

# Action research in employment

Evaluation of selected projects (1997/98)

Active policies for labour market management

Employment & European Social Fund

Employment & social affairs



European Commission

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**European Commission**  
Directorate-General for Employment  
and Social Affairs  
Directorate A.1

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## **I. ACTION RESEARCH IN EMPLOYMENT**

This report reviews the outcomes of a number of projects co-financed by the European Commission, DGV (Employment, Industrial relations and Social Affairs) during 1997 and 1998. The aim of the initiative<sup>1</sup> was to draw methodological lessons from especially interesting experiences which might lead to new avenues of job creation of relevance throughout the Union.

### **ACTION RESEARCH**

All projects are based on the research action method, which is a well known research approach in the social sciences. Research action combines theoretical analysis with practical demonstration of a given hypothesis, involving academics, researchers and practitioners. This approach also generally has the advantage of helping the actors involved to express themselves and to enhance their capacity for action.

By bringing together people, who, in their own particular contexts, are facing the same or similar challenges, the aim of this approach is to start a process of focusing on an issue, to emphasise its characteristics, and to generalise the experiences of participants. This approach is valuable for identifying the common obstacles and core aspects of a given problem, but more particularly for highlighting feasible solutions. It goes beyond the simple presentation of successful experiences in that partners are encouraged to identify the decisive elements/factors which can be extracted from the particular context and applied on a more general level to enhance other actions.

The original idea was therefore not to finance projects as such but rather to make it possible for stakeholders to meet and give structure to the analysis of specific issues through the transnational networking of experiences (however they are financed) underway in several Member States.

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<sup>1</sup> Research actions of an experimental nature aimed at promoting the exchange of experience and the generalisation of good practice and knowledge in selected priority fields of employment policy. Call for proposals published in OJ EC C/114, 19 April 1996.

## **WHY THIS CHOICE OF METHOD?**

This way of working, the research action approach, fulfils two immediate objectives. Firstly, direct involvement ensures that participating partners benefit directly from the results and share in a learning process as the project progresses. Secondly, the experimental nature of the projects provides fresh knowledge, for example on job creation, which can be generalised and promoted at Community level. In line with this, some of the reports presented here place their project topic in a broader context, reflecting how the activities focused on may complement or replace tools/policies that no longer fulfil their (employment creating) objectives. These two elements are significant.

The dissemination of results should permit as many interested parties as possible to learn about and benefit from the conclusions drawn.

In sharing and organising in a more formal way the exchange of related experience, participants should derive inspiration for further action to complement or replace their previous activities. To the extent that such activities involve new partners, who themselves may afterwards initiate new initiatives, the lessons learned from action research projects (i.e. the generalisation of results) will be subject to the multiplier effect.

In addition to this, this report attempts to give a more general introduction to the range of activities taking place across Member States – at local and regional level in particular – to combat unemployment by creating new jobs and lasting employment. The underlying philosophy is that despite specificities of "areas", lessons from individual regions/cases can also enrich and improve what are already considered to be good practices in other regions.

Furthermore, as was experienced in some of the projects, transfer need not only be from the most to the least developed regions; less well developed regions often activate innovative intervention schemes, thereby sometimes becoming laboratories for new policies for wider local development and employment.

The presentations here also concentrate on the institutional and management elements of the process of making things happen. This is particularly important where protagonists, who have not traditionally worked together on a formal basis, need to collaborate in order for objectives to be attained.

A list of all the partners involved in each action research project is annexed to the report. If the nature and findings of particular projects are of interest, readers are encouraged to seek further information by contacting the participating organisations.

### **THREE THEMES REFLECTING THE EMPLOYMENT AGENDA**

To begin with, three particular themes were chosen, corresponding to the guidelines included in the principal Community policy initiatives in the employment field (White Paper on Growth, Competitiveness and Employment, Conclusions of the European Councils concerning the European strategy for employment, President Santer's Confidence Pact). Today, these priorities are fundamental elements of the Employment Guidelines, according to which Member States have agreed to establish their national employment policies. The three priority themes were:

**Development of local employment.** Actions encouraging local development and employment initiatives – focusing, for example, on the job potential of local partnerships in responding to needs not satisfied by the market.

**Active policies for labour market management.** Actions aimed at enhancing the effectiveness of labour market management, in particular by improving local services and employment services and, by promoting integrated information, guidance, training and placement facilities

**Company employment policy.** Concentrating primarily on actions in favour of employment which are related to new methods of organisation of work and working time.

In the selection of projects, care was taken to ensure the diversity of issues covered as well as the representativeness of the partners involved in the programme. As far as the topics are concerned, selection criteria were the possible links with work already completed on the issue, the level of knowledge of the services of the Commission about the area, as well as the degree of innovation. The possibilities of incorporating the results into the European Employment Strategy were also considered.

Finally, as indicated in the call for proposals, specific priority was given to projects which took account of the needs for social groupings requiring particular attention, such as young

people in search of their first job, the long-term unemployed and unemployed women, as well as to projects aiming at preventing unemployment and in particular long-term unemployment.

Commission staff, from DGV, followed each of the projects from its inception, taking part in meetings, seminars and other events. However, the selection of project partners and particular case studies, the management of the project, as well as the conclusions drawn and recommendations provided, were the responsibility of the partners involved alone.

The individual projects and main outcomes are published in three reports, one on each of the above mentioned themes. Although they may differ slightly in style, all of the reports are structured in the same way. This chapter of common introduction is followed by a synthesis of the main findings of the projects under each strand, where relevant linking these to each other as well as to elements of the European Employment Strategy. Chapter 3 contains abstracts of the individual projects. In the annex, a list of the partners and coordinators involved in the different projects can be found.



## II. EVALUATION OF ACTION RESEARCH PROJECTS – ACTIVE POLICIES FOR LABOUR MARKET MANAGEMENT

### 1. FIELD OF ACTION

The nine action research projects considered in this section are linked to the issue of *active policies for labour market management*. They are aimed at enhancing the effectiveness of labour market management, the improvement of local and employment services and the promotion of integrated information, guidance, training and placement facilities.

Labour market management is a key element in the European Employment strategy particularly in relation to the Employability Pillar of the employment guidelines. Five priorities are set, all aimed at developing opportunities and incentives to seek and take up work or training. Specifically, concrete actions to be implemented pertain to the following objectives:

“Implementing a preventive approach so as to significantly reduce the inflow of young and adult unemployed persons into long-term unemployment (guidelines 1 and 2)”

“Shifting people from welfare dependency (passive measures) to work and training. (guidelines 3 and 4)”

“Developing partnerships as a framework for the provision of training and lifelong learning (guidelines 5 and 6)”

“Facilitating the transition from school to work (guidelines 7 and 8)”

Promoting a labour market open to all (guideline 9).

*Employability* is a complex concept linked to the ability of the workforce to *find* and *keep* a job. Two different dimensions are included: one is the capacity to gain access to jobs and the other is the capacity to maintain jobs. Both dimensions refer to the adaptation capacity of the workforce, but an important role is also played by social networks and the specific demand-side context of local labour markets. A broad policy approach is then to be considered, focussed on employment services integrating active, tailor-made, preventive measures to improve the access dimension (information, counselling, placement services, etc.) with the training and incentive aspects,

crucial for the improvement in maintaining jobs.

This new approach affects the management of employment services: the focus shifts from a curative to a preventive, individualised approach. Local level networks and employment services as co-ordinating devices become important elements, in an employability strategy, together with client centred and market oriented approaches to service delivery.

According to available evaluation literature, active labour market policies, and among these, employment services and life-long training, are measures that may help in promoting the employability of the labour force. Some elements in the management and provision of employment services and in the design of active labour market policies appear particularly relevant in enhancing the effectiveness of such policies:

The market orientation of programmes. Programmes linked to regular labour markets appear to be more effective in improving the employability of the labour supply. Specifically the attention to firms’ needs and measures aimed at employers are relevant in influencing results and improving placements in regular jobs;

An integrated approach to policy design and the creation and support of local networks of services. The co-ordination with income support measures, in order to reduce disincentives to job search, is considered particularly relevant;

The quality of staff and management;

The presence, since the beginning, of on-going monitoring and evaluation procedures.

The projects here reviewed develop these elements and offer interesting insights and “good practice” experiences on which it is possible to build in order to improve the management of active labour market policies.

### 2. PROJECT CHARACTERISTICS

Table 1 summarises the main characteristics of the nine projects considered. Most projects are aimed at individuating effective modes of intervention to improve the labour market situation of the unemployed. In particular three aspects common to all the projects here considered are worth underlining:

The *building of networks of different actors* sharing competencies and experiences (public

operators, consultants, academics, social partners,...). An interesting feature of these projects is indeed the direct involvement of these very different actors and the consequent development of a common language and modes of co-operation.

The *identification and diffusion of best practices and experiences across countries with different labour market structures and approaches*. The involvement of operators and institutions in this process appears to be important in stimulating a learning approach to decision-making and to policy implementation, and through attention to others' experiences, reflection and evaluation of adopted measures. In addition, the creation of networks of operators and public agencies among Southern and Continental/Northern European countries, which present very different labour market conditions and institutional approaches, is important for the development of an European approach to labour market policies.

The *targeting of policies* to specific problems/groups: the long-term unemployed, low skilled immigrants, women re-entering the labour market, unskilled workers.

Most projects are aimed at the development of *new methodologies* (such as the provision of a new methodology for on-going self-evaluation by project managers; or the standardisation of good practices in the provision of employment services; or the development of an integrated approach to employment services) and/or *new actors* in the provision of active labour market policies (as in the case of mutual and bilateral social protections institutions). Some projects experimented with integrated employment measures aimed at *specific target groups* (immigrants, low-skilled female adults, long-term unemployed, cross-border workers).

### **3. INPUTS OF RELEVANCE FOR THE EUROPEAN EMPLOYMENT STRATEGY AND MAIN RESULTS**

All nine projects may, to a varying degree, be linked to the Employability Pillar of the Employment Guidelines and provide interesting inputs relative to the activation of labour market policies, the diffusion and implementation practices and the development of new areas of intervention. This latter is sometimes very specific (as in the case of policies for remigrants and for cross-border workers), but in others more general (as in the case of developing methodologies for active

labour market policies). Most projects relate to the provision of public employment services and provide elements for an effective implementation of such services, while one project deals directly with unemployment prevention measures in cases of business crisis and restructuring. In the following the projects are considered in light of the various employability guidelines.

#### **3.1. IMPLEMENTING A PREVENTIVE APPROACH TO REDUCE INFLOWS INTO LONG TERM UNEMPLOYMENT**

The aim of these guidelines is to increase the effectiveness of labour market policies in fighting youth and long term unemployment, by shifting towards an increasingly preventive approach underpinned by *early identification* of individual needs and *early action*.

Most of the action research projects here reviewed, deal with re-insertion measures based on the perception that the large stock of the long-term unemployed and the hard to place requires specific measures and privileged attention. Four projects are particularly interesting relating to this issue: three on the role of guidance and integrated employment services in tackling the long-term unemployed and one on the prevention of lay-offs.

The comparative assessment of guidance and employment services for the long-term unemployed conducted in these projects underlines the different approaches adopted by European countries, reflecting differing perceptions of the nature of the long-term unemployment problem in each country. While in the cases considered, the unemployment experienced by Northern European partners is often the consequence of non-labour market related characteristics (such as health and social problems) and requires long term targeted intervention; in the case of Southern European countries, unemployment is more diffused across the population (especially among women and the young), being linked to the lack of employment opportunities and requires a wider range of measures.

The effectiveness of service delivery is a key element in the provision and implementation of a preventive approach. Three projects<sup>2</sup>

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<sup>2</sup> These projects are : *The role of guidance in tackling long-term unemployment; Network of European Cities-IOFI; Active monitoring.*

underline some important aspects which are relevant in this respect:

the importance of *networking and cross-agency working* aimed at co-ordinating guidance with training and other services involving the local social partners and firms. Services addressed to the long term unemployed are more effective in local areas characterised by greater integration between guidance, training and other services and by greater co-ordination among public and private institution operating in the field;

*one stop or single counter approaches* which offer integrated services to the long term unemployed. Beneficiaries prefer if they can find all the information/services they need in the same place and if the same provider personally supports them. This approach requires, other than inter-agency co-operation, increasing the links between employment and social systems;

*self-help information and use of Information Technology in providing information and guidance services.* To enhance access to services, especially in remote areas, Information Technology is increasingly used in a number of countries, particularly in the UK and Sweden;

*targeting services* to the needs of particular groups. The most effective services are the ones specifically addressed to the needs and problems of each target group;

*flexible and market driven services.* The mismatch between the skills of the long term unemployed and available jobs can be reduced by a more active intervention by public services acting both on the supply and the demand side. A greater understanding of local labour market conditions is necessary, to try to assess the employers' recruitment needs and supporting the long term unemployed in meeting those requirements;

*special attention should be given to the design of funding regimes.* If funding is outcome-related, the long-term unemployed may be induced to choose inappropriate jobs with a consequent abnormal increase in labour turnover and in the probability that beneficiaries return to an unemployed status;

*clear, coherent, effective and accessible objectives* must be identified for career guidance by policy makers, which should also *finance long-term services.* European funding should finance innovative approaches, while national and local funds should be used to sustain long-term provision, which is unlikely to be effective if based on short-term funds. It

is important that policy makers understand that guidance and employment services can only assist individuals in exploring available jobs, they cannot create employment on their own. Growth policies and specific measures should be aimed at creating new jobs and training opportunities;

the necessity to *train, qualify and regularly update service providers*, and to develop a continuous monitoring and accountability system to monitor the effectiveness of policies<sup>3</sup>.

A company-based prevention approach in order to avoid or minimise lay-offs and long-term unemployment among redundant workers is an important element in order to reduce inflows into unemployment and the duration of the unemployment spell. The *Jobtransfer* project individuates and presents a set of instruments and models to cope with business crises and labour redundancy. Such measures should reduce lay-offs and unemployment duration without hindering firms' competitiveness. Three groups of instruments are identified by the research:

*In-house measures*, carried out within firms by internal actors in cases of company restructuring without important reduction of personnel;

*Job transfer models*, to cope in cases of unavoidable dismissals, are aimed at supporting dismissed workers in finding a new job in the outside market. These models imply co-operation between internal and external regional actors and public institutions;

*General support instruments*, particularly relevant in cases of SME business crises. They are early warning and information systems, temporary wage compensation funds, public employment services and human resource management agencies. The increasing use by firms of external human resource management agencies emphasises the need to find and experiment models of intervention to cope with rapidly changing labour demand and quality requirements which combine the objectives of upgrading and flexibility with improved social standards for workers.

Analysis of good practices in this field, allows identification of the following success factors:

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<sup>3</sup> On this last issue, the project on *active monitoring* develops a specific methodology (and a guide) for ongoing project evaluation based on quality management approaches, aimed at project managers.

a *new partnership approach* by the social partners aimed at increasing firms' competitiveness while preserving employment security. The cases of good practices presented in the project show that the establishment of internal dialogue and a strategic partnership is usually associated with the presence of a strongly organised and well qualified workforce;

*coherence and co-ordination between labour market and economic policies and among internal and external actors and institutions.* A successful procedure is represented by the German establishment of a "Steering Committee for structural change and employment" which operates at regional level and has sufficient decision-making power, know-how and budget to be flexible and successful in answering different needs and crisis situations. Such regional agencies are particularly relevant in coping with SME's business crises;

The presence of a *favourable legal environment and availability of adequate labour market support instruments* and wage subsidies designed so as to motivate participation in activating and outplacement measures. The legal and policy environment should favour an early identification of firms need for change; encourage relevant actors to include employment among business strategies; promote partnership and social dialogue within firms;

*early monitoring and labour market forecasting* at the local level, in order to diffuse early warning systems;

use of *the company and other actors' networks* in order to connect the unemployed with labour demand;

develop *specific transfer models for SME* which take into consideration their structural and financial characteristics.

