for the Lisbon strategy AD 2005

The communication<sup>4</sup> to the spring European Council 2005, so called “New start for the Lisbon strategy” was a response to the Wim Kok’s report.<sup>5</sup> The author of the communication, President Barroso quotes Wim Kok’s statement, that “*The Lisbon strategy is even more urgent today as the growth gap with North America and Asia has widened, while Europe must meet the combined challenges of low population growth and ageing. Time is running out and there can be no room for complacency. Better implementation is needed to make up for lost time*”. The renewed Lisbon strategy is planned to focus on growth and jobs. The main aims are:

- Europe as a more attractive place to invest and work
- Knowledge and innovation as the beating heart of European growth
- Shaping the policies allowing our businesses to create more and better jobs

The communication includes numerous recommendations in order to be able to arrive to the above mentioned aims. One of them is to increase the adaptability of workers and enterprises as well as the flexibility of the labour markets. Both features are indispensable for the promotion of the productivity growth and facilitation of job creation in the fast developing sectors. The main sources for job creation are small and medium enterprises as well as new firms. The need for adaptability is connected with the need for increasing flexibility combined with security. Adaptability refers also to the wage labour costs, which should not exceed in line with productivity growth over the cycle. The wage costs should be adapted to the market situation. The adaptability challenge requires assuming a multidimensional approach and mixed policy, avoiding the general solution directed to all kinds of labour market institutions, which would be ineffective.

The challenge of adaptability is still present in the EU documents and policy recommendations. The guidelines for Lisbon strategy “Growth and jobs” programme for 2005 – 2008 are divided into two parts. First one concerns recommendation on broad economic policy and enhances following issues: macroeconomic policies for growth and jobs, macroeconomic policies creating the conditions for more growth and jobs, ensuring a dynamic and well-functioning euro area, microeconomic reforms to raise Europe’s growth potential, making Europe a more attractive place to invest and work and knowledge and innovation for growth. The second part – employment guidelines aim to: attract and retain more people in employment and modernise social protection systems, improve adaptability of workers and enterprises and the flexibility of labour markets, increase investment in human capital through better education and skill.<sup>6</sup>

The future actions in terms of adaptability are still focused on the adoption of modern forms of work and its combination with security. The two factors need to be taken into account in order to take care of the interests of both parties: companies and workers. However, the issue of the new forms of employment and flexicurity are important also for prevention of emergence of segmented labour markets and for the reduction of undeclared work. The process of adaptability, introducing new technologies might be disruptive in its implementation, but it is also a great opportunity. Increasing flexibility of enterprises and workers will enable the possibility to respond to sudden changes in the demand for goods and services, and this in the effect will lead to greater competitiveness, growth and employment. The flexible forms of employment must consider increasing demand for job quality, worker’s personal situation, family situation, and ageing workforce.

The adaptability of workers is connected with the increasingly diverse and irregular working patterns. A number of transitions of worker have to be carried out throughout a lifecycle. The innovatory technologies adopted in rapidly changing economies require the capacity to deal with Information and Communication Technologies (ICT) readiness for lifelong learning. The features of contemporary employment market encourage also greater geographical mobility of workers for better access to job opportunities.

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<sup>4</sup> Communication to the spring European Council Working together for growth and jobs A new start for the Lisbon strategy Communication from President Barroso in agreement with Vice-President Verheugen Brussels, 02.02.2005, COM (2005) 24.

<sup>5</sup> *Facing the Challenge - The Lisbon strategy for growth and employment* report from the High Level Group chaired by Wim Kok, November 2004, which is not the report we mention in the subsection 1.2.3., but much broader report on the Lisbon strategy. In regard of the labour market, conclusions of this report were consistent with the conclusions of the *Jobs, jobs, jobs* report.

<sup>6</sup> Integrated Guidelines of Growth and Jobs [2005-2008] including a Commission Recommendation on the broad guidelines for the economic policies of the Member States and the Community (under Article 99 of the EC Treaty) and a Proposal for a Council Decision on guidelines for the employment policies of the Member States (under Article 128 of the EC Treaty) (presented by the Commission), Brussels 12.4.2005, COM (2005) 141 final 2005/0057 (CNS).

### 1.3. EQUAL as a tool to enhance adaptability

According to the first Communication from the European Commission to the member states establishing the guidelines for the Community Initiative EQUAL (14.04.2000) the aim of the initiative is “to promote new means of combating all forms of discrimination and inequalities in connection with the labour market, through transnational co-operation. EQUAL will also take due account of the social and vocational integration of asylum seekers” (art 1 of the communication).

Thematic fields (pillars) for the first call for proposals were following: employability, entrepreneurship, adaptability and equal opportunities for women and men. Referring to adaptability the communications gives proposed guidelines for its implementation:

- Promoting lifelong learning and inclusive work practices which encourage the recruitment and retention of those suffering discrimination and inequality in connection with the labour market;
- Supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies.

In concrete, the actions within the pillar of Adaptability should be undertaken in fields of: lifelong learning, age management, ICT & knowledge society.<sup>7</sup> The pillar of Adaptability aims at adapting workers and employers to changes in the labour market. Accordingly to the above mentioned guidelines the Adaptability pillar is to deal with two broad priorities.

**“Lifelong learning”** – the first of the priorities is an effective measure in ensuring working life and extending it to official retirement age, upskilling workers in line with technological developments. It increases the economic competitiveness, prosperity and social cohesion.<sup>8</sup> The second priority **“adaptation to change and ICT”** enhances broad themes such as: adaptation of the labour market, adaptation of workers, adaptation/restructuring of the companies, corporation responsibility. The actions of the DP’s are mainly aimed at the improvement of the situation of: women, vulnerable workers, the unemployed, older workers.

The EQUAL initiative is carried out by strategic partnerships, called DPs – Development Partnerships. The funds are directed to the partnerships operating in the thematic fields mentioned above. The task of the partnership is to implement the aims of the initiative: identification of the reasons for inequality and discrimination connected with the labour market and looking for innovative solutions to these multidimensional problems. The aim should be implemented in the cooperation with interested actors and carried out through an integrated approach.

Actions funded by EQUAL are following: setting up Development Partnerships and transnational co-operation, implementation of the work programmes of Development Partnerships, thematic networking, dissemination of good practice and making an impact on national policy and technical assistance.

The Development Partnerships working on implementation of the aims of EQUAL operate in nine thematic areas. The results obtained in the first round of the implementation of the initiative are being estimated as very promising in their effectiveness in combating inequality and discrimination on the labour market. Promoting adaptability in the labour market is indicated as one of the promising practices next to dealing with disability, retaining workers longer in employment, establishing businesses by unemployed or inactive persons, the contribution of immigrants to employment and economic growth, building blocks for lifelong learning strategies, gender segregation in sectors and occupations, share of care and household responsibilities, Corporate Social Responsibility, re-integration to combat exclusion and social economy to create more jobs and enhance their quality.

The adaptability in labour market still has to face challenges of – using the language of the communication – learning “in the real word”. This expression refers to work in conditions of shortage of time, life pressures and lack of experience in lifelong learning. Recommendations in this field refer to the use of information and communication technologies in innovative locations. These reforms aim to increase the use of alternative learning techniques and are expected to transplant the family learning model into the working place.

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<sup>7</sup> Equal Success Stories Development Partnerships working against discrimination and inequality in Europe, European Commission Directorate-General for Employment, Social Affairs and Equal Opportunities Unit B.4 Manuscript completed in September 2005.

<sup>8</sup> DP thematic analysis “Equal adaptability”, Theme 3E – lifelong learning.



## 2. Case studies – description of Development Partnerships

The conference *Adaptability Peer Review EQUAL Solutions to Challenges of Adaptability*, which took place in Warsaw on the 3-4th of October 2006 aimed at presenting the Development Partnerships, which implement projects in the scope of EQUAL Community Initiative. The Partnerships presented during the conference were established in seven different European countries – Belgium, Greece, Ireland, Poland, Portugal, Spain and the United Kingdom. This chapter is devoted to the presentation of the DPs participating in the conference. Each description of the DP will include information about the DP's managing institution, other partners involved, problems identified by the DP, its solutions to the problems, outputs of the projects and their beneficiaries. It will also refer to the issues of mainstreaming, empowerment, transnationality of the project and its perspective on gender equality.

The descriptions are based on the information obtained from the DP's through a questionnaire submitted prior to the workshops, which covered all the above mentioned issues. The concepts and solutions of the particular DP were also presented during the conference. The workshop sessions were organized around the four dimensions of adaptability: age management, IT skills, flexible work management and restructuring. In every field four DPs will be presented.

As stated in the previous chapter, enhancing adaptability is one of the EU priorities. It is defined on the basis of the recent changes taking place in the European economy and labour market. The DPs, which participate in the project operationalize the recommendations of the EU through creation and implementation of their own ideas as the response to the problems identified in the EU's strategic documents.

The presentation of the DP is a source of knowledge about new methods of coping with the challenge of Adaptability. The debate around the issue and the possible solutions is needed to increase the awareness of the problems and opportunities, which would make the enterprises more effective and competitive. The matter of awareness and active attitude towards the challenge of Adaptability is significant both for the condition of sectoral and national economy as well as for individual profits. The variety and number of beneficiaries of the presented DPs prove the great social and economic meaning of the issue.

The presentation also aims at inspiring various actors to undertake measures in this field and to show that the solutions can be easily found and implemented. The descriptions involve the information about methods and instruments used by the DPs as well as procedures applied to achieve their aims. It also includes indications for potential followers. However, this issue will be analysed more in depth in the chapter 3.

2.1. →

## 2.1. Workshop A: Age management

## **Dynamism and experience – joint change piloting**

### **Workshop A: Age management**

The “Dynamism and experience – joint change piloting” DP is managed by Żory Economic Chamber in cooperation with regional NGOs, enterprises, academic institutions as well as local and professional self-government institutions.

The DP diagnosed the technological change – mainly the increasing importance of computer equipment – as one of the factors widening the competence gaps between younger and older employees within the same company. On one hand older employees do not adapt as easily as younger ones (and therefore feel insecure), on the other younger are often resistant to cooperation with the older and cannot find agreement concerning both technological and organisational matters. The detailed identification of this problem was carried out through a steered interview with persons responsible for management, questionnaires (among workers aged 50+ and -35 and management staff) and enquiry of interpersonal relationships. Other methods such as: documents’ analysis, observations, meetings etc. were a supplementary element in the process of defining the problem.

The main DP’s result is a model of the process of introducing changes in the organization. The improvements which can be achieved by the company thanks to the implementation of the model are as follows:

- improvement of IT skills of employees above 50 years old (50+);
- improvement of intergeneration relations (between younger and older employees);
- improvement in the transfer of IT knowledge and lifetime experience between older and younger generations of the employees.

It is important to notice, that aim of the model is not only providing older workers with skills (mostly IT skills), but also introducing a mentoring formula, which in is understood as the introduction of new employee into rules regarding organization. This introduction is performed by senior employees who are more experienced and older.

The supporting products prepared within the project are: the programme of preparing organization to the implementation of the model (based on sociological and psychological research results), the programme of implementation of the model in organization (described in particular steps sequences) and handbooks, guidebooks for organizations, trainers, beneficiaries/participants of the model.

The time needed for the implementation of the model in organization exceeds 12 months. This estimation involves an indispensable pause to evaluate persistence of implemented results. The cost of implementation depends strictly on the number of people participating in the model. The model is universal and possible to put into practice in all small, medium and large organizations which at least a dozen employees at the age of -35 and 50+ working in intergenerational teams. It is possible to implemented the model in administration, companies, non-governmental organizations. The implementation requires usage of IT skills.

The implementation of the project might meet some obstacles. Among the most possible is the resistance to changes of employees 50+. Other difficulty might occur when the management staff does not notice the problem of generation conflict in work environment and its result – the lack of transfer of IT knowledge and lifetime experience between employees -35 and 50+. Therefore it would be safer to implement the model in institutions recognising the need of improving the intergenerational relations. Change of the traditional attitude towards the workers aged 50+ should be implemented through the engagement of all interested parties within the company.

At every stage of work of the DP the problematic aspects of gender equality were taken into account. The problems caused by the rapid technological changes and generation conflict were particularly considered in reference to female management staff. As the result the model includes in its structure components equalizing gender opportunities (in accordance with suitable analysis of data collected in the research).

Horizontal mainstreaming of the model foresees the organization of:

- Regional conference involving universities, centres of teachers development, institutions of life long learning;
- Informative meetings and workshops for universities and institutions of life long learning.

Vertical mainstreaming of the model will be carried out at the national and regional level through informative meetings with Education, Learning and Juvenile Commission, Enterprise Development Commission, Work Commission and with the members of parliament. Mainstreaming of the results of the project will take place also through the mass-media through informative meetings and articles in the general and trade press at national, regional and local level, radio and television broadcasts, Internet etc.

The “Dynamism and experience – joint change piloting” DP has a transnational character and is implemented in cooperation with organization from Germany (WiKoM – Wissens- und Kompetenz-Management), Italy (Patto Risorse Innovazione Sviluppo Marsica Agroalimentare) and Spain (INNOV@RURAL).

## Skills Analysis

### Workshop A: Age management

The “Skills analysis” DP is managed by North Devon College. It is realized in cooperation with other national public and private partners. The general aim of the project is to influence SMEs in the recruitment and retention of older workers.

The project assumes to influence SMEs in the recruitment and retention of older workers by identifying their hidden competences. This action will raise awareness of the business actors how they can benefit of being age positive. These objectives will be reached through development of an innovative toolkit to identify hidden competences. The next step will be to carry out information workshops and seminars aimed at SMEs on using the toolkit and therefore enhancing their abilities to uncover the value of the older worker.

The project is expected to bring following outputs:

- A toolkit for analysis of skills and competence of older workers;
- Methods of delivering e-learning;
- New qualifications of employers and older workers.

The DP recognises that there are numerous skills analysis tools within the market place, which analyse personal skills in a generalised way. However, the toolkit developed by the “Skills Analysis” DP has the unique innovative features which can be sector, organisation or age group specific. The main innovation is the development of the question bank within this toolkit, which is tailored to the older workers within specific sectors. It will enable to complement the specific job based competencies which can be developed by the Sector Skills Councils. The question bank will enable the comparison of individual competences with those developed by the Sector Skills Councils. The inclusion of Sector Skills Councils awarding bodies, business organisations, SMEs and their employees to the DP is an innovative feature allowing the development of a cohesive approach to competence identification.

The toolkit can be used also to assess the actual skills that SMEs really need, as many of them do not have a training programme, HR policy and is not aware of their actual skills requirements.

## Experience

### Workshop A: Age management

The “Experience” DP is managed by Economic and Social Committee of Greece. The project is realized in cooperation with numerous partners of local and national level including NGOs, enterprises and academic institutions. The project addresses working persons of an older age (55+) with the aim to reinforce their qualifications and skills in order to sustain their occupational/professional activity.

The scope of the project is to assay innovative, practical measures and suggest corresponding institutional initiatives that will contribute to an integrated management of active ageing. In other words it aims at supporting and sustaining the employment of working persons of 55+ in Greece. The DP in its diagnose identified the need of supporting development of older workers skills within the companies, but also of the “re-skilling” and redeploying activates or even of attracting older workers to a traditionally “young” industry or a young organisation.

The implementation of the project includes following actions:

- The analysis of the current situation in the field of coping with the age structure of the workforce in the primary, secondary and tertiary sectors of the hellenic economy;
- The development of a methodology for managing active ageing in enterprises in all economic sectors;
- The development and application of supportive mechanisms (an appropriate consultation system, an effective vocational training system, adequate educational materials and methods);
- The development of social dialogue procedures and suggestion of institutional interventions.