### **3.2. TRANSITION FROM PASSIVE TO ACTIVE MEASURES**

Activation is another important element in the employability strategy. Two aspects are considered here: on the one hand the need to induce and help the unemployed to search actively for jobs; on the other, the need to shift spending from passive to active measures.

The activation of private social protection institutions and funds to promote employability through the provision of employment incentives and active labour

market policies is considered in the project on the *Contribution of mutual and bilateral social protection to employment and employability.* According to the authors' conclusions the potential role of private social protection institutions in this area is relevant for the following reasons:

These institutions are usually very close to the unemployed and to those out of the labour force and may therefore be more sensitive to individually targeted employment actions at the local level; in addition they usually have long-term commitments with local communities;

They are more flexible in answering changing needs (such as irregular employment, ageing population and needs for personal services) than public institutions;

Their role is going to increase with more stringent constraints on public spending.

The survey of best practices conducted by the project shows that these institutions still give little attention to the promotion of employment and employability, but that their potential is high in many fields. The involvement of these institutions, in employment policies, may thus be an important way to activate social security funds: social protection funds may be used to support employment measures and local development (as the French, Italian and Portuguese experience suggests) and to support unemployment prevention (as in the Swedish and French cases). In addition the experience and skills of young early-retired workers may be used to assist the unemployed and students in job-seeking through individual counselling and guidance and support in business start-ups (as in France). Finally the changing needs linked to an ageing population together with increasing financial constraints on public social services may be dealt with by new models of social protection such as those developed recently in Germany (care insurance scheme) and in France (service voucher system).

For these reasons, the research recommendations focus on the necessity to:

Consider mutual and bilateral social protection institutions as partners in national and local employment strategies;

Integrate prevention and social rehabilitation measures with guidance and placement services for job seekers, training and business start-ups;

Combine supplementary unemployment benefits with employment services and enterprise support;

Develop new employment-friendly models of social protection and consider this an issue of the social dialogue both at national and European level.

### **3.3. ENCOURAGING A PARTNERSHIP APPROACH**

Involvement of the social partners is a relevant element in reinforcing the development of a skilled and adaptable workforce and in maintaining a market-related approach. Different types of partnerships are possible. Social partnerships among employers, trade unions and public institutions are important in the prevention of lay-offs and in the provision of active labour market policies. Local partnerships on the other hand are relevant in the provision of effective employment services. Cross-border partnerships provide support to the diffusion of experiences and good-practices and to labour mobility. All the projects, here reviewed, consider this aspect as a relevant one for an employment strategy. While the above-mentioned *Job transfer* project deals with social partnerships, two projects provide some interesting inputs in relation to local and cross-border partnerships. The project on *Capitalisation, transfer and diffusion of tools and methodologies aimed at improving local labour markets management* considers the development and implementation of local networks and partnerships; while the EGLA project on the *Development of cross-border rural labour markets in Germany and the Netherlands* addresses the issue of cross-border partnership among labour market institutions.

The main output of the first project is a guide which clearly describes how a partnership could be developed. It focuses on the expected results and the need for clear definition of roles among the project manager, the promoting agency (franchiser) and the adopting partner (franchisee); it also gives a rough estimate of the human as well as financial resources necessary to go through the project. The experience gained in the project results in a list of general recommendations for carrying out the transfer of tools and good practices. They consist in some indications to be followed in each phase of the project, from the selection of the project manager and of the best practices to the dissemination of the results. Special emphasis is given to the clear definition of the

objectives pursued by each partner involved, to the crucial role played by good and constant communication throughout the entire project and to the importance of highly skilled and trained staff.

The EGLA project is related to the implementation of cross-border partnerships in order to enhance the development of cross-border regions. The hypothesis is that there is an information deficit on cross-border markets and that strengthening existing networks and setting up new transnational networks, among public employment services, regional bodies and research institutions in rural cross-border labour markets, are important steps in improving labour market conditions and in the creation of European labour markets. In order to improve cross-border co-operation and exploit all the potential labour market opportunities of cross-border commuting it is important to improve the exchange of labour market information across borders and further develop the EURES network and its cross-border partnerships. This asks for the development of adequate technical links between different employment services, both in terms of computer systems and of administrative compatibility; improving advisory services toward new business; the further development and transfer of best practices and cross border co-operation among labour market institutions.

### **3.4. PROMOTING A LABOUR MARKET OPEN TO ALL**

This guideline, defined in Vienna, is a new one. Evidence shows that certain groups, for example, women, the disabled and ethnic minorities, suffer disproportionately from unemployment and lack of opportunity in the workplace. The scope is to promote actions for the integration in the labour market of groups and individuals experiencing difficulties in *acquiring skills* and *access* to the labour market.

Two projects deal with this issue. One is on the provision of counselling and vocational training services specifically targeted to *unemployed women aged over 40 years*, which are among the weakest groups in the labour markets due to the combination of family and labour market aspects; aspects that should be specifically addressed in the provision of employment services. The second project (*New jobs for new citizens*) provides interesting inputs relating to the labour market integration of ethnic minorities and immigrants. The

project is aimed at integrating remigrants from the former Soviet Union and Eastern Europe in the labour markets of the countries of origin (Greece, Germany and Finland). The project generates conclusions relating to the effectiveness of policies, which may be extended to measures aimed at the social and occupational integration of other immigrants and ethnic minorities.

The social integration of immigrants or ethnic minorities is easier if it is accompanied by professional integration. For this reason, employment opportunities for these target groups should be improved, giving particular attention to their specific needs and considering the culture and inclination of different backgrounds<sup>4</sup>.

Lack of language skills is often the main obstacle to occupational integration and it is usually more relevant than lack of qualifications. Since knowledge of the language is a necessary pre-requisite for integration in the host country's labour market, an improvement of (intensive) language courses for immigrants is strongly needed to help their vocational and social integration.

The social and occupational integration of immigrants is usually the task of municipalities, whose action is often limited or compromised by budget constraints and the lack of suitable political tools. The procedures for legal recognition of professional qualifications also, are often too slow and bureaucratic, hindering the integration of immigrants.

Social and personal services, and especially *neighbourhood related services*, appear to be particularly effective in providing employment opportunities for these target groups. Irregular markets and clandestine work hinders the development of regular services, due to their lower costs and prices. Under these conditions, regular employment can be created only with public support, such as labour cost reductions, tax incentives and any other form of mixed or social economy (as in the Finnish case study).

#### 4. FURTHER ACTION

The projects reviewed have provided a range of experiences and recommendations relevant to present and future work. Whereas most projects confirm the elements at the basis of the Employment Strategy, some also offer interesting elements for further development.

The key topics highlighted in the framework of this action research relate to:

the value added by European and local partnerships and networks and the development of methodologies for the identification and diffusion of best practices;

the development of individualised support based on an integrated approach to policy design aimed at preventing long term unemployment;

the activation of new institutional actors in the provision of active market policy;

the attention given to the quality of staff and management and to on-going monitoring and evaluation of results.

Naturally these projects and the topics covered are not exhaustive, with regard to the first pillar of the Guidelines, but they are relevant in providing useful input to the work of Community and National levels on these issues.

Within this framework it would be interesting to gather additional insights and examples of best practices on the following issues:

The analysis of the mainstreaming process, to improve the understanding of how good practices may be transferred to ordinary policy making;

Critical assessment of the potential effects of larger scale applications of good practices;

Developing of modes of integration among European funded projects based on a partnership and transnational aspect, in order to exchange experiences and develop a critical mass of good practices for further development;

The analysis and experimentation of preventive approaches to unemployment, of policies to ease the school to work transition and experiences in the field of continuous training and skill development for the disadvantaged.

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<sup>4</sup> For example, the project considers the case of remigrants from former Communist countries, characterised by State-planned economies, which appear to be hardly inclined to self-employment, while they are willing to accept a dependent occupation even if far below their qualifications.

**Table 1 – The main features of Action Research projects**

<b>Project</b>	<b>Objectives</b>	<b>Target population</b>	<b>Countries</b>	<b>Actors</b>	<b>Features of the project</b>
<b>The role of guidance in tackling long-term unemployment</b>	To assess the level of development of guidance services for long-term unemployed in five Member States characterised by different labour market conditions and policies.	Long-term unemployed (i.e., unemployed seeking for a job for more than 12 months)	Germany, Greece, The Netherlands, Sweden and UK	Research centres and consultancies	A common survey was carried out in each project's partners country to gather information on the main types of providers of services for LTU in each state. Those agencies indicating some aspects of their service as particularly good or innovative were visited.
<b>Network of European cities for the creation of combined information-guidance-training and placement systems</b>	To define and promote integrated employment services, providing examples on the basis of participants' experience in this field.	People with difficulties in integrating into the labour market (long term unemployed, drop-outs, women re-entering the labour market, unskilled workers, disadvantaged and handicapped people)	Germany, Italy, The Netherlands, Spain, UK	Public and private development agencies; institutions providing assistance in job seeking and in enterprise creation or supporting local firms; governmental departments.	Project's implementation based on periodic meetings, organised in two parts: in the first one, joint decisions – usually regarding project's management - were taken and guidelines for future work were defined; in the second part, national experiences on specific topics were presented and discussed. Partners' experiences were considered for the "methodological guide". Between one meeting and the other each partner worked independently following a common framework.
<b>Jobtransfers</b>	To propose a set of instruments and models, drawn from current best practices, to avoid or minimise layoffs and to reduce unemployment spells.	Restructuring enterprises; local labour market institutions and policy makers	Austria, France, Germany, Italy, The Netherlands	Public and private consulting organizations in the field of labour market and local policies; development agency; research institutes.	Selection and analysis of 15 relevant best practices implemented in specific firms to face business/employment crisis; definition of a general set of instruments and models ("in house" instruments, "job transfers models", others); discussion of intermediate results with policy makers.
<b>Contribution of mutual and bilateral social protection to employment and employability</b>	To analyse the possible role of mutual and bilateral social protection initiatives in improving employment and employability at the national and local level, through the identification of best practices in the field.	The labour force, both employed and unemployed; disadvantaged groups in the population needing care services and small enterprises	Belgium, France, Germany, Italy, Portugal, Sweden, UK	Development and research institutes; universities.	The project is based upon a recognition of mutual and bilateral social protection institutions and their policy in relation to employment and employability issues in each country. The national research and reports are based upon a common framework of analysis. Information was gathered through a postal survey and direct interviews. Results were discussed at six national seminars.

<p><b>Unemployed women aged more than 40, transnational techniques of counselling and vocational guidance.</b></p>	<p>To develop a guide on counselling and guidance for women aged more than 40 who wish to re-enter into the labour market.</p>	<p>Long-term unemployed women re-entrants in the labour markets more than 40 years of age</p>	<p>Belgium, France, Italy, Spain, UK</p>	<p>Not provided (beside the Italian institute linked to unions)</p>	<p>Analysis of different national experiences in the area of vocational guidance and counselling: the definition of a specific training model and the guide relay on the hypothesis that disadvantaged groups on the labour market might improve their position if supported by a psycho-social approach aimed at reinforcing existing competencies, self-esteem, motivation in order to develop an active, self-help attitude in front of changes in the social, labour market and personal conditions. The training model was tested during the project with class-room training and stages.</p>
<p><b>Active monitoring: from quality control to quality management</b></p>	<p>To provide a new methodology of ongoing self-evaluation</p>	<p>Project managers</p>	<p>Portugal and Germany</p>	<p>Not provided (beside the German public agency operating in the field of vocational training)</p>	<p>Provision of 2 tools: a self-evaluation guide and scientific guidance. Field-testing of these tools in some selected projects.</p>
<p><b>Capitalization, transfer and diffusion of tools and methodologies aimed at improving local labour markets management</b></p>	<p>To standardise some instruments or models already used by one of the six agencies participating in the project, favouring their diffusion first between project's partners, and then among other local agencies</p>	<p>Local agencies or administrations specialised in development and active labour market policies</p>	<p>Denmark, France, Germany, Luxembourg, Spain, UK</p>	<p>Development and counselling agencies; associations aimed at particular target groups (ex: youth, disadvantaged people, etc.)</p>	<p>The project started from the definition of six good practices that could be transferred first to the other project's partners (also through training sessions), and then outside the project. Three crucial elements of the methodology are: training, evaluation and diffusion of the results.</p>
<p><b>EGLA research group: development of cross-border rural labour markets in Germany and the Netherlands</b></p>	<p>To study cross-border labour market relations in the German-Dutch border area, cross-border co-operation in labour market administration and policy, programmes aimed at integrating ethnic minorities into the labour market and business start-ups (with relative supporting measures).</p>	<p>Low skilled immigrants and highly educated young people.</p>	<p>Germany and the Netherlands</p>	<p>Universities</p>	<p>Comparative analysis of social and economic conditions as well as institutional and policy framework in the 2 countries involved; analysis of the cross-border population attitude toward cross border mobility, carried out through a postal questionnaire sent to 5500 people in their mid thirties and living in the border region; analysis of successful business start-ups in the 2 regions.</p>
<p><b>New jobs for new citizens</b></p>	<p>Integration of remigrants from the former USSR and Eastern Europe into the labour market, mainly in the local service sectors.</p>	<p>Remigrants (mainly women) from the former Soviet Union and Eastern Europe</p>	<p>Greece, Finland and Germany</p>	<p>Association of experts in vocational training, social planning, regional development and labour market policies; development agency; university; association of municipalities.</p>	<p>In each country involved, analysis on the political aspects of relating to the integration of remigrants and of the measures implemented to support their professional and social integration; feasibility study on a local service agency in neighbourhood-related services.</p>



### III. ACTION RESEARCH PROJECT SUMMARIES

#### PROJECT NAME: ACTIVE MONITORING: FROM QUALITY CONTROL TO QUALITY MANAGEMENT

##### 1. OBJECTIVES

The primary objective of this project was to give support to project managers involved in innovative development projects under different initiatives and programmes, providing a new practical methodology of ongoing project evaluation, in order to improve the quality of their work and results.

##### 2. TARGET POPULATION

The project is addressed to project managers, mainly involved in Community Initiatives (e.g., Employment, Adapt, etc.). It is also indirectly addressed to independent evaluators and national project co-ordination structures.

According to the documentation provided, some of the local actors directly involved are: ARCIL (Lousa, Portugal), ASAS (a social action and solidarity institution in Santo Tirso, Portugal), ADCL (Guimaraes, Portugal), EGOR Management and Training, Ltd. (Lisbon, Portugal), AIP/COPRAI-Portuguese Industrial Association (Lisbon, Portugal).

In Germany the project involved ten companies of different sizes engaged in initial vocational training and life-long training programmes located in the region of Nürnberg (Northern Bavaria).

##### 3. COUNTRIES INVOLVED AND PROJECT PARTNERS

Portugal and Germany are the countries involved in the project.

The German promoter is BIBB, a governmental institute for vocational education and training. The report does not give information about the Portuguese promoter.

### 4. BACKGROUND

Recent changes in technologies and the labour market have influenced projects evaluation methods and techniques, making the “top-down, tayloristic approach” useless in post tayloristic firms demanding more responsible, decision-making employees at all levels and strengthening the importance of continually improving the quality of innovation. In fact, traditionally evaluation was seen as an external function, aimed at providing transparency in the use of public funds, measuring the results obtained in the light of top-down designed objectives, generating a general overview of the implementation of measures and gathering data for final programme evaluation in relation to the impact and value added of a particular intervention. Quantitative methods were preferred to qualitative ones and the evaluation procedures were inspired by a culture of “quality control” rather than a culture of “quality management”. This kind of evaluation is not directly involved in everyday work and is not able to produce effects in all project processes: it is an instrument more useful for top management strategy in the long-run rather than for the ordinary work of practical actors (including project managers).

### 5. FEATURES OF THE PROJECT

#### 5.1. *Methodology and tools*

The active evaluation methodology proposed is based on the systematic reintegration of evaluation (reflection) into project procedures and steps. For this reason, the first objective of the new evaluation approach is to support practical development and work (“formative” evaluation), without interfering in ongoing procedures of more classical monitoring and evaluation methods.

This kind of evaluation is typically bottom-up and appears more effective in transnational partnerships, within a “benchmarking” and “transferability” approach.

To make the theoretical principles described above operational, the project provides two concrete tools:

- a self-evaluation guide;
- scientific guidance.

The guide is designed to assist systematic and constant processes of “reflection” on the correctness and efficiency of everyday work

and steps within the project. The guide is aimed at improving project managers' skills in evaluating project results and procedures, providing, at the same time, a better informational basis for an eventual external evaluation.

Following the classical sequence of the main phases of a pilot project according to the principles of project cycle management, the complete guide is composed of 9 steps other than an introduction (problem and need analysis, objectives, indicators, work-plan and timetables, production of models and cases of good practices, practical actions, products and delivery, dissemination and mainstreaming, final evaluation). The guide's modular layout allows it to be used either sequentially (a step-by-step approach) or by directly accessing to the parts which are relevant.

Every part of the guide includes some leading questions, in order to favour active learning and stimulate individual solutions.

Scientific guidance represents a new approach to external formative and responsive evaluation. Relating to each project, its main tasks are: supporting and counselling during the development process of the project; helping to define a clear action plan and to produce some transferable results; giving feed-back to the project staff on the basis of its knowledge and experience, in order to favour eventual project changes; moderating conflicts; assisting in transfer and mainstreaming of project results; advocating common interests against individual ones.

## 5.2. Steps

The project implementation was characterised by three main steps:

*definition of the new evaluation methodology* and preparation of the methodological guide;

*field-testing* of the methodology in some selected projects, with direct visits to the projects by the scientific adviser and several contacts by phone.

*diffusion of the results* in a final seminar, in which each project team reported its judgement on four topics (advantages of the evaluation methodology, areas for improvement, resistance to use, the role of the scientific adviser).

## 6. MAIN RESULTS

The project report underlines the following strengths and weaknesses of the methodology proposed:

The self-evaluation guide was generally welcomed by project managers involved, who could see real advantages in using this methodology. In particular, it was pointed out that the guide creates a dynamic relationship between the members of the management team, making the project team perceive the same goals and reducing the probability of deviating from the planned route. In doing so, it allows greater effectiveness in the prosecution of the project objectives. Using the guide in self-evaluation processes also helps available data gathering in a systematic way, at the same time providing constant information on work in progress.

Project managers also pointed out some aspects of the guide that could be improved further. In particular the methodology was judged too time consuming, with some indicators sometimes hard to apply in every project context. The language used is too specific ("managerial driven"), not adaptable to every kind of project (social, managerial, etc.). Moreover, being a change supporting document, the use of the guide requires participative involvement of the institution promoting the project.

The introduction of the new methodology also encountered some resistance, mainly from managers who adopt very centralised project management procedures and project managers without self-discipline. The methodology can also generate tension between the project manager approach and the traditional management culture of the organisation. Finally, some resistance could derive from the difficulty of measuring the benefits of the methodology immediately.

Project managers outlined the positive role of scientific advisers in giving external help in the project evaluation/reflection process, when external experts followed the project from the beginning to its end. The systematic presence of the scientific adviser also helped to ensure that the process went forward as planned.

**PROJECT NAME:  
CAPITALIZATION, TRANSFER AND  
DIFFUSION OF TOOLS AND  
METHODOLOGIES AIMED AT  
IMPROVING LOCAL LABOUR  
MARKET MANAGEMENT**

**1. OBJECTIVES**

The threefold objective pursued by the project is:

to define (standardise) at least four instruments or models already used by one of the six agencies participating in the project to support disadvantaged groups in local labour markets;

to favour the diffusion of the models defined between the partners of the project, paying particular attention to the features of the transfer process;

to promote the use of those models by other local agencies or administrations outside the project.

**2. TARGET POPULATION**

The project mainly addresses at local agencies or administrations specialised in development and active labour market policies.

The final (indirect) target population are all the people to whom the services of local agencies are addressed, such as the long term unemployed, young jobseekers or, more generally, any particularly disadvantaged group on local labour markets.

**3. COUNTRIES INVOLVED AND  
PROJECT PARTNERS**

Denmark, France, Germany, Luxembourg, Spain, United Kingdom.

The project was carried out by two consultant experts together with six European Agencies specialised in labour market and development issues at local level.

Project leaders and co-ordinators were the consultants H. Le Marois (Espace Inter Initiative, France) and C. Le Dantec.

The agencies involved were:

Drumchapel Opportunity (UK), development agency in Glasgow

Lan Ekintza – Bilbao (ES), training, development and job creation agency

Henneberg Duus Consult (DK), counselling agency specialised in the field of teaching “life skills”

Gagner (FR), agency responsible for the “Local Economic Insertion Programme” (PLIE) in Roubaix

Förderwerk (D), German association supporting the integration in the labour market of disadvantaged people

Action Sociale pour Jeunes (L), association aimed at fighting youth unemployment and exclusion, above all of disadvantaged job-seekers.

**4. BACKGROUND**

The actual project started from the output of a previous action financed by the European Commission in 1995. In that project the same six local agencies listed above, with the help and co-ordination of Espace Inter Initiative (E2i), shared their most successful experiences of integrating disadvantaged people in local labour markets. Given the existence of very different good practices in different countries, the same partners felt the necessity to define some generalised models, so that they could be used by other agencies and local actors. The second project was inspired by this need.

**5. FEATURES OF THE PROJECT**

**5.1. Methodology and tools**

The project adopted a theoretical (“desk”) as well as practical (“field”) approach. The project started from the definition of the good practices that could be transferred first among the project partners, then outside the project. Three crucial elements of the methodology are training, evaluation and diffusion of the results.

The implementation was based on a bottom-up approach, with direct involvement of each partner, each of which was, both, proposer as well as user of different tools.

**5.2. Steps**

Since the actual project is the “second phase” of a broader research-action started in 1995, some essential steps were implemented in the first project. In particular, the identification

and selection of the case studies was done in the previous project and therefore this is not directly addressed in the present one. Some details about the previous steps (for instance, the set of criteria used – or to be used – to

select best practices) are nonetheless described in the methodological guide provided by the project.

The following table presents the steps actually followed by the project.

**Table 1 – Main steps of the project**

<b>Step</b>	<b>Features</b>	<b>Output and/or notes</b>
<i>1) Description of the instruments</i>	Six tools previously chosen were defined (“modelised”) in written documents according to a common outline.	Written documents (translated into several languages) on the following tools: instruments to create jobs in underprivileged areas (UK); “Self Employment” package addressed to all unemployed willing to create their own job (ES); the so called “production schools” and the educational methods for acquiring “life skills” (DK); a tool favouring the access to employment of the long-term unemployed (FR); the “Structure for insertion through the economy” for the long-term unemployed (D); integrated professional insertion itineraries for young job-seekers (L)
<i>2) Transfer among the six agencies</i>		Note: This phase was facilitated by the fact that the agencies had already visited each other in the previous project
<i>2a) Training</i>	Agencies wishing to learn how to use all or part of a tool – the so called “franchisees” – studied the corresponding document and then sent some of their members to a specific “training” session.	Training sessions, lasting from 1 to 3 days, organised and managed by the agency proposing the tool (the so called “franchisor”).
<i>2b) Appropriation – adaptation</i>	Franchisees actually adopted the tools they had chosen, with the help of the relevant franchisor and project’s consultant experts.	Note: owing to the necessity for further feasibility studies, special permission by the agencies’ boards of directors or extra investment by the adopting agencies, the adaptation process lasted several months, in some cases up to one year.
<i>3) Evaluation</i>	The two consultant experts visited each agency in order to evaluate the direct results of the research-action according to the following aspects: initial objectives, development of the project, obstacles or problems and corresponding solutions, main results, role of technical assistance and recommendations.	The results of the evaluation process are presented in a chapter of the final report.
<i>Dissemination:</i>	Diffusion of the results of the projects	A seminar and the publication of a methodological guide.
<i>From step 2 to step 4: promotion and communication</i>	Communication has received particular attention throughout the project.	Documents produced and promptly diffused in different terms (articles, abstracts, brochures, etc.) and available in different places (EU offices, national organisations and local centres, including the six agencies participating in the project).

## Main results

According to the information available in May 1998, about 14 months after the beginning of the research-action, ten tools (or part of them) had been transferred or were to be transferred.

Other than these quantitative results, the action had a “qualitative” impact on the agencies, because it helped to enhance the professional skills of their workers by qualifying some practices already in use or influencing agency strategies. The action also allowed stable and fruitful partnerships to be created, favouring the continuation of transnational exchanges after the project expiration.

The Seminar held in March 1998 demonstrated that there is great interest in this kind of action: 146 members of 91 organisations from 14 European countries attended. Almost all the 49 participating organisations that completed in the evaluation form at the end of the seminar expressed their intention to use one of the tools presented, while 32 of them wished to join a European network of organisations fighting exclusion and unemployment. The final output of the project was a “Methodological guide for the transfer of tools and good practices”, which is structured in seven phases: the identification of a restricted number of tools across Europe, the selection of good practices, the definition of generalised models, the training process, the appropriation-adaptation of the models to local contexts, the diffusion and the evaluation of the results. For each phase the main objectives, the recommended method or process and the expected results are presented. The guide specifies the human as well as the financial resources that are necessary to carry out the project. In particular, it clearly describes the role and desirable skills of the project manager, the franchisor and the franchisees: it also gives a rough estimation of monetary costs in each phase of the project.

The experience gained in the project also inspired a list of *general recommendations* for the transfer of tools and good practices. They include guidelines to be followed in each phase of the project, from the selection of the project manager and of the best practices to the dissemination of the results. Special emphasis is given to the clear definition of the objectives pursued by each partner involved and to the crucial role played by good and constant communication throughout the entire project. These recommendations can be summarised as follows:

The project leader should be selected according to his/her skills in relation to the main objectives of the project;

The necessary time should be taken to properly assess the feasibility and transferability of the tools selected;

Each actor/agency involved, above all those who intend to adopt a particular tool (the so called franchisees), should already have clearly defined their objectives. It would be useful for similar agencies with common interests to work together;

An official contract should lay down the relationship (in terms of tasks, roles, responsibilities, etc.) between the project leader and other project participants: each role has to be defined at the beginning of the project;

To be effectively transferable, the relevant aspects of each tool should be described with enough details in written documents which are contained in the “methodological guide” which can be used by everyone wishing to adopt one of these tools;

Training can only start once each trainee has already read the written document concerning a certain tool and knows its general features;

The training sessions should be based on a “how to do” approach and concrete experiences, without neglecting general questions and interpersonal relationships: the latter represent a basic element for successful and durable partnerships;

Counselling and technical assistance have to be constantly available during the phase of appropriation-adaptation;

The final seminar must favour the diffusion of each tool directly by each agency. In this perspective, thematic workshops for a limited number of participants and “meeting points” could be particularly effective;

There should be no attempt to economise on those elements that can improve communication and diffusion of the results: secretaries, translations, brochures, etc.

**PROJECT NAME:  
CONTRIBUTION OF MUTUAL AND  
BILATERAL SOCIAL PROTECTION  
TO EMPLOYMENT AND  
EMPLOYABILITY**

**1. OBJECTIVES**

The project's aim is to analyse how *mutual and bilateral social protection* institutions<sup>5</sup> may affect employment creation and employability at the national and local level, through the identification of best practices in the field.

An additional objective, which has been achieved according to the promoters, was to involve the institutions analysed in the process so as to make them reconsider their actions in order to improve employability and create employment.

Only mutual and bilateral social protection institutions were considered for the following reasons:

Because they are closer to beneficiaries and may be thus more sensible to individually targeted employment actions at the local level

Because they are independent from the State and more flexible in answering changing needs (such as irregular employment, ageing population and needs of personal services)

Because they have long-term commitments with local communities

Because their role will increase with more stringent constraints on public spending.

**2. TARGET POPULATION**

The project is addressed to the employed and the unemployed; to disadvantaged groups in

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<sup>5</sup> "Bilateral" social protection systems are jointly managed by social partners. They can be based either on collective agreements (e.g., France, Italy, Sweden and UK) or on a mission given to the social partners within the framework of the principle of self-management (e.g., Germany). The bilateral system can provide both compulsory and supplementary benefits. "Mutual" social protection institutions are democratically managed by insured workers, in the spirit of self-help and solidarity of its members. They can also be commissioned by the legislator to provide compulsory social benefits (as in the case of health insurance in Belgium and in specific sectors in France).

the population needing care services and small enterprises.

**3. COUNTRIES INVOLVED AND  
PROJECT PARTNERS**

Seven European countries were involved in the project: Belgium, France, Germany, Italy, Portugal, Sweden, United Kingdom.

The work was co-ordinated by KOOPi, the Swedish Co-operative Development and Research Institute, in collaboration with IPSE (Institut de la Protection Sociale Europeenne) and in partnership with the Max Planck Institut, Munich; Monitorlavoro, Rome; Uniao das Mutualidades Portugesas, Lisbon; and Westminster University London. The Portuguese, French and Italian partners have direct and close links with bilateral and mutual insurance and social protection, being either mutual institutions or umbrella organisations of such institutions; the Belgian, United Kingdom and German partners are experts in the area of social protection from universities and research institutions. The co-ordinating institute, KOOPi has indirect links with some of the bilateral social protection institutions.

**4. FEATURES OF THE PROJECT**

**4.1. Methodology and tools**

The project is based upon a recognition of mutual and bilateral social protection institutions and their policy in relation to employment and employability issues in each country.

The national research and reports are based upon a common framework of analysis developed at an earlier stage among the partners, when target groups and branches of social protection to be covered were defined.

Information necessary to identify best practices and constraints on employment based policies among social protection institutions at country level, were gathered through a postal survey and direct interviews.

Six national seminars were then organised to discuss national reports with the aim of involving social protection institutions and other actors and disseminating the main results.

In order to disseminate results, it is also expected that the research will be followed by

activities organised by the partners in Sweden, France and Italy.

The report is also available on the Internet.

## 5. MAIN RESULTS

The analysis of mutual and bilateral institutions showed that generally they do not have the promotion of employment and employability among their aims. However, interesting examples of best practices in terms of both employment creation and employability were found during the research which have interesting potential and need to be disseminated at European level.

*Recommendations* may be summarised in the following way:

Mutual and bilateral social protection institutions should propose themselves as partners of national employment strategies;

Prevention and rehabilitation measures must be integrated with guidance and placement for job-seekers, training and support for business start ups

Supplementary unemployment benefits must be combined with employment services and enterprise support

New employment-friendly models of social protection should be developed, and this should be an issue for social dialogue both at national and European levels.

*Actions taken* by mutual and bilateral institutions have been classified in the following categories and about 20 cases of best practices have been reported (see Table 1):

Participation in national employment policy

Employability (including prevention, rehabilitation, training and employment services)

Combined funds for employment and social protection

Construction industry benefits for irregular employment

New modes of social protection insurance and benefits

Local development (including actions to support SMEs and the social economy)

Pension/social protection institutions and their investment policy.