The “Experience” DP translates and adapts a competence toolkit which was originally developed in Belgium under Equal Round 1. The toolkit will be used to analyse competencies in the retail and motor trade sectors against nationally agreed benchmarks. That will allow the development of competencies within the older workforce, as the SMEs will be able to utilise the toolkit to identify the competences of their workforce and initiate any appropriate training, resulting in SMEs becoming more competitive.

Among the expected results the authors of the project mention:

- A better knowledge of the current situation of dealing with age management;
- Synergies with other organizations in the EU, that have developed good practices;
- Involvement of social partners (trade unions, employers’ organisations, etc.);
- Pilot applications at the micro level (the enterprise);
- Proposals of solutions, recommendations for institutional measures;
- Fostering a relevant social dialogue upon active ageing and its parameters.

The project is innovatory in the combination of various supporting methods: the ultimate beneficiaries will be supported with consulting, training and mentoring applications.

The “Experience” DP supports equal opportunities in the sphere of employment in two ways. First, the suggested actions are neutral in relation to gender, and from this aspect they contribute to the embedding of gender mainstreaming. In particular, the pilot actions are expected to approach and appoint problems, which mainly are faced by women.

The project has a transnational dimension and is being carried out in the cooperation with D.P. KHEOPS (France) and DP EOLO (Italy). The international cooperation is diffused in the whole project through exchanges of experiences, practices and a number of common surveys.

## B.Sapiens

### Workshop A: Age management

The “B.Sapiens” DP is a project managed by ISQ – Quality and Welding Institute in cooperation with other national partners. The main emphasis of “B.Sapiens” Development Partnership is put on finding solutions for tackling discrimination of older workers especially in relation to micro, small and medium-sized enterprises.

The authors of the project were inspired by the fact that the existing methodologies do not address the needs of companies and their employees in regard of older workers. Older workers have very valuable experience and skills and yet they are frequently excluded from the training process and enterprise growth. All of their experience and knowledge could be used and enhanced by employing those workers as coaches for younger and less experienced workers.

Another problem which became an inspiration for the project is the lack of well qualified trainers. There is a need for trainers who would be able to design and monitor training paths in such a way that would facilitate the development of workers’ skills and enhance their performance in companies. The authors of the project notice that Portugal’s training paths are neither adapted to low qualified workers nor are they focused on the individual-company relationship.

The information about the problem, which became the reason for creation of the project come from various sources. One of them was public information about SMEs Human Resources Development (HRD) such as policy reports, evaluation reports about Training Programmes, National Programmes for Training. Each partner participated in the diagnosis of the problem with own organizational knowledge. The entrepreneurs know these gaps and constraints from their own practice. The last, but not least source of information was a national survey which was carried out through an online questionnaire. The survey concerned the attitude towards job training, coaching, age managements, equal access to HRD, knowledge management, etc.

The results of the projects refer to lifelong learning as well as knowledge management. In terms of lifelong learning the “B.Sapiens” DP succeeded in creating:

- New on-the-job training model for SMEs, supporting internal HR (specially older workers and less qualified ones);
- Professional profile for coaches;
- Training course for older coaches (e-contents, didactical games, etc);
- Handbook for older coaches.

In the field of knowledge management (KM) the “B.Sapiens” DP prepared:

- Knowledge management for SMEs – model and freeware toolkit (software);
- E-portfolio toolkit (balance of competences and training assessment);

The first step in the implementation of the project was a training course to train older workers so that they can become new coaches in the company. Further on, 2-3 months consultancy in companies took place (to ensure that older workers acquired coaches’ competencies). The financial expenses reach from 400€ to 1200€ per person, depending on the total number of employers involved.

At the current phase of the implementation of the project, the beneficiaries include SMEs (from trade sector, printing and consultancy services) and 116 workers (63 female). The concrete actions undertaken within the project, which are responsible for its success were following:

- Creation of 2 Organizational questionnaires (online);
- Discussion and analysis of the model with companies (goals, dimensions, items, actions, etc)
- Building together the tools and model, following common needs;
- Carrying out 2 types of interviews: with managers (18) and workers (98);
- Final results of diagnoses with action plan, sharing and discussing the results with other companies.

The further phase of the project foresees new validation and reengineering process with 12 more companies, coming from different sectors, it means, more than 300 workers, including their managers.

The project has significant vertical and horizontal mainstreaming effects. The vertical mainstreaming concerns Ministry of Labour and National System of Professional Certification. The ongoing contacts with Ministry of Labour aim to recognise the efficiency of this “open and personal model of training” and to integrate it as a possible solution in the next financial training framework. The DP stays in touch also with the National System of Professional Certification for the public recognition of the coaching profile as a profession and to include it in training profiles. Horizontal mainstreaming refers to HR National Association Body and other companies which want to implement the products of “B.Sapiens”.

The project takes into account the issue of equal opportunities, therefore gender indicators are integrated in the evaluation model. Some of the companies were chosen because of the potential “real lab” concerning gender perspective. The goal is to follow the progress in one company where age is a common constraint for women.

The project is realized in transnational cooperation with numerous partners from: Czech Republic, France, Germany, Italy, Ireland, Poland and Spain.

2.2. →

## 2.2. Workshop B: IT skills

## Meath Investment in Training and Employment

### Workshop B: IT skills

The “Meath Investment in Training and Employment” DP is an Irish project managed by Meath Community Partnership Company Ltd. in cooperation with other national partners. The main purpose of the project is to develop a model of partnership between state agencies, representative bodies and community groups. The partnership undertakes actions to address labour market inequality and to increase the labour market entry, participation, retention and adaptability of local employers, employees and job seekers (in particular lone parents, people with a disability and foreign nationals).

The problem was identified through a variety of ways – existing policy reports (both governmental and non-governmental) and through pieces of research carried out as part of the MITE project with agencies, employers, employees and job seekers. This research was carried out through interviews, surveys and facilitated group discussions.

The MITE (Meath Investment in Training and Employment) DP had participated in a number of exercises early on in the project, which resulted in identifying three particular beneficiary groups within the job seekers : people with disability, lone parents and foreign nationals. Many of these individuals find it difficult to access information on job vacancies. They often have difficulties in reaching the support services, and another barrier is a lack of flexible job options that can accommodate to their needs. At the same time it was identified that the agencies working with these beneficiaries are also experiencing similar difficulties in progressing their clients into training and employment.

There is a large number of small to medium sized employers and other institutions in Meath that may also be experiencing difficulties in adapting to the labour market. They have little resources available to invest in identification and response to the needs that they may have in relation to human resources and training and development issues.

The intended material product of the “Meath Investment in Training and Employment” DP project is a website/ online facility supported by a web of a mobile phone communication. The main aim of the service is to support the exchange of information between potential employers and employees (information on vacancies and job seekers). The technological infrastructure needed to implement the results of the project is a website facility and the latest communication technology which allows text messages to be sent from the website to the registered users. This will allow users, many of whom may not have regular access to a computer, to receive updates from the website. “Drop in centres” are also needed for people who wish to use the service itself or additional help and advice. Other agencies and bodies need to be involved in addition to job seekers – employers, training and educational providers etc. In the light of the specific needs of some of the client groups (e.g. people with disability and foreign nationals in particular), some resources that may need to be invested include translation services and disability proofed website access etc.

The phase of development of the actual basic infrastructure and its implementation takes six months. The total time needed for the implementation of the project is still difficult to estimate, as the project is in its early phase. There is a significant time investment required to promote the service and to ‘sell it’ to the different agencies, bodies and individuals that need to be involved.

The beneficiaries’ group include agencies (state and community & voluntary agencies with a training and employment remit), employers (especially small to medium sized enterprises), employees (particularly in relation to training interests and needs that may have) and job seekers (in particular people with a disability, foreign nationals and lone parents). The tool is also very applicable to other target groups.

The service has at its core the principle of equal opportunities in terms of labour market adaptability. In essence it is bringing a service to the people who would be finding it difficult to access any of the established service supports. In terms of gender, one of the beneficiaries' groups of the project involves lone parents, who are a predominantly female population. One of the identified needs for this group is the need of flexible work options, so the service is particularly focused on identifying local opportunities for part-time and flexi-time employment. In this sense the service is trying to increase the opportunities for this target group to 're-enter' the workforce but equally to offer increased opportunities to other groups such as women returning to work, people with disability etc.

To facilitate a mainstreaming process a 'mind mapping' exercise amongst all DP members is currently being carried out. This task is directed to look at how many contacts/relationships each DP member has and how the work of the MITE project could be disseminated through these already existing avenues.

Adopting a local partnership approach to a local problem is innovative for County Meath. The authors of the project indicate following innovative features of their undertaking:

- it provides direct contact between job seekers and potential employers ready to offer a part-time and flexi-time jobs;
- it provides advice for those requiring training and skills enhancement;
- it is a free service;
- the project is directed by members of the local community;
- those advertising are local;
- the service works towards social inclusion;
- supports rural families and rural communities;
- with the necessary technology, allows direct web to mobile phone communication.

The MITE project has a transnational dimension. It has partners in France, Spain, Portugal and Germany. The benefits from transnational cooperation include the identification of common issues, sharing of ideas and examples of good practice.



## Magusine

### Workshop B: IT skills

The “Magusine” DP is managed by Les CORSAIRES. Other national partners are: GERME (University of Brussels), Interface3, Le Piment, IDU, SIREAS, HANDIPLUS, FIJ and 10 more associated partners. The general aim of the project is a contribution to new pedagogies using web tools.

The “Magusine” DP’s diagnose is that Internet is contemporarily one of educational toolkits, but there is no roadmap for teachers or trainers: everything is still to invent. Many educational networks on the net were born and died without real substantial results. The purpose of the project is to discover how to manage an efficient educational network in an autonomous way. The identification of the problem was facilitated by earlier Internet project Anima (2000-2003). Its evaluation has showed problems with technical and (mostly) pedagogical support in the long run.

The “Magusine” DP addresses this problem with the expectation that in effect the beneficiaries (professors, teachers/trainers) will possess the capacity to manage their publications and training materials on the net, within a network able to offer technical, pedagogical and editorial support to its members. The main result of the project is an effective network of 20 partners (Equal and associated partners from different sectors), animating their own autonomous web publication and working in active collaboration (experiments sharing). The support results will include a DVD video documentary, short videos/sound sequences on the website (about 30 units) and an illustrated book (100 pages with beneficiaries’ production).

The implementation of the project is based on local resources and free software. The necessary infrastructure is PC park and the Internet connection for partners and a Linux server for the network. The cost of the preliminary phase of the project amounts to 170 000 € yearly, for three years. It is a cost of web tools training, technical support, network animation and video promotion. The implementation of the result requires a period of three years. The beneficiaries’ population of “Magusine” DP project is very diverse: adults and young adults, unemployed, socially discriminated, foreign origin: 75%; females 60%. The results, however, can be used in any vertical or horizontal mainstreaming. The tools of the project are simple and can be used by any kind of public.

The project brings impressive results in terms of empowerment. The beneficiaries’ group enhances between 400 and 800 users, depending of the moment of the year. Groups had been contacted in different ways: from previous partnerships, invited partners from different sectors, selected on the basis of their ability to propose different ways to develop our program.

One of the goals of “Magusine” DP was to boost the use of the network by the women. Therefore “Magusine” includes a technical partnership with a Woman Training Center involved in the web design work. It was important to show to beneficiaries that women can deal with webdesign, PHP, CSS, video etc.

Magusine is a project of horizontal mainstreaming. The network can not grow too rapidly because of the lack of suitable human resources – the network structure should stay ‘light’ to be efficient. For this reason the project assumes inviting and training new partners, who are willing to build their own under-networks in their own field of expertise, hoping their experiments will be published and useful for everyone. Similar projects are already being carried out the by partners of “Magusine”, i.e. in Belgium, Italy.

The authors of the project perceive its result as different, cheaper, quicker and more effective than many other solutions used in the past. They conclude that they appreciate it to the fact that it was planned on the basis of the needs of beneficiaries and not from any institutional point of view. The “Magusine” DP project is being carried out in cooperation with partners from Italy, what brings a benefit in the shape of mainstreaming the objectives of the project.

## Mikrogunea: Un espacio para la microempresa

### Workshop B: IT skills

The “Mikrogunea: Un espacio para la microempresa” is a DP managed by GARAPEN – Basque Association of Development Agencies. Other national partners participating in the project are of both public and private character. Among partners there are local government institutions, NGOs and enterprises. The general objective of the project is to increase the competitiveness of the microcompanies and self-employed workers through actions directed to take care of the specific needs of those groups.

The degree of penetration of the Information Society technologies in Spanish microcompanies is below the European average. The smallest companies seem not to be aware of the value of the ICTs and their application. Therefore the level of ICT equipment and its use in that kind of enterprises is low. The micro-SMEs have difficulties with the access to financing, innovation and management of technical systems adapted to their characteristics. The situation is aggravated by the lack of cooperative spirit among the micro-companies. Such a diagnosis drove the authors of “The Mikrogunea: Un espacio para la microempresa” DP to the idea of the necessity of increasing the competitive stance of micro companies and self-employed persons in the Autonomous Region of the Basque Government. This objective is to be reached particularly through improving their access to information, improvement of processes in management and innovation, adaptability to new technologies. Additionally, the project takes into account the promotion of cooperation and associationism as key elements of business competitiveness.

The project assumes two phases of its implementation. Firstly – the development of an information portal with a knowledge management system. The portal should provide technical information useful for the micro-SME. And secondly – the dissemination of the information of interest to the companies and participating agencies.

The information portal is made up of different blocks:

- General Information – subsidies, grants, legislation, news, etc.;
- Documentation Database – all the documents incorporated in the portal are gathered and classified by different criteria;
- Other information sections – links, directories, information about agencies;
- Selective information distribution system – tool that will facilitate the information dissemination among the portal users and which will include an alert system that can be configured by each user and an electronic newsletter application that can be configured by each agency;
- Communication tools – mail lists, internal messaging system, forums, notice boards and chat for portal users;
- Portal administration module.

The expected result of the project is that it will improve:

- The competitiveness of micro-companies, through the transversal use of the ICTs;
- The competences of the managers or self-employed persons;
- The access to information by the beneficiaries;
- The use of the information and communication technologies in the businesses of micro-companies;
- The network between the Local Development Agencies.



## Entrepreneurship in the web, Internet – the opportunity for growth of competitiveness

### Workshop B: IT skills

The „Entrepreneurship in the web, Internet – the opportunity for growth of competitiveness” DP is a sectoral project. It is carried out in cooperation with numerous public and private institutions. The general aim of the DP is to increase the competitiveness of microenterprises. It is to be reached by the use of information technologies (ICT) to increase quality and widespread availability of support services, professional consultancy, information and trainings.

One of the key factors which are decisive in the enterprise’s competitive superiority is the use of new production technologies, new administrative methods, modern products and services – innovation. In case of microenterprises, their development and competitiveness on the market depends on the access to information. According to the DP’s diagnose, the access to information of Polish companies and entrepreneurs and to the specific knowledge which is necessary to compete on the market is still limited. It is dependent on the size of the company, its geographical localization and politics of supporting micro enterprises carried out by local and central authorities. One of the main obstacles of the micro enterprise development are the barriers existing in the human capital. Microenterprises are not competitive employers, therefore they frequently hire persons with low qualifications and poorly educated.

The mentioned processes and features of the Polish labour market were the inspiration for the authors of „Entrepreneurship in the web, Internet – the opportunity for growth of competitiveness” DP. Identification and analysis of the economic and educational environment of microenterprises were performed on the basis of “National Development Plan” and other governmental and research analysis and reports. The analysis was carried out in order to verify the DP’s presuppositions. It was also supported by the research which was carried out by the DP – the analysis and diagnosis of educational barriers and needs, defining the directions for the growth of competitiveness of microenterprises – the ultimate beneficiaries of the DP. The research was done with the method of diagnostic poll. The poll covered 202 companies from five sectors: timber, printing, shoe, textiles and photographic instruments industries, and enterprises working in other sectors as a control group. The research referred among others to: the training needs, activities supporting the functioning of the company, the assessment of the competitiveness and development of human resources in the investigated companies, making use of new information technologies in functioning of the company and its management.