The diffusion of best practices according to these categories is linked to the different structure of social protection systems in

European countries and their legislation. While in Belgium, France and Germany mutual and bilateral social protection is compulsory and very significant, in other countries it is supplementary to the state controlled system. Only in Sweden and the UK bilateral and mutual institutions dispose of large funds.

Best practices examples of *participation in national employment policies* are found in Portugal and France, where national mutual organisations are partners in government employment policies.

In Portugal UMP is engaged in promoting the social labour market and social solidarity pact in order to integrate the unemployed through exploiting new employment areas such as: personal and family services, educational services and preservation of national and cultural heritage. Portuguese mutuals have been running economic activities with social objectives for a long time, including child care, assistance to elderly people, health care, pharmacies and vocational training projects.

In France FNMF participates in a three year government programme to create jobs for young people (New services, New jobs), and has committed itself to 1000 new jobs over two years. Local mutualist associations have to devise and put together projects responding to emerging social needs. After 60 months, the French Mutualité will have to find ways and means to maintain the activities and jobs created within this agreement.

**Table 1 - Actions taken by mutual and bilateral social protection organisations and examples of best practices**

	<b>Best practices</b>	<b>Features related to employment and employability</b>
Participation in national employment policies	Portugal (UMP)	Mutual organisations have been running economic activities with social objectives for a long time, including child care, assistance to old people, health care, pharmacies and vocational training projects.
	France (FNFM)	Participation in a government programme to create jobs for young people, committing itself to 1000 new jobs over two years. Local organisations have to put together projects responding to emerging social needs
Employability (including prevention, rehabilitation, training and employment services)	Germany (Industrial Injury System, BG)	Provision of individual guidance, training, support for business start-ups, re-adaptation of workplace and wage subsidies for disabled people
	Belgium	Integration of women, youth and handicapped in the labour market through training, the creation of associations of unemployed, family care services for job-seeking women
	Sweden	Preventive measure and rehabilitation, personnel and health management (new costs-benefits procedures)
	France (First Job Workshops; Filiere Service Emploi)	Support to unemployed and students in jobseeking through individual counselling, guidance and support for business start-ups. Supplementary contributions to unemployed and counselling for redundant workers.
Combined funds for employment and social protection	Italy (craft industry in Veneto and Emilia Romagna)	Funds used to pay unemployment, sickness and injury benefits, but also to subsidise professional training, SMEs' investments and employment services
	Sweden (bilateral funds for white and blue collars)	Mix of supplementary unemployment benefits, employment services and advice to individuals at risk of unemployment
Construction industry benefits for irregular employment	Most European countries	Employability schemes, such as seniority bonuses, training and education funds, safety support funds.
	Ireland and Italy	Monitoring of irregular working conditions and fiscal or social contribution evasion.
New models of social protection	Germany (care insurance scheme)	People requiring care get an allowance differentiated according to their needs (to buy services either provided at home, in day-centres or in care institutions)
	France (service voucher system)	Combination of private and public funds to convert latent needs into resolvable demand.
Local development initiatives	Portugal	Direct management of employment creation activities (health centres and pharmacies, home assistance and child care services, training measures)
	France (Cape and Capimtec pension funds)	Integration of the unemployed in the local development of new jobs in partnership with local enterprises. Provision of services to enterprises. Active support for business start-ups and to the unemployed in searching for a job.
Capital investment policy (least developed action)	Sweden (insurance companies from collective agreements)	Generally they have no strategic investment policy relating to employment and job creation. Recently, three trade union federations have invested to encourage industrial development and stimulate employment growth.
	Italy (bilateral regional or sector funds)	In the near future it is expected that they will provide firms with new medium-long term capital.
	Portugal	In co-operation with a national bank, financing of housing and small enterprises creation. Recently funds targeted on education, training and investment subsidies.
	U.K.	Focus on ethical dimension of investment by pension funds.



*Employability* best practices have been found in Germany, Belgium, Sweden and France. The bilateral German Industrial Injury System (BG) is very comprehensive: measures to improve employability include individual guidance, training and support for business start-ups. In 1997 over 230.000 people were involved in rehabilitation measures, of whom nearly 4.000 participated in training courses. The system also includes the possibility of having a person (case manager), accompany an individual from the moment he/she is hospitalised until he/she is back at work.

In addition the German bilateral pension system pays for training, adaptation of workplaces and wage subsidies for the less able to work on the basis of a "rehabilitation before pension" principle, in order to avoid early retirement.

Belgian mutual institutions present interesting practices for the integration of women, youth and handicapped in the labour market. The main objective of Belgian mutuals is health protection, but their initiatives, taken together with voluntary associations, are promoting directly and indirectly employability through training, the creation of associations of unemployed (club de chômeurs) and the provision of family care services to support job-seeking women.

The Swedish institutions have been mainly involved in analysis and research on rehabilitation, but recently have increasingly realised results in the field of preventive measures and rehabilitation and of personnel and health management, in order to develop new cost-benefits procedures by which health and risk factors are directly incorporated in the budgetary calculations.

In France many of the supplementary pension funds are used at regional level by voluntary associations of early retirees to assist the unemployed and students in job-seeking through individual counselling and guidance and support to business start-ups. Other French experiences involve "First Jobs workshops" operating since 1995 aimed at young first job seekers and involving individual counselling; "Filière Service Emploi", which provides supplementary contributions to the unemployed, counselling for redundant workers, help in business start ups.

In the field of *combined funds for employment and social protection*, best practices examples have been found in Sweden and Italy. Bilateral institutions in this field are usually the expression of collective agreements and their activities are tailored to the needs of the

workers and companies involved. Both employers and workers are beneficiaries. The Italian bilateral institutions considered in the project operate in the craft industry in Veneto and Emilia Romagna. Their funds pay unemployment, sickness and industrial injury benefits, but also subsidise professional training, SMEs investments and employment services. Their role is considered important in the development of the small enterprise sector in the Italian North-East. In 1996 the Emilia Romagna fund contributed 5 million ecus to over 3.000 firms. The Italian model is considered a possible instrument in an increasingly flexible labour market with growing seasonal and irregular employment and high labour mobility. It is particularly interesting for sectors such as construction, commerce and tourism.

The Swedish bilateral funds for white and blue collar workers provide a mix of supplementary unemployment benefits, employment services (mainly professional training) and advice to individuals at risk of unemployment. Services are also aimed at companies, through the creation of inter-company networks, support to organisational change, help in the setting up of companies, product development and marketing and human resources development. Results appear very good, with between 60% and 70% of the unemployed reemployed and around 10.000 new enterprises supported. However it should be noted that these results are linked to the highly skilled target groups involved. Also the blue-collar funds are however going to be dismantled by the end of 1999, as a result of the withdrawal of the employers' organisation which argues that financial support to individual companies is an obstacle to free competition.

The *construction industry bilateral funds* are another example of social protection for irregular employment, this sector being characterised by large fluctuations in employment, frequent changes of employer and a scattered firm structure. Collective agreements in order to set up bilateral funds may be found in most European countries and these funds cover millions of workers. The funds have been divided into those related to general working conditions (mainly bad weather schemes, holiday schemes, unemployment supplements), those providing supplement to the state system (mainly sickness supplements, pensions funds and early retirement benefits, disability and accidents benefits) and miscellaneous schemes. The latter often include employability schemes, such as seniority bonuses (to support

employment stability), training and education funds, safety support funds. More rare are monitoring agencies which monitor irregular working conditions and fiscal or contributive evasion (in Ireland, Italy). The main driving force for such agreements has been the pressure of social dumping. Most funds, however, do not extend their activities toward more active measures such as the provision of rehabilitation centres, long-term care arrangements, better safety and training coverage.

Changing needs linked to an ageing population together with increasing financial constraints on public social services, call for *new models of social protection*. Germany and France provide some examples of best practices in this field. The recently introduced German care insurance scheme was introduced in 1995 as a separate scheme within the bilateral health insurance. People needing care get an allowance differentiated according to needs which may be used to buy services either provided at home, in day-centres or in care institutions. This measure was financed by reducing holiday hours. According to government estimates these measures contributed to the creation of at least 75,000 new jobs in a year and a half, most were female (75%) and part time jobs created in home services and day/short term care. Services are mainly provided by voluntary associations (55%) or small private enterprises (40%). Discussions are now focussed on working conditions and wages, which are usually not regulated in order to keep costs low. After the initial boom, demand is now sluggish and sector rationalisation is needed.

The French service voucher system is another interesting example of the combination of private and public financial resources in order to convert latent needs into solvable demand. This measure brings together the user, the approved service provider, the employer of service providers and the third party payer (which could be a mutual or bilateral institution). To be approved, service providers and professionals have to conform to specific financial and quality criteria.

Many of the good practices considered in the project are linked to *local development initiatives*, especially in the case of mutuals. The local mutual social protection institutions in Portugal have been managing employment creation activities for a long time: they have been creating their own health centres and pharmacies, home assistance and child care services, training initiatives for women and young people that lead to enterprise creation.

Recent initiatives, in collaboration with the Portuguese Industrial Association, are aimed at training managers for the development of social services, small enterprises at local level and intermediary enterprises.

The *Cape* experience in Northern France aims at the integration of the unemployed in the local development of new jobs in partnership with local enterprises. Cape tries to match the needs for temporary work or outsourcing of local firms with the competencies of unemployed Cape members. It also created a services enterprise which offers consulting and training services adapted to SMEs all over France and an association oriented toward enterprise creation.

*Capimtec* is another French pension fund for white collar staff in the metal and engineering sectors, whose members assist small enterprises and associations, help business start-ups at the local level and assist the unemployed in their job search.

*Capital investment policy* is another important (perhaps the most important) potential area for employment creation by pension funds. Research however showed that legislation restrictions, the prudent attitude of fund managers and the small size of pension funds in most countries limited this possibility. However, debate is increasing both in Member States and at European level over the need to include job-creation among fund management objectives and, hence, the possibility that part of the funds may be oriented toward non-quoted shares in order to create employment.

Good practices may be found in Sweden, Italy, Portugal and France. Sweden, with Great Britain, is one of the European countries where pensions funds are sufficiently large and based on the capitalisation principle. Swedish insurance companies arising from collective agreements are among the most relevant institutional investors on the Stockholm stock exchange, but they have no strategic investment policy relating to employment and job creation. In recent times, as a result of this research- action project, three trade union federations have set aside part of their funds to encourage industrial development and stimulate employment growth. Investments will involve SMEs without a rating on the stock exchange.

Italian bilateral funds have only been operating since 1995: estimates are that they will increase over the next 10 years to almost 20 billion Ecus and this will positively affect the Italian capital market providing firms with new medium-long term capital. Currently, the lack

of clear legislation has blocked their development and there is a debate as to whether the funds should be national, regional or company based. Up to now pension funds have been set up by collective agreements only in the chemical and metalworking sector, while regional funds are being created in some Northern regions.

In Portugal the largest mutual association has established a bank with a nation-wide network. It mainly finances housing and small enterprises in the construction, service and commercial sectors. In 1997 the mutual also created a foundation whose capital is targeted on education, training and investment subsidies.

In Britain the focus is on the ethical dimension of investments by pension funds.

**PROJECT NAME:  
EGLA RESEARCH GROUP/  
DEVELOPMENT OF CROSS-  
BORDER RURAL LABOUR  
MARKETS IN GERMANY AND THE  
NETHERLANDS**

## **1. OBJECTIVES**

Research was aimed at studying:

Cross-border labour market relations in the German-Dutch border area

Cross-border co-operation in labour market administration and policy

Programmes aimed at integrating ethnic minorities into the labour market

Business start-ups in Germany and the Netherlands and programmes supporting business start-ups in the two countries.

The hypothesis is that there is an information deficit on such issues and that strengthening existing networks and setting up new transnational networks among public employment services, regional bodies and research institutions in rural cross-border labour markets is an important step in improving labour market conditions in rural cross-border regions and in the creation of European Labour markets.

More specifically the questions considered by the project were:

To what extent is there a cross-border jobs market in the German-Dutch border region?

What factors are perceived by the population of the border region as obstacles to the development of a cross-border jobs market and how willing is this population to seek work across the border?

To what extent EURES (European Employment Services)<sup>6</sup> is already used in the procurement of cross-border information?

What factors influence people's attitude toward cross-border mobility and how these factors differ between Germany and the Netherlands?

To what extent do public employment services on either side of the border co-ordinate their

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<sup>6</sup> Eures is a network of employment services and other partners which provide information and advice for migrant workers and cross-border commuters.

activity and to what extent does this co-ordination improve cross-border labour market relations?

How can public employment services support the process of cross-border exchange?

## **2. TARGET POPULATION**

Target population comprises highly educated young people<sup>7</sup> and low skilled immigrants.

In relation to these target groups, the project aimed at answering the following questions:

What are problems common to the low skilled immigrants on both sides of the border and to what extent co-operation measures and networks may improve the situation of these target groups? How can public employment services and local actors benefit from best-practices experience in terms of active labour market policies toward low skilled immigrants on both sides of the border?

What are the determinants of cross-

border mobility for highly skilled individuals and what policies may be adopted to avoid brain drain trends from less developed cross-border regions?

What is the scale of business start-ups by highly skilled individuals in the two countries and what are their effects on the economy?

To what extent can border regions benefit from new business? How is the specific advisory and support service available in the two countries affecting business start-ups?

## **3. COUNTRIES INVOLVED AND PROJECT PARTNERS**

The project involved the cross-border regions between Germany and The Netherlands. It was carried out by the Universities of Osnabruck and Maastricht.

## **4. FEATURES OF THE PROJECT**

### ***4.1. Methodology and tools***

The project involved the comparative analysis of cross-border labour markets and target population:

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<sup>7</sup> Secondary education qualifications: Abitur in Germany and VWO in the Netherlands.

1. the comparative analysis of the local social and economic conditions,
2. the comparative analysis of institutional and policy frameworks in the two countries involved with special attention toward active labour market and immigration policies and policies to support business start-ups,
3. the analysis of the cross-border population's attitude toward cross border mobility, carried out through a postal questionnaire sent to 5500 people in the border region who took their school-leaving examination in 1982-83 and were at the time of the survey in their mid thirties. This young, generally highly educated population is considered the most mobile group in the labour market. The answer rate was 40% (2200 answers), of which 52% German and 48% Dutch, equally divided by gender. Attitude to mobility was analysed through a statistical logistic model on the basis of individual, regional and cross border factor, and
4. the analysis of successful business start-ups in the two regions.

Five joint meetings and workshops were held to improve reciprocal understanding.

## 5. MAIN RESULTS

Cross-border commuting concerns a small percentage of the working population in the EU (0.26%). Its expansion could be important for the economic development of rural cross-border regions, because it could reduce the brain drain due to migration of the highly skilled out of rural regions, and foster more intensive capitalisation of the effects of cross-border co-operation.

*Analysis of survey results* on cross-border young and relatively highly educated population attitudes showed that in the case of Dutch-German cross border region the cross-border labour markets are perceived as clearly separated by the national frontier. Only 1% of survey respondents live and work in the neighbouring country, a further 0.5% commute daily to the other country, but 12% of Germans and 14% of the Dutch commuted a distance more than 50 KM within their own country for work and over half of the respondents had moved from one region to another within their home country for work purposes and were more than 50 km away from their region of origin. Dutch respondents were more mobile

than the Germans and had spent long periods of training or work in Germany.

The most relevant perceived obstacles to cross-border mobility are, according to the interviewed:

*Lack of, or difficulty in obtaining information on cross-border labour markets* was considered by most respondents as the most relevant obstacle to cross-border mobility (42% of answers). This view was held by both people who had spent some time in the neighbouring country and people who had never crossed the border. Main information sources are represented by newspapers (65%), own firm (about 17%) and private contacts (about 16%). EURES and other employment agencies were cited by about 9% of respondents. These agencies are particularly important for the less educated and skilled groups.

*Inadequate knowledge of the language* with 19% of responses was the second biggest perceived difficulty.

*Cultural differences and prejudices* were cited by 20% of all those questioned. The percentage doubled for Germans already living in the Netherlands.

*Differences in social security and taxation systems and problems in recognition of educational and professional qualifications*, which are considered the main obstacles to cross-border mobility by the Commission White Paper, were seen as less relevant by the German respondents. Differences in social security and tax systems were considered relevant by a larger proportion of Dutch who had never spent time in Germany. On the other hand, recognition of qualifications was considered an important obstacle by Dutch people who had spent some time in Germany.

Employers too saw legal factors and differences in social security and taxation systems as a lesser problem than language knowledge.

Interest in information on cross-border labour markets is low. Only 6% of the interviewed on both sides kept themselves informed about the jobs on the other side of the border and employers usually do not look for labour across the border. Populations in rural regions show significantly lower interest than those in regions that include towns on at least one side of the border.

25% of the interviewed expressed willingness to commute, with higher percentages for the unemployed and those undergoing training.

Willingness to move is higher among university graduates (30% against 17% of those with lower educational levels) and among those who had already spent some time in the other country.

Attitude to mobility was analysed through a statistical logistic model: individual factors affecting in general the propensity to move, either in the home country or abroad were relevant for people of both countries (such as property ownership, marital status, skill level, position in the labour market). Regional factors (regional unemployment, average earnings and population density) are far less relevant. The existence of contacts across the border is particularly important in increasing the willingness to move. Perception of prejudices is relevant in explaining Dutch respondent willingness to move, while the perception of problems related to access to information and difficulties relating to social security and tax systems are significant only for the Germans. Other perceived obstacles have a similar effect on both nationalities. Gender attitudes to mobility are different across the two nationalities: while in men willingness to move is similar (30% of German men and 25% of Dutch men), Dutch women are less willing than German women to move for a good job in the other country (2.6% Dutch women against 10% German women would be willing to move).

#### ***Analysis of labour market institutions and policy***

There were frequent problems in the exchange of information about labour market vacancies between labour market administrations. These are due to the differences in administrative structures in the two countries and to the difficulties of setting up links among computer systems and data processing systems, as the EURES experience has also shown. The automatic exchange of information on "European" job vacancies between Germany and the Netherlands is working in the EURES European-wide network, but the complete information exchange of job vacancies in the German-Dutch border regions is only in preparation. Nevertheless, vacancies of the employment services concerned are available on Internet websites.

Analysis of the two countries' labour policies and institutional setting show wide differences and different results, but there is little exchange of experiences and good practices across the border. One case is the Rhine-Ems-Ijssel Euregio and the EURES cross-border

partnership "Euregio Groma/Enschede", where regular meetings are held between representatives of job placement, the Euro-advisers of the EURES network and advisory agencies, but where continuous pooling of knowledge gained from day-to-day work is still in development. In this case the EGLA project brought together relevant experts from employment services, political bodies and independent operators and institutions.

#### ***Analysis of business start-ups***

12% of the highly skilled persons surveyed were self-employed at the time of the survey in both countries. Gender differences were higher in Germany (16% men and 8.4% women) than in the Netherlands (12.4 % and 12% respectively). Self-employment was more diffused among graduates. New businesses employ on average 3.5 people, including the respondent, and successful businesses are clustered mainly in service industries (marketing, advertising and consultancy). Around 2/3 of the self-employed respondents had previous dependent employment experiences, usually in the same sector and location.

Location of business start-ups is thus linked to the region where the entrepreneur first worked. This is particularly problematic for border regions with poor labour markets, because it means that a vicious circle is set up with potential entrepreneurs starting their own business in other regions and reinforcing existing disparities between regional labour markets. Moreover in border regions it is more frequent that business are taken over, are less successful and less innovative and tend to create fewer jobs.

Government support to business start-ups reaches only a minority of new business. Fewer than 10% of the self-employed responding to the survey took advantage of financial support programmes. In Germany advisory services were used only by 20% of the people starting new businesses as compared to 40% of their Dutch counterparts. The most used support programmes in Germany were special start-up loans for long-term capital at favourable interest rates, while Dutch new business mainly used the PBTS technology programme, MUB and *Startende Ondernemers* for SMEs and new business. Important advice institutions are chambers of commerce, followed by banks, tax advisers and financial services providers, associations and business consultants.

Dynamic businesses were more diffused and death rates were lower in the Netherlands than

in Germany, owing to the more favourable economic climate. It is not clear how much the better results of the Netherlands are due to differences in support and advice programmes. It did however emerge that Dutch start-ups received advice far more often than German ones.

### ***Results for low skilled immigrants***

While German legislation does not make any specific provision for supporting and integrating immigrants and most labour administrations are not adequately staffed to provide integration measures, in The Netherlands policies aimed at integrating immigrants (especially the less skilled non-EU nationals) are more diffused and public employment authorities co-operate with ethnic networks, trade unions, employers and universities in order to develop innovative measures. Nonetheless, the unemployment rate for immigrants is higher in The Netherlands than in Germany, due in part to the structural segmentation in the labour market.

There is little occasional exchange of experience between the German and Dutch border regions on such issues. The EGLA project contributed to bring together specialists from both countries and to build up a network of experts from labour administrations, political bodies and independent operators and institutions.

### ***Recommendations***

In order to improve cross-border co-operation and to exploit all the potential labour market opportunities of cross-border commuting the research team suggests:

Improving the exchange of labour market information across borders and further develop the EURES network, mainly its cross-border partnerships. In this case adequate technical links between different employment services must be improved, for example by using much more intensively the common computer system and administrative compatibilities.

Improving advisory services toward new business, especially in Germany

Developing further and transferring best practices and cross border co-operation among labour market institutions. For example, Germany might benefit from the innovative approach to integrating ethnic minorities and to migration and labour policies followed in the Netherlands.

## **PROJECT NAME: JOBTRANSFER**

### **1. OBJECTIVES**

The primary objective of the project is to develop a set of instruments and company based labour market interventions to avoid or minimise lay-offs in European firms and to reduce the duration of unemployment. Priority is given to ensuring employability and (re)placement in acceptable jobs inside the firm. If lay-offs are unavoidable, the "second best" objective is to keep the period of unemployment as short as possible and to favour a smooth transfer to the outside labour market by placement into another job.

### **2. TARGET POPULATION**

Enterprises which are planning or already undergoing restructuring processes in order to avoid dismissals or to support redundant workers in finding a job outside the firm;

local labour market institutions and policy makers.

### **3. COUNTRIES INVOLVED AND PROJECT PARTNERS**

Austria, France, Germany, Italy and The Netherlands are the countries involved in the project.

Project leader and co-ordinator is the Austrian-German consortium TRAIN (OSB, Vienna; SPI, Berlin and G.I.B., North Rhine Westphalia).

OSB is an Austrian private organisation leader in the field of labour market and social policy advice.

SPI is a German foundation of the Labour Welfare Organisation (AWO), one of the seven private sector welfare organisations in the Federal Republic of Germany.

GIB is a German consultancy association working on behalf of the government of North Rhine Westphalia, specialised in mixed public-private interventions in the local labour market.

Other partners: Codex and IRES in Italy (the first is a development agency which promotes issues of local development and labour market policies in relation to European policies; the

second is a socio-economic research institute linked to CGIL, one of the main Italian trade unions); RDE in France (a private consultancy company specialised in business creation and development in support of employees of large corporations) and Activa in the Netherlands (a public-private foundation specialised in labour market research and programme development and implementation).

The project team was characterised by very different profiles in terms of organisational nature (private, public or both), field of activity (labour market and social policy, local development, business consultants, etc.) and kind of services offered (counselling, research, etc.). This diversity allowed the study to be enriched by different approaches and methodologies, covering a broad range of measures related to both company personnel management and public-private partnership solutions.

### **4. BACKGROUND**

In a context of increasing uncertainty and competitiveness owing to globalisation and structural changes in international markets, the traditional image of life-long employment in the same company has been vanishing: a number of jobs are constantly being created and destroyed, job profiles are subject to continuous transformation and specific technical knowledge rapidly becomes obsolete.

In this context, the probability of being unemployed has been increasing for most of the European workforce.

Given public fund constraints, new solutions have to be cost effective and to produce immediate results in terms of labour market reintegration. Therefore, according to the project promoters, a successful instrument or model has to be implemented in the social context of the original working place immediately after the need for restructuring is identified. Moreover, it has to concern individuals' career re-orientation, rather than simple re-qualification of employees involved. Finally, it has to be approved and managed by all the social actors involved (social partners, public institutions, other intermediate organisations, etc.).



## 5. FEATURES OF THE PROJECT

### 5.1. *Methodology and tools*

The project's main assumption is that positive solutions to crisis situations have already been developed by the management and/or work councils (with or without public support) of individual enterprises all over Europe. From these experiences some best practices might be selected in order to derive a general set of measures against redundancies and to propose a set of policy recommendations addressed to labour market institutions. The project is therefore based on a "research" approach, aimed at investigating, analysing and developing early and company-based labour market policies and programmes.

### 5.2. *Steps*

The project was implemented following three main steps:

selection and study of some relevant good solutions already implemented by a specific firm to face business/employment crises

definition of a general set of instruments and models;

discussion of intermediate results with policy makers.

#### ***1. The selection and study of 15 "good practice" cases***

The selection of the case studies was aimed at finding "innovative" solutions to business crisis or workforce restructuring. A particular solution was considered innovative if it was: (i) substantially different from more traditional lay-offs procedures (e.g., simple use of income-support measures); (ii) effective in either avoiding/reducing dismissals or facilitating smooth transfer to the outside labour market; (iii) coherent with the growing need for flexibility inside the company and (iv) considered acceptable or convenient by all actors involved. The selection of the best practices was then based on qualitative assessment rather than quantitative indicators.

A qualitative approach was also generally preferred to a quantitative one in studying all the cases selected. Statistical data and quantitative results, if available and significant, were however provided.

For each case study, the analysis was aimed at highlighting the organisational setting, the

methodology used and the steps followed to solve the problem, the main outcomes, the sources of financing, the evaluation of the actors involved, the main critical constraints and success factors.

The following table presents the fifteen cases selected and the instruments applied.

**Table 1 – Best practices selected**

<b>Case studies</b>	<b>Country</b>	<b>Applied instruments/methods</b>
VOEST Alpine Steel Works	Austria	Company labour foundation
A group of SMEs in the district of Hartberg	Austria	Regional labour foundation
Food-processing industry	Austria	Branch specific labour foundation
La Générale de Banque	Belgium	Prospective management of employment and competencies
Fonderie Bouhyer	France	Working time arrangements
ACROLOGIS (Association of 18 SMEs in food-processing and transport sector)	France	Employers' association for human resources management (training, leasing and integration of employees with low qualifications)
IBM	France	Working time arrangements Spin-offs Outsourcing
Schlafhorst AG (construction of textile machinery)	Germany	Outsourcing In-house labour market agency
Baumgarten (bankrupt engineering company)	Germany	Successor company Transfer society
MYPEGASUS (holding company)	Germany	“Safety” net for redundant workers Vocational training and job experience Outplacement
Neuss (manufacturing of agricultural machinery)	Germany	In-house labour market agency
Metal engineering company	Italy	Working time arrangements Detachment
Rubber manufacturing company	Italy	Temporary wage compensation (CIGS) Outplacement
Co-operative credit institute	Italy	Internal joint committee ( <i>comitato paritetico</i> )
Prospect Method	Netherlands	Model of regional planning and monitoring

## ***II. The definition of a generalised set of instruments and models***

Analysis of the main features of the fifteen good examples allowed the definition of a set of general “core instruments” that a firm can adopt to cope with redundancies successfully. These instruments and models can be divided into two main groups according to the timing of intervention, the main objective and the principal actors:

“in-house” instruments, which are promoted and carried out mostly inside the firm by internal actors in the case of company restructuring without large job-losses;

“jobtransfer” models, which are adopted when lay-offs are no longer avoidable in order to support each dismissed worker in his/her shift to another job in the outside market. With this kind of model an outside intervention (also by public administrations) is generally necessary.

Examples of “in-house” measures are work-time arrangements, promotion of internal mobility according to prospective management of competencies, etc.; examples of “jobtransfer” models are labour foundations, in-house labour market agencies, etc. Some measures do not belong to only one category: for instance, spin-offs or outsourcing, which are promoted by internal management as part of a long term human resource strategy, show features of both groups.

Some measures are neither “in-house”-made nor “jobtransfer” models and they can be classified into three further categories:

c1) early warning and information systems (such as the Austrian company restructuring law and the Dutch regional labour market monitoring system), which are aimed at preventing redundancies by forecasting eventual employment-business crises;

c2) instruments mainly provided by public administrations (such as temporary wage compensations and publicly funded support services), with a marginal role for firms’ intervention;

c3) models of external human resource management (such as labour market agencies of SME associations in France), to cope with ever changing labour demand combined with increasing quality requirements.

It is worth noting that most of the 15 good practices analysed have applied a mix of instruments/models to cope with business crises or workforce restructuring: hence, they do not represent the direct and practical applications of each instrument described.

The following table points out the main features of models proposed.

**Table 2 – Main features of the core instruments and models proposed**

	<b>In –house instruments</b>	<b>Jobtransfer models</b>	<b>Early warning and information systems</b>	<b>Instruments provided by public administrations</b>	<b>External personnel management</b>
<b>Examples</b>	Working time arrangements, prospective management of human resources, in-house career counselling	Labour foundations, in-house labour market agencies	Prospect method, Austrian “company restructuring law”	Temporary wage compensations, publicly funded support services, regional steering committees to improve the co-ordination of structural policies	Labour market agencies of SME association, further development of labour foundations towards personnel management agencies
<b>Moment of intervention</b>	Company crisis evident, personnel restructuring under discussion, no decision on individual dismissals	Company crisis is already a fact, social plan to be discussed	Company or sector crisis not evident, weak signals of eventual problems	Company crisis is already a fact, social plan under discussion or already established	Each time the company needs new workers, mainly for a limited period of time
<b>Objective</b>	To avoid job losses and unemployment or to keep the number of dismissals low	To reduce unemployment spells for affected workers, reorienting, retraining and transferring them to other jobs	To avoid redundancies forecasting eventual employment-business crises	To help firms in facing conjunctural crises and/or supporting affected workers in finding a new job	To cope with ever changing labour demand combined with increasing quality requirements
<b>Main actors</b>	In-house social partners, supported by external expertise (business-related reorganisation consultants)	External actors (social partners, relevant public authorities, etc.)	External actors (labour market and industrial researchers, economists, political authorities)	Public administrations, sometimes with the support of other external actors (consultants, social partners, etc.)	Enterprises’ associations, local agencies
<b>Focus of interventions</b>	The company and its workforce as a whole (or as entire groups)	The affected workers (individually or in groups)	Local labour market and industrial environment	Either the company as a whole or the affected workers	The company as a whole or groups of firms

### ***III. Discussion of intermediate results with policy makers***

The first intermediate results were first presented to about 160 regional representatives of labour market institutions in three regional workshops held in Bottrop (North Rhine – Westphalia), Torino and Berlin. These workshops were useful for increasing awareness of this issue and improving communication and coordination of the actors involved. In North Rhine – Westphalia, given the peculiar local context, the workshop was also the starting point for the discussion on guidelines for the regional programme of early labour market interventions.