The main outcome of the project is the model of knowledge and services transfer. It is a model which is supporting micro enterprises using an IT tool: “Internet Guide for the Entrepreneur” (“Counselling and E-Learning Training for Micro Enterprises”). The elaborated model contains solutions for above mentioned sectors, which were selected for their vulnerability to tough competition, import of products or impetuous technological progress.

The component elements of the model are following:

- The library of the professional training module programmes (the space of e-learning training) – innovative module programmes elaborated on the basis of the analysis of the results of the report “The Needs and Barriers of Micro Enterprises”;
- The library of articles, publications, web pages, examples of good practice (directory);
- E-learning counselling (the space of counselling services);
- Integration and training seminars;
- IT Tools: “Internet Guide for the Enterpriser” (“Counselling and E-Learning Training for Micro Enterprises”).

The model may be introduced in the company in the maximum time of four weeks. This time is dedicated to train people how to use the computer and the internet services, attainment of the basic technical infrastructure (if there is none) – a computer with the necessary software, and the cost of access and usage of the internet services. Under the Polish circumstances the cost of introducing the outcome in one enterprise is approximately 750 Euro.

The beneficiaries of the project are microenterprises from the chosen sectors from four regions: (voivodeships): mazowieckie, podkarpackie, podlaskie and kujawsko-pomorskie. However the beneficiaries' group can consist of the employers and employees of SMEs as well.

The project has impressive results in terms of empowerment. The ultimate beneficiaries of the project is the group of 400 micro enterprises, the owners and the employees, persons of different age, recruited from the above mentioned sectors and other various fields.

The outcome of the „Entrepreneurship in the web, Internet – the opportunity for growth of competitiveness” DP project supports gender equality. It levels the disproportions of the access to knowledge and services, both women, and men, including disabled persons, regardless of the location of the companies, time and place of using the services. The research carried out by the DP and the statistical data (taking into account the sector-specific characteristics of the beneficiaries) proved that 1 to 2 proportion of women to men among the beneficiaries should be accepted by the DP.

The outcome will be a subject of distribution and mainstreaming through: preparing publicity materials of the informational and educational campaign, publications (multimedia presentations, an educational film, leaflets, posters), workshops for media, a case study – a history of the chosen successful entrepreneur, business meetings, experts' participation in the radio programmes and a conference. It is planned to obtain opinions of institutions such as: associations of employers and employees, agencies for enterprise development, foundations and associations working for enterprise development, incubators of enterprise and innovation, business centres, municipal administration.

The DP is involved in two transnational partnerships: E.N.T.E.R.P.R.I.S.E for Europe and Transnational Experience Network: Knowledge & Organization (TENKO). Both of the transnational partnerships are composed of units from seven EU countries: Poland, Germany, Finland, Spain, Portugal, Italy and United Kingdom.

2.3. →

### 2.3. Workshop C: Flexible work management



## e-Micro

### Workshop C: Flexible work management

The “e-Micro” DP is managed by Murcia City Council. The national partners of the project are: Regional Development Agency, social economy organizations, trade unions, enterprises federations, Women Enterprises Association and a university. The general aim of the project is to improve adaptability of microfirms and their workers.

The issue which was the direct inspiration for the authors of the project is the low level of productivity of the enterprises. It is caused by frequent absence of ICT. The entrepreneurs frequently lack management knowledge, which would enable them the increase of effectiveness of the company. The additional obstacles to the development of enterprise are caused by the difficulties with combining personal and professional life by the workers.

The diagnosis of the problem allowed designing a project which will improve beneficiaries’ skills in order to guarantee their adaptability to needs brought by changes in management systems. It aims to develop management methods and modernise management in microfirms through the use of technologies, systems and processes based on ICT. It is also expected to encourage co-operation between companies as a strategy for the new economic context and as a way to remain profitable in their market. Among the activities carried out in the project there is the promotion of new organisation methods through a support in working hours flexibility formula. This will effect in a better balance between professional and personal life and increase the possibilities of staying in the market for those groups with most difficulties. Finally it is expected to improve equal opportunities for the participants, highlighting conciliation as a best business management practices, and improving access and participation for women.

The ‘e-Micro’ DP is expected to produce research instruments useful for diagnosis of the needs and further implementation of flexible work management in micro enterprises. The methodology used by the DP is expected to have universal character, giving the possibility of being used by other bodies. For this purpose a guide of good practices will be produced.

The activities which will be engaged to reach particular objectives of the project will be following:

- Skills improvement: study and research of the training needs of vulnerable workers, situation of immigrant workers, other groups facing barriers; promotional activities, training activities;
- New management methods: ICT resources centre, consulting service for business needs;
- Encouragement of co-operation: information campaign, training, promotion of agreements and support for consolidation of co-operation plans;
- Modern organisation methods: a study of time management in micro-enterprises, the detection of exemplary practices and the implantation of pilot projects, a manual on flexible time management, time management assessment and incentives for best practices in flexible working hours time management.

The mentioned actions are expected to result in an improvement of internal company relations, competitiveness and incorporation of social responsibility. Beneficiaries – micro enterprises from the region – will be provided by the DP with consulting and training activities, aiming both at increasing their ICT and management skills. Training programmes and proposals of the solutions to the company-specific problems will be delivered on the basis of the results of research activities conducted in the initial part of the project. One of the most important results – best practices guides containing description of the modern organisation methods – will be a study of the best practices derived from the project’s experiences.

The DP designed a plan of diffusion of the results. There will be a special working group created for this purpose. Among its duties will be meetings with managers and politicians, working out the image of the project, dissemination of the activities and results, organization of seminars, information on the website, edition of guides and best practice guides.

## **efez.pl – System for Promotion of Flexible Working**

### **Workshop C: Flexible work management**

The “efez.pl – System for Promotion of Flexible Working” is managed by IDEA! Management Consulting Sp. z o.o. It is worth to notice that the efez.pl partnership is in fact the cooperation of three different DPs (ElaStan, Enter and Telework) that have decided to cooperate during the dissemination and mainstreaming process (Action 3.). The main aim of their common project is the promotion of flexible methods of employment.

SMEs frequently fail to undertake activities that could increase a company’s revenue, bearing in mind that they cannot afford to hire an extra employee. The solution to these problems proposed by the authors of “efez.pl” DP project is to increase Polish entrepreneurs’ knowledge of flexible forms of employment (FFE).

The analysis of the Polish Internet shows that there are no complex services that could meet the needs of users searching for information, tools and complete solutions regarding flexible forms of employment. Thus, the creation of a FFE vortal (efez.pl) could provide businesspeople with efficient support and answers to most of their queries.

The identification of the problem was based on a market survey undertaken by individual DPs (among others by adaptus.pl and ENTER). The survey showed a distinct lack of support for entrepreneurs willing to implement flexible forms of employment and lack of sources of advice, which would suggest FFE as means for increasing company’s and work organisation efficiency.

The main result of the “efez.pl – System for Promotion of Flexible Working” DP project will be an innovative on-line System for Promotion of flexible employment, created on the basis of the vortal of flexible forms of employment [www.efez.eu](http://www.efez.eu). The vortal is the first complex and comprehensive service aimed at supporting entrepreneurs in access to knowledge and tools for implementation of flexible forms of employment. It will provide both basic information and advanced tools for effective and successful introduction of flexible forms of employment in an enterprise.

The degree to which a given feature of the vortal will be used by an enterprise will be dependent on an individual situation of an entrepreneur (company’s condition, development stage, size, etc.). The implementation of the proposed tools doesn’t require involving other institutions, hiring an external expert or any special training. The use of the vortal is free of charge. Therefore, the costs of implementing particular elements depend on i.e. the nature of the work carried out in a flexible workplace.

The project’s key beneficiaries’ group is comprised of SMEs. Additional target groups are employees of SMEs and the institutions that support such businesses (local authorities, public offices, the education sector, NGOs).

The factors which can constitute threats to the implementation of the project are the following:

- problems with supporting and maintaining the vortal after the project ends;
- ineffective promotion – lack of interest from entrepreneurs.

The scope of empowerment planned by the project is very ambitious. The authors of the project note, that the tool can be improved and more complex once linked with outputs from other DPs. After launching, the vortal will seek end-users’ advice and suggestions for improvement, which will be an important source of information about needed improvements. The main beneficiaries are SMEs in Poland. The number of SMEs in Poland is almost 4 million, of which some 1.5 million are active. It is a large group dominated by the microenterprises. The authors of the project indicate a possible problem with getting the project’s message through to SMEs in outlying and less developed regions of the country.

In terms of mainstreaming the project foresees following activities:

- The organization of conference in Warsaw concerning Flexible Forms of Employment;
- Participation in the Employment Week in Brussels (June' 07);
- The edition of a Handbook for SME's concerning Flexible Forms of Employment;
- Organization of a contest for SMEs for the best implementation of flexible working;
- Organization of a photo-competition 'Flexible workplace';
- Meetings with Members of Parliament and local authorities.

The mentioned activities will involve members of SME associations, Chambers of Commerce, labour market institutions, universities, HR companies, trade/employers' unions, guilds.

The innovative aspect of the "efez.pl – System for Promotion of Flexible Working" project is the completeness of the approach to FFE. The project addresses a wide spectre of needs, questions of SMEs related to FFE. In most programs aimed at supporting SMEs, they enroll in programs with a specific workplan and forms of support. These programs allow little flexibility and usually have strict criteria for eligibility. The DP's results on the contrary, will be easily accessible to any SME and the user will have full freedom in selecting the elements of support most appropriate to his/her situation.

The DP is active in transnational partnerships related to flexible work. Partner countries include Estonia, Hungary, Slovakia, Italy, Scotland, Ireland, Spain. The outputs of this co-operation, which will be used in the project refer to:

- the training programs provided on-line;
- best practices in FFE;
- telework exchange – the exchange is planned to create a multilingual, multicountry platform for contracting telework.



## e-change

### Workshop C: Flexible work management

The “e-change” DP is managed by INDE, Crl. (Intercooperation and Development). Other partners involved in the project are both public and private institutions. Among the issues which inspired the authors of the project were the following: the insecurity of employment, diversity of its contractual forms, the necessity of finding new models of organization adapted to enterprises, which would not exclude employees’ stability and protection.

The DP recognises the fact that professional life involves many transitions within occupations, working statuses, periods of training and unemployment. Therefore it proposes new measures of employment protection, which will help to combine flexibility with lifelong learning and measures supporting social cohesion. The mentioned issues are a matter of concern also for the governmental bodies, and were indicated in the National Action Plan for Employment. The diagnosis of the problem was supported by inquiries with entrepreneurs and workers selected from telecommunication and modern distribution sectors.

The “e-change” proposes a creation of new activity models. The project activities are conducted more specifically in the regions of Lisbon and Porto and its suburbs, although it is expected to be an intervention at national level.

The material products of the project are following:

- A guide of the conciliation practices between working time and transition management that give detailed explanation of the steps and tools used in the process;
- Mediation Guide to the constitution of the Employer’s Grouping, that will allow the employers a construction of the time-sharing structure;
- Guide of introducing alternate professional cycles and monitor transitions.

The most important part of the project is very innovative concept of Employer’s Grouping. The DP aims to develop and test this concept, which basically assumes the joint employing of one employee by two or more employers – each of them part time. Thanks to that an employee has a better paid and more secure job. At the same time the employee participating in the project is engaged in the combination of training activities and social volunteering activities.

The key element to develop similar partnership is a good cooperation with various actors. It should involve the representatives of public labour market institutions and companies in key sectors with high percentage of part time workers. The project will be successful when the parties are strongly devoted to the project’s success and it requires workers who will voluntarily get involved in the project. The aim of the project concerns long-term changes in the labour market and training institutions, therefore its full realization requires several years.

The beneficiaries of the project are following groups:

- Employees at atypical forms of work;
- Vulnerable workers;
- Professionals, who can contribute to outline instruments to a better intervention next to the above mentioned groups of workers;
- Entrepreneurs and Human Resources managers, who can contribute to the construction of mechanisms of Human Resources.

The authors of the project underline the importance of the participation of public institutions and key companies. This condition is inevitable to reach success in the implementation of the concept. The construction of the

model of cooperation constitutes a lesser challenge than its further adoption, which can be reached only under the above mentioned conditions. A helpful factor which was not present in this project, however would be an important added value, is the cooperation with local employment centres.

The beneficiaries of the project include 12 workers and 20 companies. The authors of the project paid particular attention to the gender equality as one of their aims. The project seeks solution to the combination of professional and personal life, to grant flexibility of work. It is aimed at changing the status of work in female life from a burden into an opportunity.

The mainstreaming activities of the project are directed mainly to companies, through individual and collective meetings and workshops. It is also an important step for mobilization of the local business institutions. Other foreseen activity is a roundtable with high level staff at Labour Department for presentation of the model.

The "e-change" project involves transnational cooperation of organizations from France, Italy, Slovak Republic, and Poland. The participation of each of these partners is very diverse. It depends on experience, history, level of development and debate on these issues. The cooperation of such different actors may cause some difficulties, particularly when actors do not know each other. Therefore the international cooperation within the project is indicated by its authors as one of the 'luck factors'; however the European dimension and comparative perspective which enables it, remains very significant.

## Adjust the Balance

### Workshop C: Flexible work management

The “Adjust the balance” DP is managed by Birmingham and Solihull Learning and Skills Council. “Adjust the Balance” is a West Midlands based Development Partnership made up of 30 partners and includes employers from private, public and voluntary sectors, trade unions, universities and Further Education Colleges. The DP aspires to develop a regional Work Life Balance (WLB) strategy as part of a strategy for Corporate Social Responsibility (CSR) highlighting the West Midlands as an attractive region in which it is worth to invest, work and live.

The overall aim of the ‘Adjust the Balance’ DP is the effective implementation of a regional WLB strategy, supporting and developing CSR Academy, which informs and influences national and international policy and practice. It is expected to result in a positive impact on the promotion of inclusive working practices and adaptability of companies in the West Midlands. The DP will work with SMEs, particularly those with no HR function and employers to raise awareness of CSR and the needs of individuals and key priority groups. It will promote flexible working practices and build on current employment legislation to promote best practice and highlight the business care for employees.

The project starts with the research into the WLB strategies and practices that are currently in place and need to be offered to marginalised groups of employees. This examination is carried simultaneously with the diagnose of the requirements of a diverse workforce especially those with low wage and those with disabilities and/or learning difficulties. The research will develop a training programme and materials for company directors of SME companies that combine the need for productivity and efficiency with personal needs of employees. The broad introductory study will enhance investigation of following issues: the possibilities to achieve WLB for the disabled workers; issues of WLB connected to the workers with low income; exploration whether supporting (coaching) female staff in key positions through transition to maternity life and return, improves WLB and retention; changing roles for males and its effect on WLB. The project foresees research activity with 16-18 age group to examine their future expectations on WLB. The WLB will be tested in the voluntary sector in order to improve and recognise WLB issues and to develop the current Quality Assurance IT training package (PQASSO) to incorporate WLB. Another undertaking will include a creation of a programme whereby women/men with time constraints, usually due to caring responsibilities, can learn about and become self employed. Another programme will concern work life mentoring. It will include personal development action plans, work-life balance mentoring in the workplace, designed to empower employees to take advantage of opportunities in the workplace. Finally, the DP will undertake actions aiming at developing work-life balance practices within SMEs in the West Midlands in particular working with SMEs with no dedicated HR support.