## **6. MAIN RESULTS**

Some important lessons in terms of policy recommendations are drawn from the good practices analysed. They can be summarised as follows:

practical solutions to employment crises can be considered examples of good practices only if they aim at both increasing the firm's competitiveness and preserving employment security. The combination of these two goals and the consequent cooperation of the actors involved represents a basic requirement of early and company based interventions. Given the twofold objective, a new approach to partnership and cooperation is required from social partners. On the management side, human resources and their know-how have to be considered as a crucial factor for a firm's competitiveness, favouring participation and internal dialogue. On the workforce side, every change or reorganisation has to be viewed as an opportunity rather than a threat, considering company restructuring as a necessary process for creating or at least saving future jobs.

This kind of intervention can succeed only if there is great coherence and coordination between labour market and economic policy and, in general, a favourable legal environment. Recent developments and reforms in legal and policy instruments across Europe (see, for example, the German Labour Market Promotion Act) seem to work in this direction and are expected to have a positive impact on the implementation of the early labour market approach proposed by the project.

Early monitoring and anticipation of future developments of labour markets, above all at local level, is seen as the most effective way to cope with redundancies successfully. In this sense, the Dutch "Prospect Method" represents

a best practice early warning system that should be transferred to other regional contexts.

A further success factor of early intervention is the existence of a set of appropriate labour market support instruments, such as jobtransfer models regulated by law and an adequate set of wage subsidies and living allowances. For example, the Austrian law defines the criteria for recognition of a measure as a labour foundation, stating also the tasks of the different partners involved. At the same time, the regulation of the labour foundation implies that participants have an entitlement to the so-called "training unemployment benefit"; in addition, they receive a "foundation grant" when participating in training measures.

To enhance the probability of finding a job in the external labour market, mainly in the presence of "non job related" barriers (such as sex, age, race, etc.), the existence of outplacement and jobfinding support is also essential, using companies' and other actors' relations or networks in order to favour direct contact with possible future employers (see, for instance, Italian detachment and German secondary work contracts).

Since most of the good examples gathered were adopted by large companies, it is necessary to develop further specific transfer models for SMEs, given their structural and financial constraints. The two basic requirements of these models are the creation of enterprise associations (as in France) and the existence of external supporting structures able to provide adequate information and access to know-how and available resources.

**PROJECT NAME:  
NETWORK OF EUROPEAN CITIES  
FOR THE CREATION OF  
COMBINED INFORMATION-  
GUIDANCE-TRAINING AND  
PLACEMENT SYSTEMS**

**1. OBJECTIVES**

The project was aimed at defining the features of integrated employment services (the so called Information-Guidance - Training and Placement (IOFI) systems), providing practical examples on the basis of the project participants' experience in this field.

Its final-operational-objective is to actively develop employment services targeted to people excluded from the labour market.

**2. TARGET POPULATION**

People with difficulties in integrating into the labour market, in particular the long term unemployed, drop-outs, women re-entering the labour market, unskilled workers, disadvantaged and handicapped people, etc.

**3. COUNTRIES INVOLVED AND  
PROJECT'S PARTNERS**

Germany, Italy, the Netherlands, Spain and the United Kingdom were the countries involved.

The IOFI network of "European Cities for the Development of Integrated Systems of Information, Guidance, Training and Insertion" is composed of both public and private organisations operating in the field of employment services; it was created in 1995 to promote the IOFI system as an integrated employment service.

*Project leader and co-ordinator* was Lan-Ekintza, Bilbao, Spain (local socio-economic development agency).

*Other partners* were ACTIVA, Enschede, the Netherlands (public and private organisation specialised in the socio-economic field, in particular in local labour market and programme development interventions); CILO, Turin, Italy (local institute providing assistance in job seeking and in enterprise creation, supporting local development projects and SMEs); Department of Labour and Social Affairs of the Government of Hamburg,

Germany; Training and Enterprise Council (T.E.C.), Sheffield, UK (a public organisation promoting employment and supporting local firms)

Project partners were characterised by different cultures, languages, work methods, objectives: this influenced the definition of common objectives, the main principles of the guide and the operative tasks of the network.

**4. FEATURES OF THE PROJECT**

**4.1. Methodology and tools**

The implementation of the project was based on periodic meetings held from March 1997 to October 1998 in the cities of each project member.

Each meeting was generally organised in two parts: in the first one, joint decisions – usually regarding project management – were taken and guidelines for future work – above all for the preparation of the final "methodological guide" – were defined; in the second part national experiences on specific topics (such as organisational structure, methods, treatment of target population, etc), were presented and discussed.

Partners' experiences were used to draw up the "methodological guide".

Between meetings each partner worked independently following the schemes proposed. Information and material generated by each partner were collected and harmonised by process consultants, who also maintained inter-network communication.

**4.2. Steps**

The project went through seven main steps centred on the implementation of the methodological guide and the presentation of national experiences. They can be summarised as follows:

*clearer definition of project's objective and agreements on its management* (each partner's duties, financial aspects, etc.). In this phase, on the basis of the experience of each partner, discussion on the necessary features of an integrated employment system began.

*Development of a common and transferable system for surveying local labour markets (Survey Guide) and first definition of tools to analyse target groups.* This step was strongly influenced by the Dutch partner's experience,

with methodology for analysing local labour markets and anticipating future economic as well as labour demand trends (the so called "Prospect Method"). This example was reported in the survey guide as good practice of labour market monitoring.

*Presentation of the first draft of the Survey Guide and study of measures specifically addressed to the long term unemployed.* According to the integrated approach chosen, it was decided to include the Survey Guide in the methodological (IOFI) guide – and not to consider it as an independent document. There was also discussion on its real transferability either to other circumstances or countries. The study of alternative ways to treat the long term unemployed was based on the German "Work and Training Programme", characterised by the combination of periods of work (lasting from 1 to 3 years) and vocational training.

*Discussion on the structure of the IOFI guide and analysis of different approaches toward the handicapped or very disadvantaged people.* During the Italian seminar it was noted that some specific target groups are treated in quite different ways by different organisations. For example, while in the city of Hamburg (Germany) people with severe health or social problems are almost exclusively supported by pure assistential programmes rather than employment measures, in the Italian region of Piemonte they could be entitled both to welfare and employment benefits and be addressed by active labour market policies.

*Definition of the final structure of the guide and analysis of the Sheffield experience.* On the basis of the evaluation methodology adopted by the British partner (Sheffield TEC), it was decided to add to the guide a chapter on follow-up monitoring and evaluation (only basic features and main guidelines) of IOFI systems. The Sheffield case was also studied more deeply in relation to the recent British employment policy, the "New Deal".

*Discussion on the first draft of the guide and definition of the programme of the final meeting*

*Presentation of the final version of the IOFI guide and of the main results of the project.* Since the meeting was intended as a workshop at which invited people should actively discuss and give constructive feed-back on both the guide and the results of the project, they were presented to a limited number of officers in local development agencies or public administrations and staff of employment services.

## 5. MAIN RESULTS

The final output of the project was the "Guide for the design and management of IOFI Services".

The Guide provides a detailed description and analysis of the main features of an "ideal" integrated employment services from a political, operational and managerial point of view. It is addressed to officers responsible at the local level for directing, planning and managing personalised employment services, such as local administrators, training or placement agencies' managers, policy makers.

The guide is structured in four main parts:

the political and strategic framework;

the IOFI integrated system;

the phases of the system (or activation process);

integrated general management.

*1. The political and strategic framework* focuses on local contexts, which represent the natural territorial level to successfully implement active employment policies. At this level, employment policies are part of an integrated system, which may be managed in different ways in terms of the number and kind of responsible institution (i.e., only one or several organisations, which may be public or private or both). In any case, long term (strategic) objectives, target groups, budget limits and areas of responsibility are defined by political decision makers.

Given the political framework, an integrated employment system could be oriented toward labour demand, target groups (labour supply) or policies co-ordinating demand and supply. Each kind of approach influences the definition, objectives and contents of a service's functions.

Supply-oriented services focus on long term unemployed and individuals at risk of prolonged exclusion from the labour market (due, for example, to technological progress and consequent obsolescence of some workers' skills, company closures, etc.). Their aim is then to (re)integrate such individuals into employment before their occupational exclusion shifts into social isolation. In the light of the features of their target population, supply-oriented services present developed guidance functions, requiring the provision of personalised services and the presence of

different intermediary staff (psychologists, social assistants, etc.).

Market-oriented services are addressed to unemployed individuals with some difficulties in finding a job but still motivated in their search and not yet too far removed from the labour market. Their main objective is then to fill in local vacancies with those who clearly demonstrate the basic skills required to successfully do those jobs.

Placement is the main activity done by these services, which maintain close contacts with local companies in order to get information on the professional knowledge and skills required for new jobs.

In policy-oriented services the employment policy is fully integrated into the strategic and operational framework of local policy. Their main objective (i.e., to insert the unemployed into the labour market) is then strictly linked to

other political-local aims (such as city planning,

maintenance of public buildings, supply of services in education, health and environment sectors, etc.). Being embedded in a complex political framework, policy-oriented services are mainly concerned with research, analytical and evaluation tools.

Considering the partners' experience, the German case seems to be a supply-oriented service, the Dutch and the Italian cases are policy-oriented, the Spanish case is positioned mid-way between labour demand and supply and the British case shares features of both supply and policy-oriented services.

The following table presents the main strengths and weaknesses of these three models according to the project partners.

**Table 1 – Positive and negative aspects of different models of employment services**

	<b>Supply-oriented services</b>	<b>Demand-oriented services</b>	<b>Policy-oriented services</b>
<b>Positive aspects</b>	Particular attention to the unemployed with most difficulties in getting a job Social security costs are reduced at the local level	Integration less expensive, more efficient and easier to achieve More precise information on actual available jobs	Synergy with other kinds of policies and measures can favour more direct integration of the unemployed in the labour market
<b>Negative aspects</b>	Greater efforts required to integrate the most disadvantaged groups Necessity of more complex organisational and training resources and more numerous intermediary staff	Approach not suitable for the most disadvantaged unemployed Placement results are heavily dependent on general economic situation	Employment measures may be strongly influenced by political priorities, making their implementation conditional to the previous achievement of other objectives

2. *The IOFI integrated system*: this chapter describes the ideal integrated employment services pointing out the main features of its four basic functions (i.e., Information, Guidance, Training and Insertion) and their mutual links. The section also presents all the organisational issues, tools and instruments involved in each function. According to the partners' experience, three types of system organisation are defined:

a centralised model, in which a single institution is responsible for all functions and, at the same time, organises, implements and supervises the process (e.g., German and Spanish cases);

a mixed alternative, which combines centralisation of certain functions and the contracting out of others (e.g., the Dutch case)

a completely decentralised organisation or network (e.g., British and Italian cases)

3. *The phases of the system* provides a detailed analysis of the activation

process which each unemployed person must complete in order to achieve his/her successful integration into the labour market. Following an operational approach, this section presents and assesses all the practical tools

(including different kinds of interviews, tests, training courses, placement, etc.) developed by at least one project partner for each of the four functions of the employment system, providing some examples of their actual implementation. It also stresses the crucial role of skilled and well trained staff, the necessity of clear procedures (certificates, contracts, etc.) and the



importance of using flexible models/ tools in order to offer personalised services.

*4. Integrated General Management of the System:* this part explains how the integrated employment system can successfully be administered, paying particular attention to the relations between the political and the operational level, the establishment of rules for internal administration and the importance of co-operation with other local partners. This section describes also some basic elements of monitoring and evaluation methods and the role played by “support services” in supplying in-depth and specific analysis of the local labour market, sectors and qualifications highlighting in which job-seekers are likely to be integrated.

The guide is completed by an annex on four of the five case studies on which the guide was based:

Insertion. Pathway to additional jobs: Activa Enschede (the Netherlands)

Work experience and professional training: The Lander of Hamburg (Germany)

Support for the creation of new business ventures: Lan-Ekintza, Bilbao (Spain);

Information & diagnosis and counselling & assessment: Sheffield TEC (UK).

Comparison of these case studies led to the following concluding remarks.

On the basis of the common features of employment services, the five different countries involved in the project were divided into two different groups: the northern countries (Germany, the Netherlands and partly the UK), and the southern ones (Italy and Spain). While employment services in the first group are mainly financed by long-term resources and targeted to specific groups (mainly those with more difficulties in finding a job autonomously), in southern countries these systems are less structured and are addressed to a wider range of target groups. This is also due to the different characteristics of unemployment in the two groups of countries: in southern countries unemployment is not only the consequence of very specific, non labour market-related characteristics (such as health and social problems), but often derives from the lack of job opportunities and, more generally, from bad labour market conditions.

Evaluation of integrated employment services is still experimental in almost all the organisations participating in the project: it is in fact usually addressed to specific parts,

functions or aspects of the system, while the system as a whole is not assessed.

The creation of employment should be directed more at the promotion of self employment and new firms, since in existing firms facing continual technological changes and economic globalisation the concept of a “fixed dependent job for life” has been substituted by concepts such as flexibility, polyfunctionality, geographical mobility, temporary work, etc.

The implementation of active labour market policies requires a more active approach by public services and greater interaction with the local labour market, both demand and supply.

The concept of “employment” as one of the primary objectives pursued by economic policies at all levels of application requires increasing synchronisation and co-ordination between public and private institutions operating in this field.

**PROJECT NAME:  
NEW JOBS FOR NEW CITIZENS**

**1. OBJECTIVES**

The main objective of the project is to analyse whether remigrants from the former Soviet Union and Eastern Europe could be socially and professionally integrated in the labour market, favouring their occupation in the service sector at the local level.

In particular, the project is aimed at:

studying the remigration characteristic and policy in Germany, Finland and Greece, highlighting the mix of instruments and measures of social and occupational integration used in each country and assessing the efficiency of these instruments according to existing research and

the opinion of both the people involved and experts;

analysing the actual state of development and the employment potential of the service sector in the three partner countries, focusing on the real employment probabilities for East-West-remigrants;

providing advice and models (based on needs and past experiences of the target population) of effective integration policies;

favouring an international exchange of experiences on this topic.

**2. TARGET POPULATION**

Even if the project is ideally addressed to all remigrants, due to the specific

economic activities chosen (i.e., neighbourhood-related services, with particular attention to care for elderly, handicapped and children, housekeeping and maintenance work in housing estates) women represent the elected target sub-group.

**3. COUNTRIES INVOLVED AND PROJECT PARTNERS**

Germany, Greece and Finland

Project leader and co-ordinator: ABOE (Association of vocational training and local development), Germany; an association of experts in vocational training, social planning,

regional development and labour market policies.

Other partners: EETAA, Greece (agency to support municipal development, whose main task is scientific and technical assistance for local governments), in co-operation with the universities of Athens and Thessalonica and the University of Helsinki (with the VANTAA Institute of continuing education) with the co-operation of the Finnish Association of Municipalities and Communities.

**4. BACKGROUND**

In the last decade Eastern-Europe and former USSR have experienced radical political as well as economic changes, which have caused increasing outflows of population to Western Europe. Among new migrants, some had originally the nationality of the host country. In view of this cultural affinity, some countries (such as the partners of the present project) wish to favour the integration of "remigrants"

Since 1980, remigrants from the former Soviet Union have amounted to almost 1,300,000 in Germany, 15,000 in Finland and about 215,000 (including illegal remigrants) in Greece.

Beyond objective and subjective obstacles preventing social integration, remigrants encounter many problems in entering labour markets, which are characterised in many Western European countries by high unemployment rates. Jobs are scarce even for resident people and the competition is often high among people seeking a job. In this context, and also as a result of language and qualifications problems, remigrants have great difficulty in finding an acceptable and legal job in the host country. For this reason remigrants' unemployment rates are generally much higher than national averages: for example, in Finland 60-80% of remigrants are unemployed.

On the other hand, there are some activities in the service sector (mainly social and community-based activities) that are showing positive signs in terms of new jobs and new types of employment: for instance, help for elderly and disabled people, childcare services, housework and cleaning services, care of residential complexes.

## 5. FEATURES OF THE PROJECT

### 5.1. Methodology and tools

In each country involved each partner carried out two studies.

The first one focused on political aspects of integration of remigrants and on associated measures implemented by each government. This research

was based on existing studies and statistical data, relevant laws and regulations, national projects already working on this issue (for instance, the Finnish project "Remigration from CIS" or Greek research projects on cultural assimilation of Greek people from Pontus), expert interviews and, in the case of Germany, two surveys of state ministries

responsible for remigrants' integration policies. Apart from the size of the phenomenon, each national study points out existing measures addressed to remigrants, the role of public administrations in managing these measures at different levels (national, regional and municipal) and the eventual existence of pilot projects addressed to remigrants co-financed by ESF (namely, the Initiative "Employment").

The second study, based on a more practical approach, evaluated the desirable features for a local service agency in order to provide sustainable and regular employment (feasibility study) in neighbourhood-related services.

The following table summarises the main objectives and features of each national study.

**Table 1 – Objectives and methodology of national studies on the feasibility of a local agency providing neighbourhood-related services**

	Greece	Germany	Finland
<b>Objective</b>	To implement a pilot programme of personal, social and other services provided by remigrants in Killitheia, a town in the suburbs of Athens	To create a local service agency, specialised in support to elderly and childcare, in Osterholz-Scharmbeck (Lower Saxony)	To find out whether co-operatives run by immigrants could supply private social services in Vantaa, a town in the agglomeration of Helsinki.
<b>Methodology</b>	Due to the absence of official data on the nature and size of social needs (usually satisfied by the black economy), collection of basic data on the potential demand and supply of services, starting from the estimate of project's target population in the pilot region.	Survey of the needs of working parents with small children and/or people aged 65-80 years Systematic analysis of existing or planned services in this field and of professional (medical) care services Particular attention, at every step, to the possibility of remigrants' employment	With the collaboration of immigrant students: Collection of data and information Direct visits to different work places Interviews of local authorities and members of existing co-operatives

During the development of these studies the partners attended five meetings, in which they agreed the method of analysis, exchanged interim results, monitored the course of the project and discussed reports and final recommendations.

### 5.2. Steps

The project was characterised by three main steps:

1) *Start-up and elaboration of the first study:* the project started in Germany with staff recruitment, the definition of final agreements with the partners from Greece and Finland and the identification of the planned area for the pilot project in each country. In this phase a

first meeting in Greece was organised in order to prepare the first study of integration policies in the countries involved and clarify some financial and organisational aspects. Then each partner elaborated its national study on "Documentation and assessment of policy and measures relating to occupational and social integration of East-West-remigrants".

2) *Preparation and launch of the second study:* this phase started with a second meeting in Germany, at which future work, especially for the case studies, was planned. It is worth noting that during this meeting, due to the very different social and legal systems in the three partner countries, the original plan of a comparative study of the situation of neighbourhood-related services was changed into a local feasibility study on this kind of

service in each country. During the months following the meeting the German and Finnish partners collected national data for the second study. This activity was done later in Greece. Data collection was followed by two other meetings (in Greece and Germany) aimed at defining the concluding activities of the project and solving methodological problems of the implementation of the second study.

3) *Final discussion and diffusion of the main results*: the main results of the project were presented during a final meeting in Finland, which consisted of a seminar on integration of remigrants in the three countries involved in the project; a direct visit to an integration centre for remigrants in Tartu/Estonia<sup>8</sup> and a final conference, at which first recommendations on measures and policies for the integration of remigrants were discussed. Features and results of the project were then documented in a final report.

## 6. MAIN RESULTS

The analysis of the three national case studies and their common features led to the following conclusions:

remigrants' social integration is easier if it is accompanied by occupational integration: for this reason, employment possibilities for these target groups should be improved.

Social and personal services (the so-called neighbourhood related services) seem to offer employment opportunities for remigrants in the partner countries, mainly under new forms of self-employment (e.g., co-operatives). However, remigrants from former Communist countries, previously characterised by State-planned economies, are hardly inclined to self-employment. Finding a job is thereby associated with being an employee and remigrants are likely to accept a dependent occupation far below their qualifications rather than start up a new firm or activity.

In most cases the lack of language skills is one of the main obstacles to professional integration and it is certainly more relevant than lack of qualifications. Since the knowledge of the official language of the host country is a necessary pre-requisite for

integration in its labour market, an improvement of (intensive) language courses for remigrants is strongly needed to help vocational and social integration. In this sense, the so called "combination courses", in which traditional language training (usually lasting 10 months) is followed by a period of technical language training (at least 2 months), represent good practice. However, language courses are not generally so structured: for example in Germany they last 6 months and there is little room for teaching technical language.

The procedures for legal recognition of professional qualifications are often too slow and bureaucratic, hindering the integration of remigrants.

Traditional integration policies are aimed at alleviating remigrants' weaknesses rather than strengthening their potential. According to the latter approach, either remigrants' knowledge of Russian (or other Eastern European languages) or their levels of qualification (often reached on the job in their previous country) have to play a central role in integration programmes. Tourism and trade are good examples of economic sectors in which, for instance, remigrants' cultural competence and language skills can be successfully exploited.

Remigrants often have needs and problems quite different from immigrants and certainly very different from those of the domestic unemployed. Even if general programmes for disadvantaged groups could be addressed under certain conditions to remigrants as well, some specific measures would be necessary to assure their complete integration. Nonetheless, existing official data does not always allow them to be distinguished from the other groups: for example in Germany remigrants can easily obtain German citizenship, making it very difficult to separate them from other groups in local statistics. An accurate statistics data set is therefore a useful instrument for activating integration programmes successfully.

Social and professional integration of remigrants is usually a task of local administrations (i.e., municipalities), whose action is often limited or compromised by budget constraints and the lack of suitable political tools. A possible solution to these problems can be found in EU programmes, particularly where municipalities implement innovative integration programmes. In Greece, Community Initiatives financing innovative concepts of integration (such as "Horizon" and

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<sup>8</sup> This centre is financed by the Finnish government and is aimed at helping remigrants with Finnish descendency in former Soviet Union regions. The Greek and German governments have similar care programmes for potential remigrants in their current settlement areas.

“Integra”) represent the only means for municipalities to act in this field.

The existence of irregular markets and clandestine work hinders the development of regular services. Due to the incidence of non wage labour costs on the price of regularly supplied social and personal services, families prefer to purchase them on the irregular market. The market value

of this kind of services is therefore determined by the black economy. Under these conditions, regular employment can be created only with public support, such as labour cost reductions, tax incentives and any other form of mixed or social economy. In this framework, the Finnish co-operative of unemployed remigrants represents a good practice.

The specific results of each national feasibility study can be summarised as follows:

In Greece, a crucial role is played, on the one hand, by the lack of a well organised and developed welfare state (whose functions are often substituted by family networks), on the other by the practice of satisfying personal and social needs on the irregular market. The great demand for social services (such as neighbourhood-related ones) is then supposed to be covered by a substantial informal supply (even if both cannot be precisely estimated, because of the lack of reliable data). Given this context, Greek citizens interviewed expressed the willingness to also use services offered on the regular market if their price is not much higher than the price of corresponding services on the irregular market.

In Germany the creation of an agency in the selected area seems possible only if it were based on a mixed economy, combining subsidised labour with revenues from the market. The German project of the “Osterholzer Haushaltsdienste” (Household-related services in Osterholz) relies on the idea of creating a range of services in private households. This agency can both create new wage-subsidised jobs for remigrants and offer placement of external assistants as well as commercial providers.

In Finland, remigrants are already actively involved in most immigrants’ co-operatives, which represent a type of firm particularly favoured by Finnish law. In general, these co-operatives differ from others not by their business idea, but by their concentration in fewer fields: childcare, language courses and interpreting services, travel agencies for trips between Finland and Russia, Russian café, construction. This legally favoured form of

self-employment in co-operatives for the unemployed was considered to be a good practice for creating new jobs in neighbourhood related services and should be transferred to other Member States.

**PROJECT NAME:  
THE ROLE OF GUIDANCE IN  
TACKLING LONG TERM  
UNEMPLOYMENT**

**1. OBJECTIVES**

The aim of the project is to assess the level of development of guidance services for long-term unemployed in five Member States characterised by different labour market conditions and policies.

This general objective can be broken down into four key-objectives as follows:

to identify and classify across the five Member States the range of guidance services provided to the long term unemployed;

to identify and underline innovative actions in this field;

to discuss the main results in workshops and international seminars;

to diffuse findings, including a set of guidelines and recommendations, across the European Union.

**2. TARGET POPULATION**

Long term unemployed (i.e., unemployed for more than 12 months)

**3. COUNTRIES INVOLVED AND PROJECT'S PARTNERS**

Germany, Greece, The Netherlands, Sweden and the United Kingdom.

The project was carried out by a network of five leading research centres and consultancies in Germany, Greece, the Netherlands, Sweden and the United Kingdom.

Project co-ordinator is THE HOST Consultancy, the UK partner.

The other partners are:

the German Gesellschaft für Forschung und Entwicklungsprojektierung GMBH (GFE);

the Greek Institute of Technological Education (ITE);

the Dutch Hobéon Management Consult bv;

the Swedish Institutet för Personal – och Företagsutveckling (IPF).

Members of the network were chosen to represent different situations within the European Union, in order to ease transferability of results in different contexts.

**4. BACKGROUND**

In recent decades the European Union has experienced growing rates of long-term unemployment: in 1996 about 48% of European unemployed had been out of work for one year or more. All the five Member States participating in the project observed, from 1990 to 1997, increasing unemployment spells: currently, according to national data, the incidence of long term unemployment varies from 30% in Germany to almost 60% in Greece. In Sweden, where unemployment represents a relatively new phenomenon (until 1990 unemployment rates were usually below 2%), long-term unemployment grew from 15% of total unemployment in 1990 to almost 40% in 1996.

**5. FEATURES OF THE PROJECT**

*5.1. Methodology and tools*

The project started from the definition of a common survey to be used in all five Member States participating in the project in order to gather information on a representative sample of agencies providing services to the long-term unemployed. It is worth noting that the survey was not designed to map national provision, but to gain information on the main types of providers in each State and to find examples of good practice.

The selection criteria of each national sample, being influenced by the way in which those services are delivered in each country, were established independently by each partner.

The results of the five national surveys were used for two different purposes:

they constituted the basis for a comparative study aimed at evidencing common aspects and significant differences in services available for long-term unemployment in countries characterised by different economic as well as labour market conditions;

since the service providers interviewed were asked to indicate if some aspects of their service were, according to them, particularly innovative and/or successful, the findings of the national studies were also used to select a number of cases.

The case studies selected were then directly visited in order to analyse the key elements of their innovativeness or success.

All the findings of the research were finally used to point out:

a set of success criteria for the delivery of guidance services to the long-term unemployed;

some relevant questions useful for policy makers and service providers in Member States to improve their activities and results;

a list of final recommendations addressed partly to policy makers and partly to service deliverers.

## 5.2. Steps

The project was carried out in the following main stages:

start-up, contacts between partners and agreements on national work;

definition of the common questionnaire for the survey and implementation of national studies on guidance provision for the long-term unemployed;

direct visits to case studies and analysis of good practice;

dissemination of project outputs and outcomes through national workshops (one in each country), a transnational conference (in the UK) and a final report.

## 6. MAIN RESULTS

### *Main results of each national survey*

In Germany, although guidance services are mainly provided by the public employment service, a wide range of municipal, voluntary and church organisations operate on a smaller scale;

in Greece public employment services are rarely used by the long-term unemployed, who prefer “informal” sources of guidance;

in the Netherlands guidance services are increasingly co-ordinated at a municipal level and delivered by private providers. Services are strongly focused on clients’ needs.

in Sweden services are progressively aimed at supporting self-help and increasing employability;

in the UK provision of services for the long-term unemployed are highly fragmented and

there is a mixture of mandatory and discretionary provision.

### *Findings of the comparative study based on national surveys results*

There are differences between agencies located in different countries as regards the definition of the most important objectives in services delivery. In particular, the majority of the interviewed agencies declared that the primary aim of services addressed to the long-term unemployed is:

to improve self-confidence and self esteem in Germany, identifying their interests and abilities in Sweden;

to place them in employment in Greece and the Netherlands;

to improve their motivation to find appropriate education, training and employment.

Differences in main objectives reflect different roles in helping the long-term unemployed: some agencies specifically aim at placing the long-term unemployed into work, others provide broader services (such as counselling, training, etc.)

“Short advisory or diagnostic guidance discussion” and “information to personal callers” represent the most common services provided by the interviewed agencies, even if the full range of services supplied varies notably between the five Member States:

at least 50% of German agencies provide short and long courses to help with career development and job search skills;

all the Greek agencies and three quarters of Dutch ones give information also to telephone callers; as do 85% of British agencies, which also conduct full guidance interviews;

just under three quarters of Swedish agencies assess beneficiaries’ interests and attitudes to assist their choice and provide courses to improve their job search skills.

The most used indicator for evaluating whether and how objectives are met in terms of results is the number of beneficiaries entering employment. Less attention is generally paid to the number of long term unemployed entering education/training programmes, while other indicators are widespread only in some States. For example, “general feed-back from beneficiaries”, “follow-up of clients” and “formal evaluation from beneficiaries” are considered important indicators in the UK and Sweden, but less so in the other Member States.

Funding is usually linked to a certain range of targets, output and outcomes, particularly in the Netherlands and the UK. Total funds, regardless of their source (either European or national), are often considered inadequate to properly meet the long-term unemployed's needs.

The most commonly perceived obstacle for the long-term unemployed is the mismatch between their skills and actual available jobs, even if the current lack of available jobs and the nature of the skills required is strongly determined by national/regional labour market features. In Germany, the lack of confidence and self esteem among the long-term unemployed is considered another worrying problem.

### ***Evidence and features of good practice***

As mentioned above, in the national survey services providers were also asked to indicate if they considered their service particularly innovative or successful and whether they would be favourable to be treated as case studies.

Case studies were then selected by partners using the responses to this question: in this way 47 cases were selected, almost equally distributed among the five States.

In all cases meetings between researchers and services providers were arranged to discuss provision. In some cases, researchers could also meet final beneficiaries.

Case studies analysis pointed out the following elements of good practice:

*Networking and cross-agency working:* services addressed to the long-term unemployed are more effective in local areas characterised by greater co-ordination between guidance, related training and other services. Good practices of co-ordination were found especially in the Netherlands and the UK. For example, the Dutch "Brug-en Instroomprojecten" (Bridge and inflow project) is a non-profit organisation with strong links with the CNV and FNV Unions: it usually implements small innovative projects and is currently working with employers who are involved in 50 Collective Agreements. In 1996 880 long-term unemployed found a job through these projects.

*One stop-shop or single counter approaches:* services to the long-term unemployed are more effective if provided according to an integrated approach. Beneficiaries are favoured if they can find all the information/services they need in the same place and if they are personally

supported by the same provider. This approach requires, other than inter-agency co-operation, increasing links between employment and social systems. A good example is represented by the British "Future Prospects", an education, training and employment services in the City of York particularly used by the long term unemployed (who are estimated to be one in five of their total of around 28.000 clients in 1997) who can access a range of information about learning and employment opportunities. The organisation is based on a partnership between several actors, including local administrations, colleges, guidance, training and employment services.

*Self-help information and the use of Information and Communication Technology (ICT):* to enhance the access to services, mainly in remote areas, ICT provision of information and guidance services is developing in a number of countries, in particular in the UK and Sweden. Good practices are the British free telephone help-line services for education, training and work launched in February 1998 by the Department for Education and Employment ("Learning Direct") and 40 Swedish local info-centres ("Infoteket") which are aimed at providing self-help support to individuals (through guidance and ICT-based support on education, training and labour market information), including the long-term unemployed.