The expected outputs of the project are the following:

- Development of Regional network of WLB task groups supported by the local Early Years Development and Childcare Partnerships;
- Development of empowerment programmes aimed at groups of vulnerable employees;
- Development of toolkits to support the implementation of WLB in SMEs;
- Development and rollout of stress management training programme;
- Piloting of Healthy Living Module. Enhancement of existing PQASSO standard to incorporate WLB;
- Research reports covering: low paid, older workers, gender, ethnicity, race and disabilities, expectations of younger workers, changing roles of males in society and the effects on WLB, impact of adopting healthy living styles;
- 30 women moving into self employment as part of the Balancing Business programme.

The beneficiaries of the project are both employed and unemployed. The beneficiaries are involved in the work with the authors of the project to create entrepreneurship. This cooperation aims to help employers and beneficiaries develop a greater understanding of Work Life Balance and to promote the business benefits associated with adopting good Work Life Balance practices.

2.4. →

## 2.4. Workshop D: Restructuring

## Adaptation and Social Management of Change in Cantabria

### Workshop D: Restructuring

The “Adaptation and Social Management of Change in Cantabria” DP (“Gesscant”) is managed by ORECLA, Organism for the Extrajudicial Resolution of the Working Conflicts in Cantabria. The project is realized in cooperation with other national partners: regional government body, associations and enterprises. The “Gesscant’s” general objective is to promote the design and creation of future alternatives that allow anticipation and solution to the social, political and economical problems that are inherent in the management of the change in Cantabria.

Cantabria has been affected by the relocation of industrial and service sector companies, which has a serious negative impact on employment, on local development and territorial competitiveness. Therefore it is necessary to achieve more anticipative and socially more efficient management of industrial changes and above all to elaborate alternatives that involve the small companies. A significant number of Cantabrian companies have been affected by the relocation in the last years. The largest number has been registered in the metallurgic and textile sectors.

The project is expected to strengthen the social and entrepreneurial organisation through the anticipatory treatment of the entrepreneurial restructuring. The strengthening is to be reached through transfer of experiences and training of legal representatives, workers, trade unions’ leaders, representatives of companies and representatives of local and regional bodies. The project is complementary to the activities developed by the most representative trade union and entrepreneurial organisations in Cantabria. It also intervenes in the restructuring processes of certain companies and in its capacity of representation and affiliation, by offering several solutions (in the fields of organisation, resources, training, relocation, employability etc.).

The aim of the DP will be reached through following actions:

- Study of the treatment of the restructuring processes in Europe;
- Analysis of practices from the most relevant restructuring cases in Spain;
- Study on the social and gender impact of the restructuring process in Cantabria;
- Seminars – Sessions to members from the “Gesscant” partner organisations;
- Session “Corporate Restructuring Processes in the EU: anticipation and management of the change”;
- Sessions about restructuring processes;
- Model design of Sectoral Development Observatory – Regional, national and international information regarding the 4 “Gesscant” sectors about the new market trends, drives of change, present condition and their evolution.

The “Gesscant” DP project will effect in following publications and products which were elaborated jointly by all Cantabrian social agents, who take part in the project:

- “Guide to Social Management of change in Cantabria: anticipatory measures to the entrepreneurial closures and restructuring”;
- Cantarey- Reinosa case: the experience of a Cantabrian company;
- Danone and Moulinex cases: their process of restructuring.

The implementation of the project can be disturbed. One of the obstacles noted by the participants of the project was the lack of efficacy of the Sectorial Regional Observatories in a Self-Governing Region. The difficulties in the periodic cooperation of the companies can constitute a significant obstacle. Another threat can be caused by the lack of precise awareness of different implications of restructuring processes for women and men. A negative

factor was the ignorance of the social organisations concerning serious effects of the restructuring processes in the region.

The project's beneficiaries are companies in Cantabria (and their working personnel) that are under a greater threat from restructuring phenomena or industrial crisis in the following sectors: textile, metallurgic, automotive (auxiliary services) industries and retail trade.



## InoCoP

### Workshop D: Restructuring

The InoCoP Development Partnership is a Portuguese project focusing on the automotive suppliers' companies. It is managed by GLOBAL CHANGE Consultores Internacionais Associados. Other actors participating in the EQUAL partnership are public and private institutions of regional, national and international range. The aim of the InoCoP project is to develop cooperation by common tools and methods, products and processes within the automotive cluster. The InoCoP DP is an answer to the need of restructuring of the automotive sector.

In Portugal, as in other European countries, the automotive industry faces the threat of delocalisation of its main assembly lines and the consequent delocalisation of 1st and 2nd tier suppliers for just-in-time supplying. The problem identified by InoCoP lies in the low levels of productivity of the supplying companies in Portugal in comparison to other European companies. One of the main barriers recognized by the DP is the poor technological innovation, associated to the development of R&D projects.

The identification of the problem was facilitated by the prospective studies and sectoral reports. Further analysis supported by different sectoral partners (training centers, employer's representatives and R&D organisations) allowed a deeper understanding of the problems of this industry.

The solution to the mentioned problems proposed by InoCoP is that cluster supplying companies have to develop abilities in the area of product development, along with some capacity of business process development. The creation of a common culture within the automotive cluster means the combination of its two main components of different character: the cluster of the electric components and cluster of the moulds and plastics. The cooperation needs to be developed between the companies as well as training and research institutions. The cooperation should be directed to implementation of common R&D projects aiming to reach greater vocation for the development and engineering of most advanced products, introduction of technical improvements.

The InoCoP DP aims to establish and facilitate intersectorial enterprise cooperation, which would support the automotive components companies' competitiveness. The cooperation is carried out also on the transnational level (with Germany, Italy and Poland). Among the tasks realized in the framework of the project InoCoP mentions:

- The development of the cooperation is to be a starting point for adopting and developing a methodology for the creation of intersectorial communities of practice in complementary and non-competitive domains of knowledge;
- Fostering the joint development of R&D projects;
- Developing a method and instruments that allow the incorporation of knowledge generated in the Communities of Practice into the participating companies;
- Developing and implementing an "open source" collaborative platform and a knowledge repository in order to allow support the maintenance of Communities of Practice overtime.

These actions enable strengthening the cooperation culture between companies of the automotive cluster. They develop common products and process and draw a performance improvement model. As the main purpose of the project is the development of cooperation, the main focus will be in the interaction of the transsectorial Communities of Practice participants and the R&D teams of the participating companies.

The outcome of the project includes material products, which are a useful utensil for the future implementations of its concept. The material products of the InoCoP project are:

- A best practice report on the implementation of sectoral communities of practice in the automotive cluster (in non-competitive domains of knowledge);

- A methodology and tools for the creation and development of sectoral communities of practice in non-competitive domains of knowledge;
- An “open source” software package (including: a practice report on the use of the collaborative software for communities of practice in SME’s; the electronic platform; a knowledge repository on the automotive sector; a manual for the installation of the “open source” electronic platform).

The implementation of the InoCoP products requires consideration of following issues:

- Identification of a similar problem;
- Establishment of a development partnership representing the most relevant actors in the sector/region (R&D organizations, SME representatives, sectoral training centers);
- The identification of the support team (technical staff, technology experts);
- For the implementation of a result obtained by InoCoP, at least one year of Community of Practice Support should be considered.

The beneficiaries of the InoCoP project are the automotive supplier companies’ owners; directors and staff from automotive supplier companies; specialized staff from automotive supplier companies; automotive cluster trainers and consultants; technical staff and trainers/consultants from employers’ organisations, training centres, etc. However, results may be directed to different groups dealing with similar problems.

The difficult relations between different parties involved in the project might be a reason for delays, therefore, one should analyse their relations and its impact in the project. Other obstacles are caused by the low capability of companies to find available resources to participate in the project.

The estimation of empowerment of the project requires a closer look at the target group. For the InoCoP project, the beneficiaries’ group involves 60 persons from SMEs and other organisations. The contacts are made through the sectoral technological centres and SME representatives.

The innovativeness of the InoCoP project relies in the overall approach to the identified problem through the use of communities of practice for product and business process innovation in an intersectoral context. The authors of the project notice, that the proposed solution is cheaper than other approaches to SME innovation and product development.

Transnational cooperation is done with organizations from Germany, Italy and Poland. Transnational partners are dealing with similar problems in their own countries. The sharing events planned are very important to improve national results and develop new solutions.

## Management of Change in the Shipbuilding sector through the Development of the Workforce

### Workshop D: Restructuring

The “Management of Change in the Shipbuilding sector through the Development of the Workforce” DP is managed by Syros Shipbuilding & Industrial Enterprises S.A. It works in cooperation with trade unions, academic institutions, vocational training institutions and other public and private institutions. The general objective of the DP is to reinforce adaptability of the Greek shipbuilding industry. It also aims to develop interventions and solutions to manage and implement changes in a number of parameters of shipbuilding companies, mostly related to human capital.

The results of the project are to be achieved by improvement of companies’ industrial culture through seeking means of changing inhibitory parameters, upgrading workers’ knowledge, competences and skills, improvement of companies internal communication mechanisms and management. The shipyard’s workforce should be supported by promoting mobility, participation and intervention of social partners. Management of formal knowledge and recording tacit knowledge should be done in a transferable way.

The introductory phase of the project is focused on planning and applying an integrated methodology to diagnose problems and improve business culture and communication. The planning and diagnose include defining learning needs to support change, developing learning modules and learning/empowerment workshops. One of the objectives of the project is a reform of companies’ organizational structure, therefore an alternative organizational structure has to be developed, piloted and assessed. Defining knowledge needs will refer to formal as well as tacit knowledge and requires the identification of available or required knowledge resources. The knowledge management will be realized through the development of sophisticated technologies (video, audio, multimedia, etc), collecting, recording, processing knowledge and transferring it through a number of awareness workshops. Among the project’s actions there is a development and operation of a model of Adaptation Support Centre for the shipbuilding industry workforce. The centre will provide: counselling, vocational guidance and entrepreneurship services. The concept of the creation of the Centre emerged from the consultations with the social partners.

The results of the project include following products:

- A diagnostic study of workforce’s needs and definition of industrial culture features in shipbuilding;
- 15 empowerment workshops in the two shipyards involved;
- Communication manual to support culture adaptation and communication structure within the shipyard;
- Learning needs analysis in each shipyard to support change;
- Awareness briefings / workshops attended by employees of all ranks of the companies;
- 4 learning tools on “horizontal” learning topics and 10 learning and empowerment seminars;
- Mapping of companies’ organisational and operational system and development of alternative organizational and work models;
- Model and application plan for business management performance;
- Piloting and assessing business performance plan in the 2 shipyards;
- Identification of knowledge needs and knowledge resources in the shipyards;
- Developing a knowledge management system that will host a e-library of shipbuilding formal and tacit knowledge in the two shipyards;
- 6 familiarization and guidance workshops to make use of the knowledge e-libraries;
- Adaptation support centre for the shipbuilding workforce.

The DP closely cooperates with the Irish DP EQUAL Ireland Lifelong Learning and the cooperation is not limited to simple experience exchange but includes innovative know-how exchange (transfer of good practice on organizational culture and staff exchange to support workforce), joint development of learning tools and methodologies, as well as promoting and disseminating transnational partners' good practices (dissemination activities and mainstreaming of transnational cooperation results).

The beneficiaries of the "Management of Change in the Shipbuilding sector through the Development of the Workforce" DP are: shipbuilding staff, unemployed, employers, subcontractors, social partners, local authorities and organisations, etc.

## Décrire la Convertibilité

### Workshop D: Restructuring

The “Décrire la Convertibilité” (Describing reconvertibility) DP is managed by Le FOREM. The national partners of the project are trade union organisations, vocational training centre in the textile sector and a research centre of the Free University of Brussels. The general aim of the project is the exchange of good practices to support to re-conversions process in the companies undergoing deep restructuring and employment reduction.

The collective redundancies following the companies’ closure or reorganisation bring workers to situations difficult to cope with. Le FOREM and its partners created a reconversion support plan to respond to the needs of workers who are victims of such processes. The project’s main objective is the “reconvertibility” of individuals through the setting-up of reconversion units to promote the reclassification or reconversion of workers endangered with the collective dismissal. The units are the result of cooperation between Le FOREM (Walloon PES), the trade unions and sector organisations and sometimes external actors such as a company representative or any other individual likely to support the reconversion of the employees.

A quantitative research is used to determine special needs or obstacles among the population of workers in order to target and tackle issues for specific groups such as: older workers, women, underqualified workers. Additionally a monthly individual follow-up is another tool used to check the progress made by each worker throughout his/her integration process.

All the activities and services organised in a re-conversion unit focus on three main areas: a tailor made guidance, job coaching and collective activities.

The main expected result is connected with the compilation of practices entitled “Reconversion units – Guide of practices”. It includes:

- A CD-ROM presenting an overall view of the reconversion units methodology – A Video CD offering the viewers a scope of the organisation of reconversion units as well as several testimonies altogether from workers and advisers;
- A copy of the Decree 29 January 2004 of the Walloon Government;
- Specifications related to the Decree;
- Spec sheets: details of the methodology used to setting up and operating a re-conversion unit;
- A set of brochures presenting the reconversion units – available in French, English and Dutch.

The creation of a unit requires first of all the involvement of representatives of the task force concerned by the closure or reorganisation of its company. Meetings must take place and decision must be taken before presenting the demand for the setting-up of a reconversion unit.

Setting up a new reconversion unit requires a range of material resources such as a well situated location, technical infrastructure ( PCs, phone lines, access to the Internet etc.) and an investment in material (i.e. office furniture). In terms of human resources, operating and assessing a reconversion unit requires the involvement of a support committee consisting of the government representatives, trade unions, sector organisations and the representatives of project managing institution. It can include also representatives of the companies, which are likely to support the reconversion of workers. The time necessary to implement the project is difficult to estimate, the duration of a unit is generally of months. Each unit received subsidies from the Walloon Region, support from the ESF and some financial contribution from the sector and the company. The scale of the project is large. The EQUAL funds were used only for the materials describing the reconversion units methodology.

There are two kinds of ultimate beneficiaries of “Décrire la Convertibilité” project: workers laid-off by their companies closure or reorganisation and team of advisers working within the reconversion units framework.

The results (product) may be used for other target groups.

An advice to potential user would be to read, analyse and discuss the project carefully and try to foresee possibilities of implementing the project and feasibility, according to their own environment (geographical, cultural, educational, social, economical, political). The project is easier to carry out in cooperation, therefore establishing a partnership is an important factor for its effectiveness. The project needs consideration of possible environment assets and limits.

As mentioned above, the beneficiaries include workers victims of collective redundancies and advisers from the reconversion units. Contacts with the beneficiaries are spontaneous. One of the assumptions of the reconversion units is its easily accessible location in order to welcome the workers at any moment of the day. Contacts are made also through phone calls, e-mails. There are individual appointments as well as collective activities.

Women as the beneficiaries of the project constitute a smaller group than men, however the issues related to women victims of collective redundancies have been identified and analysed in order to tackle them. Gender equality is taken into account at each step of the individual and professional project. The activities are geared at insuring the respect of the equal opportunities within the training and integration processes. For instance, insuring women access to training sessions and jobs commonly known as "men's jobs".

In terms of mainstreaming the "Décrire la Convertibilité" DP project supports the implementation of the Decree dated on the 29th of January 2004 issued by the Government of the Walloon Region throughout the DP's methods, practices and products. The practices and products from the "Décrire la Convertibilité" project are used among trade unions. These practices and products have been widely spread within the textile sector badly hit by restructuring processes. The project has already been broadcast on European meetings level and the articles on the subject have been published within "Le Forem" internal information network as well as among trade union organisations and within the Textile sector.

The innovative methods and tools were possible to be employed in the project thanks to EQUAL initiative. They have been used on a daily basis in each reconversion unit throughout the Walloon Region. They have been designed to be broadcast and transferred to other regions.

The transnational partners of the "Décrire la Convertibilité" DP project are from France and Italy. It effects in exchange of the practices and the creation of working parties aimed at specific targets such as E-learning, reconversion and management of human resources.

	DP'S NAME	COUNTRY	DIAGNOSED PROBLEMS	AIM AND BENEFICIARIES	ACTIVITIES	RESULTS
Age management	Dynamism and experience	PL	Negation of old practices by young employees, impossibilities of finding agreement concerning technological matters as well as irritation and disregard being the consequence of the difficult adaptation of new technologies by employees 50+.	Aim: support of employees' adaptive abilities, especially facilitating intergenerational cooperation of employees, development of skills (mainly IT) of workers aged 50+.	The elaboration of new innovative method of the maintenance of workplaces in organizations, workshops in the field of: IT technologies, management of changes, psychological workshops; monitoring and evaluation of the project's results developing complete documentation and materials describing the method.	A model of the process of introducing changes in the organization in: improving IT skills of employees above 50 years old, improving intergeneration relations in companies, preparing organization staff to implementing indispensable changes to effective transfer of IT knowledge and lifetime' experience of employees at the age of -35 and 50+.
	Skills Analysis	UK	Low recruitment and retention of older workers in the SMEs; lack of awareness of the business benefits of being age positive.	Aim: to influence SMEs in the recruitment and retention of older workers. Beneficiaries: 400 workers (aged 50+) employed by SME.	Information workshops and seminars; identifying hidden competences – to avoid redundancy and retirement of older workers; providing access to a self evaluation tool to analyse business position in relation to age.	Competence Toolkit; e-Learning delivery methods; new qualifications.
	Experience	GR	Low employment rates for the 55 to 64 age group, long term unemployment increasing with age.	Aim: to reinforce the qualifications and skills of persons of an older age (55+) in order to sustain their occupational / professional activity. Beneficiaries: working persons of 55+.	Studies on the current situation in the field of managing the age structure of the workforce; development of a methodology for managing active ageing in enterprises; development and application of supportive mechanisms an appropriate consultation system, an effective vocational training system; development of social dialogue procedures and suggestions for institutional interventions.	Tools and methodology regarding age management in the economy; Observatory for a systematic review of the issue of active ageing and its various parameters.
	B.Sapiens	PT	Discrimination of older workers in micro, small and medium-sized enterprises.	Aim: to find solutions for tackling discrimination of older workers. Beneficiaries: enterprises – SMES -and organizations, older workers, excluded of company's growth process and talent management, managers that might assume a coaching position, low qualified employees in the risk of unemployment.	Development of job training actions (coaching); enhancing older workers' knowledge in the SME (as coaches); creating knowledge management model for SMEs, linked with assessment of job train; creating SMEs national networks and professional networks.	New on job training model for SMES, supported on internal HR; professional profile for on job training coaches; B-learning training course for older coaches; handbook for older coaches; knowledge management for SMEs – model and freeware toolkit; e-portfolio toolkit.
IT Skills	MITE	IRL	Large number of small to medium sized employers experiencing difficulties in adapting to changes, particular employees groups (immigrants, lone parents, disabled people) experiencing problems on the labour market, insufficient exchange of information on the vacancies and jobs seekers.	Beneficiaries: state agencies, representative bodies, community groups, employers, employees and job seekers (lone parents, people with a disability and foreign nationals).	Identification of issues and needs arising; developing 4 link groups – partnerships', employers', employees' and job seekers' link group (the groups will be composed of representatives from the different beneficiaries); designing and running a range of training and development interventions to address the issues and needs arising for the different link groups.	Local model of partnership between various groups in addressing the labour market adaptability; new training and development policies for employers; 'tracking' employees over the course of the project to verify the effects of trainings; work with job seekers; reports and practical methods and tools that SMEs can use to improve their HR practices.
	Magusine	BE	Low ability to use internet in pedagogy, the lack of guidelines for teachers, educators how to use web tools in education process.	Aim: a contribution to new pedagogies using web tools, full autonomy for partners of the project in using web tools with their public, creation of a network of publications on the web. Beneficiaries: adults and young adults (unemployed, socially discriminated; foreign origin, females).	Training for teachers, educators, trainers (technical and editorial matters); feedback on beneficiaries activities (editorial activities for their empowerment); technical developments (upgrading Magusine Web tools).	Fifteen autonomous publications on the net; Video documentary (DVD 40') on experiments of the DP; new abilities for beneficiaries, new expertise for teachers, educators, trainers (educational work with Web tools); Internet work in network (know how, projects sharing, etc.)
	Mikrogunea	ES	Low level of employment in the SMEs; low level of penetration of the Information Society technologies; lack of perception of the value of the application of ICTs among the smallest companies; the low level of ICT equipment and use in the smallest companies; a lack of cooperative spirit among the micro-companies.	Aim: to increase the competitive position of the microcompanies and self employed workers through actions directed to take care of the specific needs of those groups. Beneficiaries: 10 000 of microcompanies (size 1-9 employees)	Prospecting 1.000 microenterprises; developing management system; supporting the entrepreneurial cooperation and associationism; elaborating an instrument to detect, control and eliminate failures in the management.	Data base for prospecting the needs of microenterprises; inform model; questionnaire model; management documentary system; reference books to control and eliminate failures in the management; other tools to improve SMEs' management; experiences of job rotation; a web site; corporative identity manual.
	Entrepreneurship in the Web	PL	Vulnerability of micro enterprises due to overall economic situation in the country and the low level of application of IT .	Aim: the growth of competitiveness of micro enterprises through applying information technologies to increase the quality and widespread accessibility of supportive services, professional counseling, information and training. Beneficiaries: 400 microenterprises, the owners and the employees, persons of different age.	Design and development a vortal for micro-entrepreneurs; development of new e-learning packages for self-learning; providing counselling in human resources, management and development of the enterprise via Internet; organizing study visits the for experience exchange with the entrepreneurs from EU countries.	Model of knowledge and services transfer, its elements: the library of the professional training module programmes, the library of publications, web pages, examples of good practice, e-learning counselling; integration and training seminars; IT Tools: "Internet Guide for the Entrepreneur"; a vortal for micro enterprises "Internet Guide for the Entrepreneur".

	DP'S NAME	COUNTRY	DIAGNOSED PROBLEMS	AIM AND BENEFICIARIES	ACTIVITIES	RESULTS
Flexible work management	E-Micro	ES	For the micro enterprises: low level of productivity; frequent absence of ICT; lack of management knowledge; balance difficulties between personal and professional life.	Aim: to improve adaptability of microfirms and their workers. Beneficiaries: owners and employees of microenterprises who belong to one of the groups: women, immigrants, low educational level and handicapped people.	Study and research, promotional activities, training activities aimed at skills improvement; new management methods: local ICT resources centre, consulting service for business needs; encouragement of co-operation; creating new organisation methods: research, support service and incentives for microfirms.	Improvement of internal company relations; improvement of competitiveness; incorporation of social responsibility; methodology for support in time management; good practices guide.
	efez.pl	PL	Lack of complex informational services that could meet the needs of users searching for information, tools and complete solutions regarding flexible forms of employment.	Aim: promotion of flexible methods of employment. Beneficiaries: Small and Medium Enterprises. Additional beneficiaries are: employees of SMEs and the institutions that support such businesses (local authorities, public offices, the education sector, NGOs).	Creation of a Flexible Work Vortal (efez.pl); development of tools supporting implementation of flexible employment; introduction of promoted employment methods in selected companies; preparation of new legal acts regarding telework and flexible work; promotion of the Vortal and project results conferences.	First Polish Vortal of Flexible Forms of Employment – efez.pl – being a comprehensive on-line guide for implementation of flexible working; National Trainer database; handbook/manual of Flexible Forms of Employment; conferences and workshops; proposals for legal acts on teleworking
	E-Change	PT	Increasing insecurity of employment and contractual forms, the significant turnover in certain activity sectors and the necessity of finding new models of organization adapted to enterprises needs that do not exclude employees' stability and protection.	Aim: response to recurring social problems concerning employment by offering new activity models. Beneficiaries: Employees at atypical forms of work; persons with vulnerable and insecure work situations; mediation and insertion professionals; entrepreneurs and Human Resources managers; governmental structures.	Experimentation model of Employers Grouping – complementary activities between workers; creation of training projects articulated with the atypical activities of employment.	Narrative of the conciliation practices between working times and transition managing; guide to the constitution of the Employer's Grouping; guide of attendance to alternation professional cycles.
	Adjust the Balance	UK	Low adaptability in the workplace; need for improving corporate social responsibility.	Aim: to develop a regional Work Life Balance (WLB) strategy as part of a strategy for Corporate Social Responsibility highlighting the West Midlands as an attractive region in which to invest, work and live. Beneficiaries: employers, workers and the unemployed.	Research reports involving SMEs and vulnerable workers; building and promoting a programme of activity to 100 employers using support tools and 3 good practice models across the region; establishing a regional network of WLB Task groups; development and launching 1 foundation degree; designing and developing empowerment processes and support tools to support employees to improve their WLB.	Development of Regional network of WLB task groups; development of toolkits to support the implementation of WLB in SMEs, development and rollout of stress management training programme; enhancement of existing PQASSO standard to incorporate WLB.
Restructuring	GESSCANT	ES	The necessity to anticipate industrial changes; to elaborate alternatives for small companies.	Aim: to promote the creation of future alternatives that allow anticipation and solution to the complex problems that are inherent in the management of the change in Cantabria. Beneficiaries: companies in Cantabria (and their working personnel) that are under a greater threat from restructuring.	Studies and research; trainings; pilot experimentations.	Publications concerning measures and recommendations for anticipatory treatment of the entrepreneurial restructuring. Strengthening the social and entrepreneurial organizations through the transfer of experiences.
	InoCoP	PT	The automotive industry faces the threat of delocalisation, low levels of productivity of the supplying companies.	Aim: to develop cooperation within the companies supplying components in the automotive cluster. Beneficiaries: automotive supplier company owners; directors and staff from automotive supplier companies; specialized staff from automotive supplier companies; automotive cluster trainers and consultants, etc.	Developing methods and tools to support the creation and development of sectoral Communities of Practice in the automotive cluster, creation of "Open Source" software package, Development of a best practice report (edition and production) and final edition of learning tools.	Greater competitiveness of the automotive components companies, better intersectorial enterprise cooperation; methodology for the creation and practical implementation of intersectorial communities of practice in complementary and non-competitive domains of knowledge.
	Ploigos	GR	Competitive pressure on the shipbuilding industry, threat of restructuring, insufficient cooperation within the sector.	Aim: reinforcing adaptability of the Greek shipbuilding industry. Beneficiaries: disadvantaged, high-risk workers in the shipbuilding and ship-repair sector, unemployed, spin-off workers, employers, subcontractors, social partners, local authorities and other actors.	Creation of integrated methodology to diagnose problems and improve business culture and communication; defining learning needs, developing learning modules and workshops; modelling of enterprises' organizational structure; developing and operating a model of Adaptation Support Centre for the shipbuilding industry workforce; transnational cooperation.	Definition of industrial culture features in shipbuilding; empowerment workshops; communication manual; learning needs analysis; awareness briefings/workshops for employees; learning tools on "horizontal" learning topics and learning and empowerment seminars; mapping of companies' organisational system; development of alternative organizational and work models.
	Decrire la convertibilite	BE	Collective redundancy after: a bankruptcy, company closure or an internal reorganization.	Aim: Exchange of good practices between approaches for the support to re-conversions at a European level aimed at the setting-up of integrated resource centres. Beneficiaries: one-hand workers laid-off by their companies closure or reorganisation and advisers working within the re-conversion units framework.	Incite trade union organisations to set up re-conversion units - stimulate ex-employees to use the services of the re-conversion units; study of the public projects and professional courses enhancing specificity of gender and status; get to know and enhance specificity of workers reaching the end of their career.	Results on the national level: a second guide aimed at specific groups of employees, training sessions for advisers working within the re-conversion units framework; brochures on competencies aimed at the entire public. International level: developing the implication of re-conversions units and partners within the project.

### 3. What works in the EQUAL partnerships

The main aim of the Adaptability Peer Review was not only to give an overview of successful EQUAL projects but also to formulate universal conclusions on the preconditions of successful EQUAL partnership. Workshops devoted to the reviews of participating DPs and discussions on their results were the most important part of the Adaptability Peer Review. Together with the description of DPs, based on information provided in the form of questionnaires and presentations, which is presented in the previous section, workshops results enable us to formulate conclusions on the preconditions of conducting effective and innovative EQUAL project.

#### 3.1. What makes a solution effective?

The most important – and at the same time the most difficult – question of the Adaptability Peer Review was what makes a solution effective? Of course, basing on the experiences presented at the meeting it is impossible to create a closed list of effective solutions to adaptability challenges. The reason is not only the number of partnerships (16 DPs could not cover all of the adaptability issues), but also the diversity of European economic and legal environment.

Basing on the results of the conference it is possible to answer the question what works with an open list of solutions or project activities, which worked among the reviewed partnerships. It is also possible to present them in the broader context of the four main thematic fields of the conference. Activities corresponding with the problem and innovative approach that can solve the specific problem are preconditions of a successful DP. As the designing the activities of the partnerships requires good understanding of the problem, the proper diagnose is essential precondition of the success.

The solutions, aims and results depend on the field of activity. Therefore we have divided this section into the subsections devoted to the thematic groups, identical with the thematic groups during the workshops.

##### 3.1.1. Age management

The DPs dealing with the age management concentrated on enhancing employability of older workers, as well as on influencing employers to make them age positive and enhance their knowledge of the issue. These aims of the DPs are in general similar, although they differ in regard to the approach to specific issues like the range of the target groups, sector of the economy or number and size of companies involved. With these goals DPs did not need any specific research programs to identify the problem; research tools were generally used in the preliminary stage to help preparing efficient activities.

All DPs have chosen to use consulting and training, although scope of specific actions varied significantly between the partnerships. Altogether, the following actions aimed directly at the age management were proposed by the four DPs:

- **development of complex model** (method) of age management within the company;
- **development of training models** (methods) to both increase competences of older workers, as well to identify their hidden competences and increase HR divisions ability to deal with the age management;
- **workshops and trainings** both to increase competences of older workers as well as to increase the awareness of all employees (including managers);
- **improvement of training availability and quality** for the ageing workers, especially those with lower skills level, including specific programmes for ageing coaches.

The common goal of all partnerships is to **create a model system** (a method) of **age management**, although the stress was sometimes put on a little bit different aspects. All of DPs included elements of training and development of training methods (and in some cases training capability). The main aim here is to deliver methodology and tools to be used by the stakeholders after the end of the project – but also training activities are undertaken by all the Partnerships. Not surprisingly, significant part of the partnerships activities consist of

building IT skills of older employees or vocational training for workers with lower education attainment, which corresponds with the problem of skills depreciation.

All the partnerships recognize **skills depreciation** (related to the fast changing work environment) as one of the main problems of age management. This view was shared by the participants of the conference and is well proved in the literature of the subject. Dealing with the ageing workers' problems through training is an obvious solution. Therefore the innovative element of the partnerships is not the training itself, but developing new ways of delivering it more effectively and finding universal methods (models) of delivering it on the company level. Also the methods of identifying hidden competences were prized as interesting and innovative by the participants of the workshops.

Second element which was common for all the partnerships is the **involvement of employers**. With the employer actively engaged in the age management process the results of the training are better and the suitable approach to the problem of ageing of all the stakeholders is more probable. The importance of employer in the process of age management is evident and all of the partnerships recognized that, however the scope of involvement of employers in the projects varied between the projects. Also the discrimination of the older workers by employers was not equally important for all the partnerships – some of them chose rather to concentrate on the problems that stand behind the discrimination (i.e. adaptability of older workers and their skills), other tried to modify the stereotypes and influence the employers themselves.