*Addressing provision to the needs of particular groups:* the most effective guidance services are the ones specifically addressed to the needs and problems of the long-term unemployed. Good practices in this sense were found in Greece, the Netherlands and the UK. For instance the Greek National Manpower Employment Organisation (OAED), to stimulate self-help and reduce bureaucracy, has recently provide an "Employment Card" to individuals out of work for more than three months. The card contains information, that the holder can give to potential employers who wish to hire him or her, on relevant job subsidies; it also enables the holder to participate in training seminars organised by agreed agencies.

*Flexible or market driven provision:* the mismatch between the skills of the long-term unemployed and available jobs can be reduced by acting either on the supply or the demand side. In particular it could be more effective, before training beneficiaries, to try to understand employers' recruitment needs and then support the long-term unemployed in meeting those requirements. A good example of more flexible action is represented by the



Dutch “Emplooi”, which is an association of volunteer advisers aimed at placing refugees into employment through both guidance to the refugees and direct contact with firms. In 1997 this association found a job for 1000 refugees, 80% of whom were hired without any particular employment subsidy.

*Full-service approach to employers:* programmes of guidance and support for the long-term unemployed are likely to be successful, as already mentioned, if they are closely linked with labour market needs and are actually aimed at helping beneficiaries to match available job opportunities. On the other side, this approach can cause substitution effects and, in outcome-related funding regimes, can make the long-term unemployed choose inappropriate work: if this is the case,

labour turnover increases abnormally and the probability that beneficiaries will return to unemployment is

high. Given these caveats, a good example is the Swedish “Amu Gruppen”, which closely links training to available jobs through the use of several methods, such as ICT, Open Learning and “practice” firms” simulating the management and operation of typical firms’ departments. As a result, placement rates registered by this service provider are around 60%.

In the following table the main elements of best practice and relevant examples are summarised.

**Table 1 – Elements of good practice and relative examples**

<b>Elements of good practice</b>	<b>Case studies</b>
Net-working, co-ordination and cross-agency working	The Dutch Brug-en Instroomprojecten (Bridge and inflow project).  In general, good examples in the Netherlands and the UK.
One stop-shop or single counter approach	The British “Future Prospects”
Self-help information and widespread use of Information and Communication Technology	The British free telephone help-line services for education, training and work; the Swedish local info-centres (“Infotek”).  In general, good examples in the UK and Sweden.
Addressing provision to the need of specific groups	The Greek National Manpower Employment Organisation (OAED).  In general, good examples in Greece, the Netherlands and the UK.
Flexible or market-driven provision	The Dutch “Emplooi”
Full service approach to employers	The Swedish “Amu Gruppen”

## ***Recommendations***

The project also contained a list of recommendations addressed to either policy makers or service providers. They can be summarised as follows:

*Policy makers* should clearly identify the role that career guidance can effectively play in supporting the long-term unemployed in the labour market. They should clearly define coherent, effective and accessible objectives, whose level of achievement, tested rigorously through evaluation, should also influence the total amount of funds. The latter should be increasingly fed by European funding, mainly to finance innovative approaches. National and local funds should instead be used to sustain long-term provision, which is unlikely to be effective if based on short-term funds. Policy makers have nonetheless to bear in mind that while guidance can assist individuals in exploring available jobs it cannot create employment on its own. In this sense, policy should be aimed at creating new jobs and training opportunities, eliminating or reducing labour market rigidities.

*Service providers* should be trained, qualified and regularly updated, so as to offer expert and impartial information and guidance. They should also promote the effective use of computer-aided information systems to enhance client access to services, without neglecting, in-depth individual guidance where necessary. It is also important to enhance co-ordination and links between both agencies and services, introducing, as far as possible, "one-stop shops" and "one-counter approaches": fully integrated services are likely to be more effective than independent agencies and services. Finally, guidance providers, on the basis of evaluation results or other evidence, should provide policy makers with ongoing feed-back, leading to timely properly addressed intervention to help overcome eventual obstacles to the long-term unemployed in the labour market.

**PROJECT NAME:  
UNEMPLOYED WOMEN AGED  
MORE THAN 40, TRANSNATIONAL  
TECHNIQUES OF COUNSELLING  
AND VOCATIONAL GUIDANCE**

**1. OBJECTIVES**

The main objective of this project is to develop a guide on counselling, guidance and employment reinsertion pathways for women aged over 40 re-entering the labour market. The guide is aimed at employment services operators and it is based on actions on the supply side to improve and reinforce women's motivation and competencies through the reinforcement of self-esteem, social relations and relational abilities.

The hypothesis is that the conditions of women in the labour market need specific attention and specific modes of intervention and that the exchange of experience across European countries may improve intervention in this area for these target groups.

The development of common best practices may then be diffused in the local area through the creation of networks and links among local actors operating in the field.

**2. TARGET POPULATION**

Long-term unemployed women aged over 40 re-entering in the labour market.

**3. COUNTRIES INVOLVED AND PROJECT PARTNERS**

The research involved five European countries: Italy, France, Spain, UK, Belgium. In the project description there is no indication of project partners, besides the Italian one, linked to the CGIL trade union.

**4. FEATURES OF THE PROJECT**

**4.1. Methodology and tools**

The main hypothesis at the base of the project is that in order to improve the position of disadvantaged groups in the labour market, it is necessary to work on their attitudes with a psycho-social approach based upon the support and reinforcement of existing competencies

(however they have been achieved), self-esteem, motivation, in order to develop an active, self-help attitude in confronting changes in social, labour market and personal conditions. This approach requires that:

- participation mechanisms are developed
- social and professional competencies are not too distant
- an open approach is adopted.

**4.2. Steps**

The steps taken were the following:

Putting together transnational experiences in the field

Development of common material

Testing of the methodology

Evaluation of results and revision of the model.

Definition of the guide

Diffusion of the guide and of methodologies at the local and national level through the activation of networks of actors operating in the field.

The first two steps involved the analysis of the different national experiences in the area of vocational guidance and counselling for the target population and the definition of a specific training model based upon the development of competencies, motivational support and improvement of self-esteem, development of relational and active job search skills, encouragement of employment paths linked to social needs. This step involved the realisation of 5 seminars in the partners' countries (Turin, Barcelona, Paris, Liverpool)

Testing of the model was carried out through a specific training course aimed at 10 women. The course included class-room training and training periods in local firms.

Classroom training was based on 7 elements: constitution and reinforcement of the group; self-knowledge; personal and professional balance; gender identity; labour market regulation and unions rights; labour market conditions; synthesis and assessment of the experience and preparation for the in-firm training period.

Ten women were selected among women over 40 years of age, unemployed for more than 36 months, with a low educational level and lack of specialised professional skills, difficult economic situation and little or no links with the labour market. Of the 45 women asked to

participate in the first selection phase, only 27 were present. Of these, 20 were asked to participate in motivational interviews. Only 16 participated in the interviews and 10 were selected for the training course and the in-firm training. A first insight, therefore is that it is difficult to reach and involve this target group.

The training course lasted 3 weeks and involved professors and animators, a tutor with an important guidance role for the group of women and the project manager.

The in-firm training was intended to test and add value to the work done in class. The definition of the enterprise in which the training should take place and the role of the women was developed during the classroom training together with the participants. Enterprises were mainly small and operating in the service sector.

## **5. MAIN RESULTS**

Results are considered “good” by the partners, teachers, tutors, women. Some women left the training period before its end. The comment on this issue is that some drop outs are endemic, while others are due to the real disadvantaged conditions of the selected women and their “assistance dependence” attitude.

The guide is said to include an analysis of the labour market conditions and legislation in Italy, France and Spain, together with short descriptions of the most interesting examples of best practices in each country. The guide is to be published in 200 copies in all the languages of the partners.

## **ANNEX: PARTICIPANTS AND/OR PROJECT CO-ORDINATORS**

### CAPITALISATION, TRANSFER AND DIFFUSION OF TOOLS AND METHODOLOGIES AIMED AT IMPROVING LOCAL LABOUR MARKET MANAGEMENT:

ESPACE Inter-Initiatives (E2i)  
Société Anonyme à Capital Variable –  
Coopérative de Production  
2, rue Ducourouble, 59000 Lille  
France  
Tel: (33) 3 20 78 20 37  
Fax: (33) 3 20 57 97 71  
E-mail: [e21@nordnet.fr](mailto:e21@nordnet.fr)

*Contact: Mr. Henri Le Marois*

### CONTRIBUTION OF MUTUAL AND BILATERAL SOCIAL PROTECTION TO EMPLOYMENT AND EMPLOYABILITY:

KOOPI – Kooperativa Institutet  
Box 20063, S-10460 Stockholm  
Sweden  
Tel: (46) 8 772 89 90  
Fax: (46) 8 642 81 06  
[jan.olsson@koopi.se](mailto:jan.olsson@koopi.se)

*Contact: Mr. Jan Olsson*

### DEVELOPMENT OF CROSS-BORDER RURAL LABOUR MARKETS IN GERMANY AND THE NETHERLANDS:

Universität Osnabrück  
Öffentliche forschungs- und  
Bildungseinrichtung  
Seminarstr. 19, 49069 Osnabrück  
Germany  
Tel: (49) 541 969 42 71  
Fax: (49) 541 969 43 33

*Contact: Prof. Dr. H.J. Wenzel*

### JOBTRANSFER:

ÖSB Unternehmensberatung GmbH  
Meldemannstr. 12-14, 1200 Wien  
Austria  
Tel: (43) 1 22 168 0  
Fax: (43) 1 33 168 102  
E-mail: [oesb@oesb.at](mailto:oesb@oesb.at)

*Contact: Ms. Irene Horejs*  
(project co-ordinator)

Gesellschaft für innovative  
Beschäftigungsförderung G.I.B.  
Im Blankenfeld 4, D-46238 Bottrop  
Germany  
Tel: (49) 2041 767 0  
Fax: (49) 2041 767 299  
E-mail: [g.i.b.@t-online.de](mailto:g.i.b.@t-online.de)

Sozialpädagogisches Institut Berlin  
Boppstr. 10, D-10967 Berlin  
Germany  
Tel: (49) 30 690085 0  
Fax: (49) 30 690085 77  
E-mail: [spi-sg@t-online.de](mailto:spi-sg@t-online.de)

Codex s.c.r.l. – Agenzia di Sviluppo  
Piazza Carlo Emmanuele II, 19  
I-10123 Torino, Italy  
Tel: (39) 11 8123312  
Fax: (39) 11 8121844  
E-mail: [codex@codex.it](mailto:codex@codex.it)

Réseau pur le développement de l'entreprise  
(RDE)  
44, Rue Pasquier, F-75008 Paris  
France  
Tel: (33) 1 44698650  
Fax: (33) 1 45228908

Activa  
Boulevard 1945, 340  
NL-7500 AL Enschede,  
Netherlands  
Tel: (31) 5348 14400  
Fax: (31) 5348 14403  
E-mail: [activa@activa.nl](mailto:activa@activa.nl)

CREATION OF COMBINED  
INFORMATION-GUIDANCE-TRAINING  
AND PLACEMENT SYSTEMS:

LAN EKINTZA-BILBAO

Uribitarte, 18-4th Dcha  
E-48001 Bilbao  
Spain  
Tel: (34) 94 4205300  
Fax: (34) 94 4205313  
E-mail: [Ian-ekintza@lane.bilbao.net](mailto:Ian-ekintza@lane.bilbao.net)

*Contact: Ricardo Barcala*

ACTIVA

Boulevard 1945, 326 a 7511  
Postbus 482, NL-7500 AL Enschede,  
Netherlands  
Tel: (31) 53 481 4487  
Fax: (31) 53 481 4403  
E-mail: [info@activa.nl](mailto:info@activa.nl)

*Contact: Henk Vosmer*

REGIONE PIEMONTE

Assessorato al lavoro  
Servizio politiche attive del Lavoro  
Via Pisano, 6 – 10128 Torino  
Italy  
Tel: (39) 011 4321458  
Fax: (39) 011 4324878  
E-mail: [maugeri@regione.piemonte.it](mailto:maugeri@regione.piemonte.it)

*Contact: Concetto Maugeri*

SHEFFIELD TEC

St. Mary's Court, 55 St. Mary's Road  
Sheffield S2 4AQ  
United Kingdom  
Tel: (44) 114 270 1911  
Fax: (44) 114 275 2634  
E-mail: [skearney@sheffieldtec.co.uk](mailto:skearney@sheffieldtec.co.uk)

*Contact: Sheila Kearney*

FREIE UND HANSESTADT HAMBURG

Behörde für Arbeit, Gesundheit und Soziales  
Hamburger Str. 118, 22083 Hamburg  
Germany  
Tel: (49) 40 298 827 44  
Fax: (49) 40 298 833 53  
E-mail:  
[bao203@mailhub.fhnet-dbp.de](mailto:bao203@mailhub.fhnet-dbp.de)

*Contact: Jürgen Gallenstein*

NEW JOBS FOR NEW CITIZENS:

Arbeitsgemeinschaft Berufsbildung und  
örtliche Entwicklung (ABÖE) e.V.  
Neue Landstr. 23  
D-27721 Ritterhude  
Germany  
Tel: (49) 4292 819 055  
Fax: (49) 4292 819 054

*Contact: Ulrich Müller*

THE ROLE OF GUIDANCE IN TACKLING  
LONG TERM UNEMPLOYMENT:

The HOST Consultancy  
PO Box 144  
Horsham, West Sussex  
United Kingdom  
Tel: (44) 1403 211440  
Fax: (44) 1403 251866  
E-mail: [info@hostconsult.co.uk](mailto:info@hostconsult.co.uk)

*Contact: Simon Byshe (co-ordinator)*

Gesellschaft für Forschung und  
Entwicklungsprojektierung GmbH  
Grunder Weg 13, Postfach 463  
D-42005 Aachen  
Germany  
Tel: (49) 241 918 300  
Fax: (49) 241 155 646  
E-mail: [GFEaachen@aol.com](mailto:GFEaachen@aol.com)

*Contact: Dr. Ulrich Daldrup*

Institute of technological education – ITE-  
NARIC-ENIC  
56 Sygrou Avenue  
Athens 11742 – Greece  
Tel: (30) 1 922 1000  
Fax: (30) 1 922 7716  
E-mail: [inteek@netor.gr](mailto:inteek@netor.gr)

*Contact: Dr. Theo Papatheodossiou*

The IPF Institute of Uppsala  
Uppsala Science Park, Glunten  
S-75183 Uppsala  
Sweden  
Tel: (46) 18 55 20 30  
Fax: (46) 18 55 94 77  
E-mail: [peder.hard@ipfuppsala.se](mailto:peder.hard@ipfuppsala.se)

*Contact: Dr. Peder Hård af Segerstad*

Hobéon Groep  
Scheveningsweg 46  
2517 KN Den Haag  
The Netherlands  
Tel: (31) 70 30 66 800  
Fax: (31) 70 30 66 870  
E-mail: [hobeon@pi.net](mailto:hobeon@pi.net)

*Contact: Drs Hans G.J. Stoltenberg*

TRANSNATIONAL TECHNIQUES OF  
COUNSELLING AND VOCATIONAL  
GUIDANCE:

CGIL – Ufficio Progettazione Centro  
Informazioni Disoccupati  
Via pedrotti, 5  
10152 Torino – Italy  
Tel: (39) 011 2442 395  
Fax: (39) 011 2442 434  
E-mail: [cgil.upcid@arpnet.it](mailto:cgil.upcid@arpnet.it)

*Contact: Vincenzo Scudiere*

European Commission

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