Of course the aims of DPs can be achieved only with the number of **supporting activities**. Very interesting concept was provided by the DP *Dynamism and change*. It concentrated its actions not only on the employees aged 50 and more, but also on the young employees and managers. The aim was to increase skills of older workers, but also to facilitate cooperation and skills transfer between young and old generation of employees within the company. To achieve that, also active participation of managing staff is required. Other interesting activities conducted parallel to the main methodological work consist of influencing employers approach, specific measures for the SME or enhancement of training opportunities for older workers. Important part of some of the partnerships included revision of legal framework to identify possible changes to facilitate age management within the company as well as functioning of the labour market as a whole.

Participants of the workshops were convinced that **partnerships chose proper way of diagnosing and solving the problem**. At the same time some very important comments were submitted, concerning the use of complimentary measures to achieve DPs' goals. Not all of the partnerships use the social dialogue to better understand the problem and develop the activities of the partnerships. Many participants believed that only involvement of social partners could bring sustainable results in the field of age management. Others noticed that the problem of age management is similar in all European countries (and only its intensity varies with the different demographical situation) and so that is why the trans-national cooperation should be a very important part of all the DPs'. As the projects in the field of age management are quite similar – much more similar than other reviewed partnerships in other fields – it is a very relevant comment. It seems that in regard of age management regional economic, cultural and legal environment is very important factor decisive for the way the solutions are implemented – but the solutions themselves are similar in all of the countries and depend exclusively on the technological change and demographic situation.

### 3.1.2. IT Skills

Developing and promoting IT skills is in fact a tool to solve other problems and is often strictly related to the issues of ageing or restructuring. Although DPs activities, beneficiaries and results varies significantly within this group, the common feature is the key role of innovative, often web-based IT tools, specifically designed to deal with different problems. The aim of these tools is to enhance competitiveness, adaptability of the companies and flexibility of beneficiaries – both employees and employers. In one case specific solutions were developed to improve exchange of information between employers and job seekers and thus reduce the search costs.

As the main aims of the DPs altogether, the following can be identified:

- **creating a knowledge management system** for beneficiaries (SME, enterprises within specific sector or organisations of employers),

- **supporting cooperation** between companies to increase their competitiveness,
- **developing tools** to improve management and detect and eliminate potential management failures,
- **training of the staff** to improve management and IT skills,
- **supporting IT services for the micro-enterprises** (including e-learning and web based consulting),
- **providing skills and tools for trainers** and teachers to help them to work more effectively.

Among the examined partnerships, three (Mikrogunea, MITE and Entrepreneurship in the web) concentrated on IT issues to enhance cooperation of employers and encourage them to associate and exchange information and experiences. The tools to accomplish this goal were IT knowledge management systems, improvement of awareness and skills of managers (both in regard of IT skills as well as the importance of cooperation). These activities were concentrated rather on SMEs. Two partnerships, although concentrated more on employers, provided also employees with tools and training and aimed at improving labour market functioning, e.g. by introducing new job rotations formulas or improving exchange of information on vacancies. In general the main goal of the partnerships was to promote IT skills and use of IT tools among SMEs and their employees and enhancing their cooperation. One partnership (MITE) included in the project also a number of issues concerning directly age management, flexible work or restructuring – mainly in the form of increasing awareness of the employers. These projects were highly priced during the workshop and they could be described as mainstream projects for IT skills development.

Different activities and goals were presented by Magusine DP. In this case the main aim was not to influence the employers or the employees and improve IT skills use in the companies, but rather to provide partners with a powerful tool (and skills) enabling them to publish their materials on the web and facilitating cooperation between different institutions. In this way the capability of the participating institutions to provide training and education services is increased, which is the main aim of the project. The result is so called “network of publications” and – as the most important part according to the DP itself – the community of partners taking part in the project. Although as noted during the workshops, the project is not innovative in regard to the technology itself, the way it is used is very innovative and interesting.

As stressed before, the **IT skills** are not a solution themselves, but they **are used as a tool to solve problems** identified by the partnership. Examples presented during the workshops proved, that the variety of specific solutions is almost unlimited and depends only on the diagnose of the problem and ideas of the DP. During the workshops participants agreed, that **using experiences of presenting DPs’ in other regions and countries is relatively easy**. It seems that as the IT solutions (or concepts) are generally not limited by the legal framework, experiences in the field of IT are the easiest to implement in the different legal environment. The barrier might be the fact, that IT tools prepared during the projects are usually available in national languages only.

The crucial issue in every EQUAL project is to guarantee **good diagnose of the starting point** and choosing those activities, which would work best. That is especially true in this field, as IT may be the answer for a number of different challenges of adaptability.

### 3.1.3. Flexible work management

The concept of flexible employment is a little bit controversial. On one hand, flexible employment forms mean higher flexibility and adaptability of labour market and are an option for those who are not able to work full time or on permanent basis. On the other, employees often find flexible work insecure and worse than regular contract. It is important to note, that flexible work is not a goal, but – similarly to the IT skills – a tool to deal with the problem of rapidly changing economic environment. Flexible work does not have one definition. It is sometimes defined as situation, when employee has significant control on when, where and how he or she works. In fact flexible employment means also flexible arrangements of working hours, time of the contract etc. by the employer.

As the **flexible work is** not a goal, but just **one of the tools to solve the adaptability problem**, proper diagnose of the situation on the national (regional or local) labour market is crucial – promoting flexible employment with the

only aim of increasing the share of people working in flexible forms is pointless. For example in one country the inflexibility of the labour market may be the result of the very inflexible labour code, in another the lack of flexible forms of employment may be the result of stereotypes or resistance of employers or employees. Applying the same activities in both cases would be inefficient, although the diagnosed problem (underutilisation of flexible forms of employment) may be similar.

These concerns resulted in different approach of reviewed DPs to the problem of flexible work management. Therefore during the workshops a variety of diagnoses, activities and results were presented. It is possible, however, to enumerate main activities taken by the DPs:

- **developing new management and organisation methods** and providing them via consulting activities,
- **developing tools** supporting implementation of flexible work,
- **revising legal framework** and proposing new legal acts,
- **developing experimental working models,**
- **developing and promoting work-life balance** and **corporate social responsibility,**
- **improving skills** of workers by studies, researches, promotion and training activities.

A very interesting concept was presented by e-change DP. Although all the partnerships had, among other actions, aimed at developing and introducing new flexible work models, e-change was the only partnership concentrated almost exclusively on that task. This DP has proposed a model of human resources sharing, aiming at increasing productivity and working conditions of employees working on a part-time basis. The DP has identified that such persons are in many ways underprivileged comparing to the employees on regular contracts. The aim of the project was to test “employers grouping” concept, which makes it possible to provide part-time workers with training and ensure a higher level of security and incomes, thanks to the cooperation of his/her employers, for whom he/she works part time. The workshop participants highly prized this concept and found it very interesting and innovative, although the very small group of beneficiaries makes it very difficult to draw any final conclusions. The experiences of the project are very interesting also thanks to the involvement – as partners – major Portuguese companies, including national telecom operator.

In regard of number of beneficiaries other partnerships are much larger than e-change, but there are significant differences in their goals and methods. e-Micro and Adjust the Balance partnerships were both concentrated on enterprises (microenterprises exclusively in case of e-Micro), employees and unemployed (in case of Adjust the Balance) in the specific region.

Efez.pl partnership, although in many respects similar to the e-Micro and Adjust the Balance, has a horizontal approach and covers with its activities the area of the whole country. It also concentrates more exclusively on development and promotion of flexible work management itself, including revision of the legal framework and proposal of new regulations on teleworking.

Workshops results indicate that the **experiences of the flexible work management are usually not possible to be implemented directly in other countries or regions**. The legal framework is important but not only barrier for the dissemination process. Proper definition of the problem and goals is very important and strongly depends on the local circumstances, which is the second important barrier for the transposition of the experiences in the other countries. At the same time number of experiences – and first of all innovative concepts of work organisation and consulting methods – may be easily used by other partners.

#### 3.1.4. Restructuring

**Restructuring** is perhaps the broadest concept that was discussed during the workshops and at the same time – it **is the core issue of adaptability**. Restructuring process is a way the company adapts to changing economic environment and as such is necessary but sometimes painful for the employees. As restructuring is a very complex problem, varying significantly between countries and regions, DPs participating in the peer review

presented different approaches and proposed variety of activities and results.

In their diagnoses DPs concentrated on different stages of restructuring process, which implied different solution proposed. The overall picture of DPs' actions is as follow:

- **advising, supporting and counselling** employees (endangered by collective redundancy) to enhance their employability or to help them at the end of professional careers,
- **developing methodology** and good practices to support reconversion,
- **extracting methodology and good practices** (in regard of social treatment) of restructuring,
- **promoting social dialogue** as a mechanism of anticipation and management of the restructuring process,
- **promoting and upgrading workers mobility**, participation and skills,
- **increasing companies competitiveness** by promotion of sectoral cooperation, including cooperation in R&D.

Partnerships concentrated on different problems and geographic areas. Two partnerships operate on national level but in one industrial sector (shipbuilding in case of Ploigos and automotive in case of InoCoP), while Décrire la Convertibilité aims at all employees of industry companies in restructuring process in Walloon region, also Gesscant partnership operates in one region (Cantabria) and supports all companies regardless of sector.

The stage of restructuring process that the partnerships chose to take part in also varies significantly. During the workshops particular attention was given to the Décrire la Convertibilité activities. This partnership helps employees endangered by collective dismissals by creating and supporting so-called "reconversion unities" – company based support for employees, which through personalised contact are to help them with finding new employment. Although these activities are very successful – according to the partnership more than 70 percent of beneficiaries finds new employment – participants of the workshops agreed that this kind of support is a "last help resort", applicable when other means have failed and collective dismissals (due to the closure, bankruptcy or deep reorganisation) are inevitable. Still the participants found the idea very interesting and innovative – and probably relatively (to many other partnerships' results) simple to implement elsewhere, basing on DP's experiences.

Two sectoral partnerships (shipbuilding or automotive industry) presented different approach. Their activities concentrated on the companies itself with less resources allocated directly for the help to employees. The rationale behind that is that it is possible to improve the adoption to change process within the sector to make it less painful for the workers by providing companies with specific services, e.g. by improving companies' culture, management, transfer of knowledge and social responsibility. Particularly interesting is the example of InoCoP. This DP supports development of cooperation culture in the form of sectoral Communities of Practice (within automotive industry). These communities are to improve knowledge and competitiveness (also trough joint R&D projects), which of course is crucial for the successful adoption to changes. Participants of the workshops were rather convinced that results of these two DPs are not possible to implement elsewhere without changes (as situation of shipbuilding industry in Greece or automotive suppliers in Portugal does not necessarily corresponds to other countries or sectors).

Workshops proved that although there is a number of possible ways of supporting employers and employees during the restructuring process, the **most successful solutions consist of direct support to the employees or enhancing cooperation of companies**. The specific activities may vary and the solutions developed by the DPs might not be possible to implement directly elsewhere, but the **ideas themselves are similar**. The most important factor distinguishing types of intervention is the stage of restructuring process – the help at the early stage is delivered to the companies (and the aim is to increase the competitiveness without adjustments painful to the employees), while at the late stage (when the company has to reduce employment) it is concentrated on the employees.

## 3.2. What are the preconditions of a successful partnership?

Although innovative approach and activities matching the problem are preconditions of successful partnership, there are many other factors that are crucial for a successful partnership. In many cases they are common for all the thematic fields – therefore we decided to present conclusions of the workshops grouped by the crucial factors and not by thematic fields.

In this section we discuss issues that are not directly connected with the field of intervention and conducted activities, but very important from the organisational point of view. Basing on the workshops results, the following topics were identified in this group: composition of the DP (and its importance for the capacity building), diagnosing the problem, mainstreaming and measuring the results as well as ensuring their sustainability.

### 3.2.1. The Development Partnership's composition

The number and kind of partners was widely recognised as one of the most important preconditions of successful partnership. Such comments appeared during the workshops and discussion on that topic was one of the important points of the closing session. Although it is obvious that only partners devoted to the project are able to form a successful partnership, it is worth to explore the issue of the DP's composition.

All of the participating partnerships **consisted of many partners**, in some cases even more than 20 or 30. Among the partners were variety of different entities – governmental agencies, local authorities and municipal institutions, national, regional and sectoral business associations and trade unions, development agencies, NGOs operating in many different fields, research institutes, universities, companies (including the biggest and most important in the given area or sector). The fact that partnership in general consists of many different partners with knowledge of different aspects of the problem the partnership wants to solve is important factor which enriches the partnership. It gives better understanding of the problems and facilitates the contact with the beneficiaries. The DP composition is crucial also for the issue of empowerment. Without representation of all important parties it is impossible to conduct reliable consultations of planned activities.

Particularly interesting is the **composition of partnerships operating on the local level**. Many partnerships limited themselves to dealing with problems occurring in a specific area – e.g. Dynamism and experience, MITE, e-Micro, Adjust the Balance or Gesscant. All of these partnerships **consist mainly of regionally operating entities**, including local authorities, business associations and NGOs. According to the participants of the conference, such a partnership might be particularly successful thanks to the good understanding of the problem, concentration of efforts and resources on the well defined activities and high devotion of the partners to the project. To some extent concentration of partners and their activities in a relatively small geographical area is favourable because of the easier communication within the partnership and between partnership and beneficiaries – even with the best IT skills face to face meetings are important.

**Involving social partners** into the partnership **and using social dialogue** as one of the tools was recognized as one of the **crucial factors for the success**. At the same time some of the participating DPs complained that trade unions are sometimes not interested in the partnership's results (not to mention the fact of being involved as one of the partners) and therefore the cooperation with social partners is very limited. On the other hand trade unions were successful partners in many projects. It seems that the scope of involvement of social partners depends mostly on the development of the social dialogue and its institutions in the country – and this factor varies considerably within the European Union. One of the DPs insisted that the lack of interest of trade unions is the result of their conservative approach to the adaptability concept. Certainly the involvement of the trade unions is crucial in the projects which deal with issues that could be controversial, e.g. flexible work management.

Some partnerships delivered interesting examples of **involving huge companies** into their partnerships. Good example here is e-change. This DP is relatively small in the number of beneficiaries, but at the same time very innovative. During the discussion as a very strong point of the DP and – according to the DP itself – one of the factors decisive for the success was recognised the involvement of major Portuguese employers. Thanks to that positive results of the partnership are more likely to cover significant number of beneficiaries, even if the EQUAL project itself is not very large. They also could be more reliable for other potential users.

Other interesting examples are provided by **sectoral partnerships**. The projects presented during the workshops aimed at enhancing inter-sectoral cooperation and competitiveness of the involved companies. Therefore including all important players within the sector is crucial, as successful solutions for only part of the sector could even worsen the situation of the parties not involved. Fortunately that is not the case of the presenting DPs, but that problem can arise in case of sectoral intervention.

### 3.2.2. DP's composition and capacity building

An issue that was mentioned several times during the workshops was the importance of the EQUAL projects for the **capacity building of the partners** involved into the project. That is particularly important in the contexts of DP's composition.

During the projects partners often fulfil tasks **related to their normal activities** (conducted regardless of the project). In many cases the experience that organisation – and its employees – gains during the project are as important as material products of the project, although they are usually not enumerated as the results. For example, preparing best practices and methodology of supporting the SMEs with consulting in flexible work management is a material result of the partnership that is enlisted and foreseen by the project. But at the same time local business council that was involved in preparing these materials – and conducted the necessary work – gains invaluable experience in the field of transferring knowledge, learns a lot about local circumstances and problems etc.

Owing to that partners are able to do their work better also after the project, even if they are not directly involved in mainstreaming activities. In some cases capacity building could be strictly related to the **sustainability of the results**. For example partner who learned a lot about the local labour market and took part in preparing new programmes or tools to support beneficiaries (with whom it works regardless of the partnership), will be able to use the partnership's results later in its activities. Of course that is often not possible without additional, external financing (more comments on that point in the subsection 3.2.4. devoted to mainstreaming and sustainability).

### 3.2.3. Diagnosing the problem and measuring the results

Proper **diagnose of the problem** – of the starting point for the partnership – is **crucial prerequisite of effective intervention** and designing appropriate activities. General impression of the workshops participants were that the diagnoses done by the DPs were accurate and enabled good preparation of activities. Research institutes or universities participated in many of the DPs and all DPs included organisations that were directly involved in one or another crucial aspect of the DPs activities – e.g. sectoral associations in case of supporting restructuring of an industry, SMEs' associations in case of projects aiming to help SMEs or regional organisations in regionalised projects. To diagnose the problem DPs used not only their own knowledge, but also studies and reports prepared by researchers and governmental agencies. In many cases the initial stage of the partnership was associated with detailed studies including sectoral and regional analysis, interviews, questionnaires or analysis of experiences and best practices of other countries, regions or sectors.

During the workshops only **little attention was paid to the problem of measuring the results**. One of the reasons was probably the fact, that most of the participating DPs are in the middle of the project and so far they have not finished their evaluation processes (in some cases the development of methods to measure the results is still in an initial stage). At the same time it seemed that partnerships do not pay as much attention to the problem of measuring the results as they should. Also some of the methods proposed seemed to be inappropriate and methodologically incorrect (e.g. surveys of the beneficiaries through the on-line questionnaires for the registered users of the portal).

The problem of measuring the results is essential for innovative EQUAL projects – much more important than for all others ESF projects. Without reliable, quantitative measurement of the results it is hard to draw conclusions on the possible further use of the DP results. Partnership own impressions and statistics on e.g. satisfaction and employability or competitiveness of beneficiaries are very important, but it seems that also more advanced methods should be used, including controlling for deadweight loss and substitution effects. It seems, however, that **DPs do not pay enough attention to this problem**.

### 3.2.4. Mainstreaming and sustainability of the results

**Mainstreaming and sustainability** are the **backbone of an innovative project**. Results of the partnership that managed to work out successful solutions have to be disseminated, promoted and supported in many different ways. Participants presented broad range of possible ways to achieve that goal – from presenting reports and best practices on the project’s website to conferences with the members of national parliament and promoting new legal acts. Except of the problems with recruitment of beneficiaries encountered in the initial stage of the project by some DPs (which are described in subsection 3.3.), **horizontal mainstreaming** seemed to be successfully conducted by the participating partnerships. In fact horizontal mainstreaming is not a hard task if partners have good position in their field of activity and good contacts with other potential users. The others also have problems to solve and are usually interested in learning from the others experiences.

The **vertical mainstreaming** is a different problem and needs different tools than horizontal mainstreaming. The need of vertical mainstreaming depends strongly on the type of the results. It is particularly important if the dissemination process and further implementation of the results requires involvement of governmental institutions or legal acts adjustments. This is not necessarily the case of all DPs, but some of them identified vertical mainstreaming as one of the problems. The main reason is probably the fact that DP has to effectively communicate the results to the large groups, which sometimes might not recognise their value. The other reason is that there is a lot of competing ideas on the higher level of public.

Although mainstreaming of the results is very important, it is unfortunately difficult to draw any final conclusions from the presenting DPs experiences, as in the most of the cases their projects are far from the end and a lot of **mainstreaming activities have not been conducted so far**.

### 3.2.5. Public and private services – how to ensure sustainability

The most important question at the end of every successful project is **how to finance the further activities**, designed on the basis of the DP’s experience. A number of interesting ideas was provided during the workshops. First of all the **importance of capability building** was underlined which was mentioned in subsection 3.2.2. The capacity building is important but it does not ensure sustainability and in some cases it might be irrelevant for the broader use of the DP’s results.

In **some cases the project results may not need further financing** – if thanks to the project cooperation between the companies has been established or set of model flexible working contracts has been designed and promoted, the results might be sustainable even after the end of the project without any further actions. However in most of the cases the activities of the DPs consisted of services provided to the end beneficiaries – and such services require financial input. Even if the result is the training methodology or manual of implementing organisational changes in the company, the effective use of those tools needs further support and development, which also have to be financed. And in the case of ideas that should be implemented on the very broad basis (e.g. reconversion units or easily available age management support for the companies), the cost might be very high.

One of the possible solution is to **mainstream the results** – through the horizontal and vertical mainstreaming – to be broadly used by public, non-governmental or even private institutions and finance them through the general ESF resources or other public sources. The project has to be very successful and results must be very convincing to achieve that, but the participants of the workshops agreed that it is possible. There is even one example that is already financed in this way, which is the “Décrire la convertibilité” DP.

Some participants pointed out that it is possible in many cases to mainstream the results in the way that would enable **further financing from the private sources**. That is the case of the consulting and training services for the employers (including training services for the employees of the company). The successful method could be used by private entities and employers could be ready to pay for such services if they were convinced that they would benefit from that. Therefore a very important part of the results should be the proof (in a form of research or report) that the gains to the productivity and profits of e.g. introducing age management are greater than the cost of implementing it. The idea was found very interesting by the participants but none of the participating DPs has presented a plan to mainstream the ideas in that way. What is even more interesting, one of the DPs consisting of the private companies admitted that they are not going to implement their results after the end of the project without external financing. It seems that **more attention to the use of this way of mainstreaming should be paid in the future**.

### 3.3. How to implement effective solutions elsewhere?

Possibility of implementation of DP's results elsewhere is probably the most important issue of the EQUAL Initiative. Nevertheless innovative projects are important and successful especially if the results are applicable on the broader scale than the partnership used it. It should be stressed that **transposition of the results** is not the same concept as mainstreaming and sustainability. Under the concept of transposition we understand effective use (implementation) of the results to solve similar problem in the different country (or region) with a different economic and legal surrounding, which is broader concept than mainstreaming and sustainability.

It should be stressed, however, that not all the projects could be easily transposed to the other countries or even regions. If the project is aimed at the very specific sector of an industry, or a region with very specific problems, or partly depends on legal framework (or even proposes new legal acts), direct implementation is of course impossible. In most of the cases participants of the workshops were certain, that the experience and results are possible to be implemented elsewhere, but adjustment to the local circumstances is necessary.

#### 3.3.1. Innovative solutions vs. innovative ideas

The material products presented during the workshops should be divided into two groups. The first group consists of materials, experiences, programs, reports etc. that could be referred to as **methodology or tools**. When a partnership tries to solve a specific problem, i.e. to facilitate in-work training (or produce a manual supporting further actions in a specific area, prepare set of IT tools to improve management in SMEs, develop a method to support sectoral/regional network of cooperation), the material result to be implemented elsewhere is a methodology (or set of IT tools, report which helps to disseminate experiences, good practices guides to be modified and implemented by the others etc.). These products can be easily disseminated and used by the others, although they usually need significant changes to correspond with the different legal or economical surrounding. Good example here is e.g. the result of one of the partnerships concerning the flexible work management – the model of flexible work contracts to be used by the employers. Of course such a result has to be adjusted to the labour code of the other countries. But the method of designing the model contract and first of all the specific form of the flexible work designed could be used by the others. In some cases the result could be used almost directly – that is true especially in case of the IT solutions to support management and consulting.

The second group is less numerous and consist of partnerships with the most innovative results. Here not only manuals and good practices are important – but the **inspiring idea itself**. All of the DPs were innovative in their approach to the adaptability problem, but only some of them tried to develop completely new forms of employment, consulting or cooperation. Best examples here are three DPs: Décrire la convertibilité, InoCoP and e-Change.

First of them was found very inspiring with its idea of reconversion units. Specific solutions in creating such unit, good practices and guides – all the supportive infrastructure was designed specifically for the needs of DPs and probably could not be implemented elsewhere without changes. At the same time the idea of reconversion units was highly praised by the workshop participants, who agreed that this solution could and should be used in other countries.

Second interesting example of a new idea was provided by InoCoP partnership, which aimed at creating and supporting automotive industry clusters. Enterprises within the cluster are encouraged to cooperate closely, exchange information and conduct joint R&D programmes. Although the experiences of the DP may need significant adjustment to be implemented elsewhere, the core idea of the cluster was found effective and inspiring.

Third highly innovative partnership was e-change, which developed new model of employers grouping. The material results – in the form of guides of how to constitute and manage this new – will be indeed very useful for the future transposition of the idea, but participants of the workshop agreed that the most interesting result is the new idea itself and that it could be a basis for similar innovative actions in other countries.

It is possible to identify a number of other highly innovative projects, but in these three cases the difference between innovative implementation of support and innovative form of support is best visible. And although new operational solutions and sets of good practices are very important, it seems that the highest potential for successful dissemination is in the projects with a completely new idea behind them. The former can change the

method and the way the support to adaptability challenges is provided and the later shows us completely new fields of activity and possible support.

### 3.3.2. Barriers and problems

During the exchange of views on the dissemination and transposition of the results, DPs often concentrated on the problems they had during their projects and the possible ways to avoid them. As the very important part of experience sharing is not only **copying successes** of other DP but also **avoiding their mistakes**, it is worth briefly summarising those discussions.

The most often mentioned problem was the **lack of time of the beneficiaries**, especially the managers. That was the case of all the companies, but perhaps the problem was the most serious among microenterprises. Many DPs commented that at the initial stage of the projects aimed at the employers and managerial staff, recruiting the participants was a great problem. The main reason was of course the lack of time, especially in the smaller companies. At the same time it is worth noting that when company is involved and see positive results, the motivation to devote time is much greater than in the initial phase of the project. Some partnerships have taken into account that problem and tried to concentrate their activities in such a way that would allow to minimize the interferences with the company's everyday tasks.

Another problem was the **involvement of employees** endangered by the restructuring processes or feeling insecure for different reasons. In some cases they were reluctant to participate in training because they felt that their involvement would reduce their availability for the employer and thus increase the probability of losing the job. Probably the second problem behind that is the fear of stigmatisation (possibility that employer would recognise someone who has to participate in training programmes as less productive). Although such problems were mentioned by two partnerships only, they should be analysed carefully, as such attitudes of employees and employers are opposite to those expected and desired by the partnerships. It seems that the only solution here is to get involved both employees and employers and to strengthen the social dialogue process.

A very important issue both for the recruitment and for the further mainstreaming and dissemination processes is the **ability of proving that the planned activities will bring gains to the involved beneficiaries**. That is especially important to convince companies that participation will result in an increase of adaptability and competitiveness which are worth more than the time of managers and employees involved in the project. Such a proof – in form of reports or conferences for employers associations – is also essential part of the results. Some participants underlined during the workshops that this part of the results is very important but unfortunately underestimated by the DPs. It seems that more attention should be given to it, as it is vital for mainstreaming and dissemination of the results.

The problem of **involving all parties into the partnerships** and making the empowerment process effective concerns sometimes not only beneficiaries but also potential partners. Although such examples are less frequent, some partnerships complained that they were unable to cooperate effectively with associations of employers, trade unions or even public employment services. In some cases it seemed that the problems were of more political or institutional origins (e.g. competing organisations that did not want to cooperate) and not related the nature of the project itself. One partnership described its problems with constituting the partnership and making the cooperation efficient as the result of the lack of similar organisational experiences in the region. The problem of involving all the potential partners into the partnership was not a major problem in any of the presented DPs and it caused delays and modification of the original plans in few cases only.

Other problems were less common and of management nature and they consisted mainly of financial problem (delays in the flow of funds) and delays in public procurement procedures.

### 3.3.3. Different business and legal environment

The most important barrier during applying EQUAL solutions elsewhere is **different legal, cultural and business context**. What worked in one country does not have to be the best solution in the other. These barriers were mentioned by the workshop participants as the main obstacle to direct transposition of other DPs' products. Although this problem was mentioned in subsections 3.1. and 3.2., some general remarks should be given in the context

of dissemination and implementation of the results elsewhere.

The best visible – and the easiest to identify – are **differences in the legal framework** of a given country (or even a region or sector, if there are regional or sectoral regulations in force). When using others experiences these differences are visible from the very beginning and therefore they are not very problematic, although they could make the whole concept inappropriate. For example if the main reason of early withdrawal from the labour market is due to the regulations in retirement and disability pensions, the training for the ageing workers and fighting with discrimination will be much less effective. Also some flexible work arrangements prove to be illegal under different labour code. During the workshops the different legal framework was mentioned as a potential obstacle especially in the context of flexible work and age management and was not recognised as an obstacle for IT orientated projects. It could also be an obstacle for some activities within restructuring projects, although those were rather aimed at enhancing cooperation and training – and for such activities different regulations in general should not be a barrier. Legal framework might be important for projects concentrated on age management (see example above), but in general it should not influence effective solutions significantly.

All the EQUAL projects require strong and efficient cooperation within the partnership and with the beneficiaries. The **development of institutions** crucial for that process – business associations, trade unions, local agencies etc. – and the way they work **is very different within the EU**. That can form a significant barrier for implementing solutions which need strong cooperation and social dialogue. Some of the problems encountered by the partnerships were mentioned above – e.g. difficulties with involving beneficiaries or trade unions – but as the more general obstacle the possibility of insufficient development of specific but necessary institutions should be identified.

The obvious barrier could be the different problem – or the different reason behind the problem. Although ongoing **economical processes** could produce similar statistical effects, they may be **of different origins**. For example the low level of labour market flexibility indicated by underutilisation may be the result of many factors, also the nature of the discrimination of ageing workers or women may differ. Therefore using someone else's solutions can not be performed automatically, without studies on the local economic situation and the careful modification of the activities.

Last but not least, the **cultural surrounding** may form an obstacle. For example one of the features of the excluded people in the post-communists countries is a strong belief that they do not have a chance for success and all the support should be provided by the state. Getting these people involved requires different measures than provided in other countries. Other example of potential cultural barriers could be different reasons and forms of discrimination of woman or other groups.

## 4. How to deal with the challenges of adaptability – what have we learned from the Development Partnerships' experiences?

The aim of the last chapter of this report is to give a summary of the experiences of DPs participating in the *Adaptability Peer Review*. It begins with brief comments on the activities used by the DPs to deal with the adaptability challenges. The summary of the activities is provided in section 3.1. of chapter 3. – in this chapter we concentrate on the broader view on the activities in context of adaptability issues. We also try to provide kind of lists of possible solutions to the challenges of adaptability.

Second section of this chapter is devoted to recommendations. We do not only enumerate the comments of workshops' participants on the possible ways of improving the way the projects are conducted, but we also try to draw more general recommendations from all the knowledge we have gained during the *Adaptability Peer Review*.

The chapter – and the report – is closed with few concluding remarks.

### 4.1. EQUAL solutions to the challenges of adaptability

At the conference's closing session one of the participants expressed a hope that thanks to all the information and comments gathered during the workshops it should be possible to prepare a list of solutions that work and are reasonable EQUAL solutions to the challenges of adaptability. We are sure that such a list should be given in this publication, at the same time it is important to stress, that potentially it might be unlimited, as it is impossible to enumerate all potential challenges of adaptability and possible solutions. What we try to do in this section is to give an overview of the most important activities that DPs participating in the conference have undertaken.

The main ways of the intervention conducted by partnerships are possible to be summarised in five broad categories, including training activities, cooperation enhancing activities, tools and actions aimed at increasing exchange of knowledge and information, consulting and managerial support activities and preparation of manuals and best practices guides.

#### 4.1.1. Education and training

Increasing skill and competences of beneficiaries (including managerial staff) was a central part of many DPs. At the same time none of the DPs limited itself to the training itself. The training alone would be hardly innovative and what is even more important, thanks to the complexity of the projects the training and education services were provided more effectively and with better results.

As the skill depreciation is one of the most important issues within adaptability problem, it is not possible to adapt without significant **effort on education and training**. Both for employees and employers the process of adopting to change is connected with getting new knowledge. This knowledge does not have to be provided in the form of training but very often training is the most obvious solution. That explains why so much of the effort of the DPs was concentrated on training. In some cases training was just complementary to the other activities, in the others the main results were new methods of training for specific groups or higher capacity of the training system.

It seems that training is at the same time the most traditional and very popular way of answering the adaptability challenges. In practice, active labour market policies conducted by employment services in many countries are concentrated on training activities as training is very easy to organise and potentially might be very effective. At the same time the training programme has to meet the needs of the local labour market and those of the participants – otherwise it can turn out to be completely ineffective. Therefore EQUAL experiences in this field are very important – especially those, which will help to prepare better training programmes for specific groups in the future.

#### 4.1.2. Sectoral and regional cooperation

The idea of cooperation, believe that together stakeholders can solve the adaptability problems more effectively, is very important for the EQUAL initiative. The way the EQUAL financing is designed encourages different parties to form partnership and to solve the problem together. Many of the DPs went further than just creating a partnership to solve the problem – they also tried to **encourage the beneficiaries to cooperate**, form thematic networks and tried to find out the best solutions to the adaptability challenges.

Particularly interesting examples of cooperation were provided by the partnerships dealing with the restructuring issues. Enhancing a sectoral cooperation – including joint financing of R&D activities – is a way to increase the competitiveness and adaptability of all involved companies. Other examples of cooperation were given by the partnerships operating on the regional level. In this case the main aims of the cooperation were to help in dissemination and mainstreaming processes, but also to improve the exchange of information on the e.g. vacancies and thus make the labour market more flexible.

The cooperation and creating networks in case of projects presented during the conference was not limited to the cooperation of companies (or business associations). It also included regional development agencies, local NGOs, local authorities etc. Workshops participants paid great attention to the issue of cooperation and expressed an opinion that cooperation of all involved parties is a crucial issue for empowerment, mainstreaming and dissemination of the results. In some cases creation of successful and formal cooperation is a guarantee of sustainability of the results.

#### 4.1.3. Exchange of information and knowledge

The exchange of information is closely related to the cooperation – but in many cases DPs aimed at better exchange of information without creating a formal cooperation framework. **Facilitating the exchange of information** was conducted on two main levels: inside the organisations (e.g. between the employees or managerial staff of the company) or between the different players (e.g. within the sector or between employers and job seekers). The inter-organisational exchange of information in most cases had a form of training or managerial support (described in subsections 4.1.1. and 4.1.4.).

Many interesting examples of facilitating knowledge and information exchange were provided by the DPs active in the field of IT skills. Using websites and other communication technologies they improved the functioning of the labour market (e.g. MITE) or cooperation between SMEs.

#### 4.1.4. Consulting and managerial support

Different kind of **services for business** (and its employees) formed very important part of most of the partnerships. In fact the consulting and managerial support formed usually part of the broader service for the employers, including training, development of IT tools, introduction of best practices or fighting with stereotypes.

Such activities could be used in all thematic fields. They are particularly important in case of microenterprises and SMEs, as they often cannot afford consulting services. In such a case the activities of DPs were innovative in the ways they were targeting the beneficiaries and approaching them with the consulting services. Some of the DPs activities were aimed at designing **new forms of consulting** – e.g. support in introducing age management, job sharing or knowledge transfers methods inside the companies. Such activities were often not limited to the smaller entities only, as in many cases all employers share similar problems regardless of the number of employees.

#### 4.1.5. Methodologies, best practices and IT tools

Methodologies and best practices formed a very important part of all the DPs. When DP aimed at developing new way of e.g. training or sectoral cooperation, the description of new methods was the most important product of the partnership. Guides prepared (or to be prepared) by the DPs include variety of results, depending on the activities conducted by the partnership.

In fact description of actions undertaken by the partnerships, with practical information on implementing and evaluating them, is the most **important dissemination tool** and as such is the crucial material product of the DP. In some cases those reports are planned to be a summary of the project, in others materials are delivered as supportive products for conducting part of the activities planned during the project. In both cases they are the easiest form of sharing the experience and the way of translating the activities and results into material product of the DP. Also the IT tools developed by some of the DPs belong to this category.

The guides, methodologies and tools prepared (or to be prepared) by the DPs include:

- **methodologies** of: age management, e-learning, identifying SMEs and microenterprises needs, time management, flexible forms of employment,
- **new models of:** job-sharing, knowledge management, local social management, business performance management,
- **models of cooperation:** local labour market functioning, employers' grouping, sectoral cooperation of enterprises, industrial cluster cooperation,
- **IT tools** supporting management, including: knowledge management, SMEs and microenterprises management,
- **best practices and guides to:** work life balance in the company, support of specific disadvantaged groups, social management.

Some of the ideas presented during the workshops deserve more explicit presentation. Although activities of all the DPs were interesting and innovative, the particular attention of the participants was given to the following ideas:

- The **model of employers grouping** – proposed by e-Change partnership – the way of making part-time job more attractive and provide training to the part-time employees.
- The **methodology of reconversion units** – Décrire la Convertibilité – very interesting method of supporting employees endangered by collective dismissals.
- The methodology of industrial cluster – InCoP – method of creating and supporting intersectoral cooperation to facilitate competitiveness.
- The **methodologies of hidden skills assessment** – used by various partnerships – the tool to help disadvantaged employees (especially ageing) by identifying and increasing their skills and potential.
- **IT solutions** to improve functioning of the local labour market – MITE and some elements in other partnerships – to improve cooperation and information exchange between different parties, help disadvantaged groups and improve functioning of labour market.

## 4.2. Recommendations for the future

Although EQUAL initiative will not be continued during the next programming period, projects similar to the EQUAL partnerships discussed in this report will be financed from European Social Fund. One of the aim of *Adaptability Peer Review* was to provide remarks on the possible changes in the future programming of the ESF support for innovative activities. Although DPs experiences presented during the conference were very interesting – and their activities very fruitful – it seems that there is still a room to improve the way the ESF resources are used. The last section of this report is therefore devoted to the recommendations for the future. Our aim here is to enumerate issues that seemed to be underestimated by the DPs – or pointed out by them as important and deserving more attention.

It should be noted, however, that the remarks are based only on a small sample of the Development Partnerships which participated in the conference. Therefore they should be interpreted not as recommendations for all innovative EFS projects during the next programming period, but rather as the possible improvements of projects operating within the fields discussed during the seminar.

### 4.2.1. Better mainstreaming and dissemination

Basing on the experiences of the DPs that participated in the conference it is hard to formulate final opinion on their mainstreaming and dissemination methods, as the presenting DPs were far from the end of their projects. Basing on the discussion during the workshops it is possible to give just few remarks on that processes.

First of all it seems that the results possible to be implemented in other countries, including material results like IT tools or best practices guides, are not always **available in English**. During the presentations DPs often referred to the websites, programs or publications available only in their national languages. As English is the most popular foreign language in most non-English speaking countries it would be valuable if crucial DP achievements were documented also in English. Of course not all the materials need to be translated to English, but for sure the dissemination process would be much easier if not only some promotional or concluding materials were available in English (which should be an obligatory requirement), but also for example the IT tools for improving management. That would greatly facilitate both dissemination and implementation of the results in other countries.

Important part of dissemination process should also be the transnational cooperation. Many DPs conducted successful cooperation with foreign partners, including implementation of similar activities in other pantries. For some of the DPs transnational cooperation seemed to be less important. That issue was not discussed in the details during the workshops so it is hard to draw final conclusions, but it seems that **EQUAL projects could benefit from greater transnational cooperation**. This is however not a rule for all the projects, so the requirement of forming transnational partnership should not be obligatory.

In case of horizontal mainstreaming it seems that stronger cooperation with social partners is needed. It is not always possible and strongly depends on the labour market institutions in the given country (as described in chapter 3.), but DPs should do their best to involve social partners into their activities – and including them as partners might be the best solution in many cases.

#### Recommendations:

- Important results, including programs (IT tools) and methodologies, should be available in English.
- When possible, partnerships should be encouraged to more intensive transnational cooperation.

### 4.2.2. New ways of ensuring sustainability

A lot of time during the workshops was devoted to the issue of sustainability. The participants agreed on the necessity of ensuring financing support and the importance of cooperation and capacity building (see chapter 3.). Special attention should be paid to the conclusion that in some cases it is possible to guarantee sustainability of the results even without further public support. Basically, it is a case of cooperation networks and solutions that

could be provided on the commercial basis.

In case of the cooperation networks such teamwork – if formalised during the project – might well be continued after the end of the project. Good example here is a cluster within a specific industry or cooperation network of SMEs. The DP should do its best to ensure that such cooperation will be possible after the formal closure of the project and that the involved parties are equipped with all necessary tools. The cooperation will sustain only if cooperating entities will see the benefits coming from the cooperation – so one of the products has to be a research showing that this is the case.

Commercial implementation of the results is possible in many cases within training, consulting and IT tools. The idea behind commercialization of the results is that if the service provided by the DP improves the market position of the company (or employees) it has a value that could be voluntarily paid by the beneficiaries (entities using the service in the future) if the gains are greater than the costs. Therefore, sustainability could be ensured by offering services (based on the methodologies and best practices developed by the DP) to the employers and their employees on the commercial basic. Such a service could be provided by one or more of the partners or even by the external entities, like HR consulting companies, development agencies, business associations and trade unions. Important precondition here is the convincing evidence that such an implementation is possible, i.e. that benefits from specific activity are greater than costs. Such evidence should be obligatory in case of the projects where possible commercial implementation is foreseen.

#### Recommendations:

- Ensuring the continuity of the cooperation of beneficiaries should be supported by incentive mechanism in case of the projects where activities include creation of industrial clusters or other formal forms of the cooperation of beneficiaries.
- A study of the possible commercial implementation of the results should be obligatory for all the projects including consulting activities or managerial support (including new forms of work organisation or new training methods).

#### 4.2.3. Local vs. national level and the DP's composition

The DP's composition is a very important factor, which was described in details in section 3. It is hard to draw final conclusions basing on the only 16 DPs in that specific matter. Therefore our recommendations in that specific point are very cautious and preliminary.

During the workshops it seemed – and that was also the feeling of some of the participants, expressed during the closing session – that a little bit **more effective and successful are local partnerships** concentrating on very specific and well defined problems than broad partnerships operating at national level with a wide area of aims and activities. Also the most innovative partnerships concentrated on implementing some new ideas (well defined from the beginning of the project) seemed to be more effective. The above does not mean that other partnerships were not successful, but that those local and with limited and well designed number of activities achieved a more comprehensive results, easier to mainstream and disseminate. The reasons behind that are relative (comparing to national level projects) simplicity of diagnosing the problem, finding solutions and involving the beneficiaries. Although it is hard to judge from the limited financial data we have, it is also likely that support in local projects is more concentrated and therefore results might be a little bit more impressive.

It is important to remember, however, that not all innovative solutions to the adaptability challenges are possible to be developed and implemented at the local level (e.g. industry clusters). Also results of the local partnership could be more difficult to be transposed elsewhere.

An issue related to the level the DP operates is the DP's composition. Important local partners seemed to be more likely to involve in the partnership and commit more of their efforts to the project success. As the involvement of partners dealing with the problem diagnosed by the partnership is essential for success it might be another reason of slightly better results of local partnerships.

#### Recommendations:

- Preference should be given to the local projects concentrated on the specific and well defined problem or to the most innovative partnerships with a well defined new concept to be tested.
- Strong preference should be given to the DPs including important parties dealing with the diagnosed problem in their everyday activities.
- The support for the DPs with a high number of activities and willing to solve many different problems at the same time should be granted on the basis of well proved diagnosis and comprehensively planned activities.

#### 4.2.4. Better diagnosis and measurement of the results

Proper diagnosis of the problem is essential for preparing successful intervention. Although partnerships conducted appropriate diagnoses, it seems that improvement could be achieved in this regard. The diagnosis should be detailed and linked to the planned method of measuring the results. Also the **linkage between the diagnosis and planned activities** should be made clearer.

As mentioned in chapter 3., participants did not pay much attention to the problem of measuring the results. Of course in case of all the DPs the results are measured within the reporting on the project realisation and its results. The partnerships seemed to be a little too optimistic in their assessments of the effects. Another problem is that methods used during the evaluation of the results might not include controlling for the important external effects that are not visible in the project's statistics.

**Proper measurement and evaluation** of the results should include quantitative analysis controlling for deadweight loss and substitution effect and comparison to the other measures of support used in the particular field. It is a particularly important in case of the projects which results are to be used after the end of the partnership. And it is a must if the solutions are to be mainstreamed to the regular public intervention financed from the national or European funds or if they take form of proposals of legal acts adjustments.

**Reliable and comprehensive analysis of the results** should also be more extensively used as a tool to support mainstreaming and dissemination process. An involvement of external evaluator could be a suitable option in case of the most interesting results.

#### Recommendations:

- The DPs should be obliged to give more attention to the problem of measuring the results; perhaps the guidelines for the partnerships should be modified and made more demanding at that point. The linkage between diagnosis stage, the planning of activities stage and result measurement stage should be made more transparent.
- Managing authorities should consider conducting an external evaluation of the results in case of the most interesting projects, which results could be mainstreamed into the ESF or other public source financing.

## 4.3. Conclusions

The conference and materials provided by the participants gave us a unique opportunity of summarising and comparing different approaches to the challenges of adaptability, presented by 16 Development Partnerships from 7 European Union member states. Although most of the DPs are still far from finishing their projects, a lot of evidence on their activities and planned results and products was provided.

The adaptability challenge varies significantly between the member states – age management is more urgent issue in those facing the demographical structure change, while in case of the others the main problem is ongoing restructuring process or underutilisation of the available IT technologies. Also promoting flexible employment might be a different issue depending on the legal and economic environment. At the same time there are factors common to all regions and countries.

First of all adaptability means changes – changes in the skills of employees, the way the business is managed, the competitive pressure on the companies. To adapt, companies and employees have to change their ways. This process might be more or less painful – and the aim of the EQUAL projects is to design the best possible way of the adopting to changes. But changes itself are inevitable, as the world is going on faster and faster, new technologies are being introduced constantly and the competitive pressure is growing.

In fact the process of adapting to changes is the process of learning and increasing skills. That is true not only in case of the employees, but also companies, industries, social partners. Therefore the different projects presented by the DPs had one common point: they all concentrated on developing and implementing new ways of gaining knowledge. In practice those activities have different forms – starting with the just new methods of training, through the better exchange of information and knowledge within the company, to the development of new ways of joint R&D activities.

As the main idea behind enhancing adaptability is clear, there are many ways of achieving the goal of flexible, competitive and at the same time socially secure labour market. EQUAL projects try to find out what can and what should be done to ensure at the same time high productivity and competitiveness of the companies and security and inclusive practices for the workers. The experiences presented during the workshops prove, that it is possible to combine goals (sometimes contradictory) of different parties to achieve improvement of situation of all involved beneficiaries. They also show how important is the concept of cooperation and social dialogue for answering to the adaptability challenges.

Solving new problems – and adaptability problems are *ex definitione* new – require innovative approach. And innovative approach means that not all of the actions taken and not all the achieved results meet the expectations and hopes of the involved parties. But without the possibility of looking for the new solutions, we lose the chance to work out new ways of solving the adaptability challenges. The outcomes of the *EQUAL Solutions to Challenges of Adaptability – Adaptability Peer Review* conference proved that conducting innovative projects in the fields of the age management, IT skills, flexible work management and restructuring is effective. Additionally, we can learn a lot using others experiences to deal better with the challenges of adaptability.

NOTE:



