



*Ministero del Lavoro
e delle Politiche Sociali*

Ufficio Centrale O.F.P.L. - Divisione IV

Summary of the
**Community Initiative Programme
EQUAL**

1. ROUND 2 OF EQUAL AND THE NATIONAL CONTEXT

Round 2 of the EQUAL Initiative is being launched at a time of radical change in the economies and markets. Like any process which affects the lives of millions, change has the potential to improve working conditions; however, it could also cause new forms of inequality and discrimination.

At the time of launching of Round 2 of the Initiative, the labour market situation in Italy remains fluid. In the last ten years, the Italian labour market has evolved greatly as regards both the labour force profile (greater female participation, ageing work force, higher levels of education, etc.) and the production system (with the emergence of the *new economy*). These changes are gradually modernising Italy's development model, bringing it closer to those of other European countries. At the same time, however, these transformations have created or strengthened the barriers to equal opportunities of access to the labour market for the most disadvantaged groups. These obstacles, in turn, interact with Italy's structural problems, as there exists a two-speed economy: one in the Centre/North and one in the Mezzogiorno. Job opportunities are mainly concentrated in the former, whereas unemployment remains high in the latter. There are thus inequalities within the population in market access and survival.

2. THE EQUAL STRATEGY IN ITALY

2.1 Innovation

In order to promote new ways of combating any form of discrimination in the labour market, Italy has developed a three-pronged strategy, which make EQUAL a laboratory of innovative inclusive practices. These three lines of action provide a cross-the-board framework of reference for the thematic areas, to which EQUAL can contribute with new instruments, methods, and products capable of influencing local, national and European policies.

More specifically, these lines of action include:

- ***Lasting integration of employment and social policies*** — EQUAL provides a unique opportunity to foster the integration between social and employment policies. In order to eliminate the current barriers in the labour market access, EQUAL will work across the demarcation lines between the two policy areas, identifying common goals and strategies and experimenting with new inclusive practices in a holistic approach to the problem of accessing and being retained in the labour market.
- ***Development of a Knowledge Society free from discrimination*** — The way in which the Knowledge Society is currently developing involves a highly selective use of human resources, matching the professional and interpersonal skills available to fast-changing production methods and technology. This exacerbates the discriminatory factors which adversely affect the most disadvantaged groups with respect to entry and retention in the labour market. The EQUAL laboratory will therefore seek to turn these risks of discrimination into opportunities for skills adjustment, exploiting the very dynamic nature of the Knowledge Society's own tools.

- **Local development, social development and occupational development** — The EQUAL laboratory will seek to support economic development in the various geographical areas in parallel with human resources and to further specific efforts to reduce social deprivation. In particular, the focus on human resources must be reflected in sustainable local development which can meet the employment needs of the present without compromising the prospects of future generations.

As each of these lines of action is pursued through the thematic fields and operational plans, special attention will be paid to three factors:

- the differences, particularities and divergences characteristic of Italy's different geographical areas (Objective 3 and Objective 1 regions);
- the gender approach, which cuts across the various interventions;
- the special requirements of specific target groups, such as the disabled.

The benefits of such strategy described include:

- action is concentrated on specific policy priorities, chosen from among those proposed in the Communication, depending on the issues of particular national interest;
- these policy priorities take account of the various issues arising in the Objective 3 and Objective 1 areas;
- they are focused on problems for which a particular effort of innovation and experimentation is required.

2.2 Development Partnerships: Role and Nature

The results yielded by Round 1 of EQUAL and by the Mid-term Review show that the partnership principle has proven the most effective vehicle to deliver innovative solutions to the problems of discrimination and inequality encountered by the most disadvantaged groups. Thus in Round 2 the Italian CIP will reinforce the role of the Development Partnerships (DPs), conceived as formally structured partnerships, in which the actors are actively involved from the planning phase and share goals and responsibilities.

Two kinds DPs will be funded:

- The geographical DP has a fairly limited territorial basis, its operating area being no bigger than a subregion. In all events, small organisations must have access and all partners should be involved in its decision-making processes.
- The sectoral DP is so called because it operates in a given economic sector and does not *a priori* relate to any geographical area. The "sectoral" category also covers assistance for specific groups suffering discrimination and inequality in the labour market and action focused on some issue of particular importance in combating such discrimination, exclusion and inequality.

An essential feature common to the two types of DPs is that, to ensure innovation, they must be tailored to the project objectives and mainstreaming activities, which must be anchored in the project philosophy and pursued flexibly and effectively. With respect to the DP composition, it is important that all relevant actors are involved (that is, all the stakeholders necessary to solve the problem being tackled), irrespective of the number of partners.

2.3 Empowerment

Generating innovative solutions to be mainstreamed at policy level cannot be accomplished only by getting the institutional actors involved. The empowerment principle requires that all stakeholders, including the final beneficiaries, be actively involved in the intervention from the outset. This is a key success factor which ensures that the project idea is consistent with real needs.

2.4 Policy Priorities In The Overall Strategy For EQUAL

The Italian strategy for the EQUAL Initiative is geared to combat any forms of discrimination actually encountered in the labour market. In keeping with its thematic approach, EQUAL in Italy will concentrate on five priorities (corresponding to the EES Pillars), within which six thematic areas (so-called Themes). The latter represent the national policy areas chosen within the nine thematic fields identified in the EQUAL Communication to Member States.

Since the Initiative is an experimental laboratory, its added value will depend on its ability to go beyond the NAP and the ESF, establishing new ways of combating discrimination.

The priorities and Themes which make up the Italian strategy are shown below:

Programme structure¹

General objective: *To promote new ways of combating all forms of discrimination and inequalities in connection with the labour market through transnational cooperation. Equal will take into due account the specific needs of the asylum seekers in terms of social and occupational integration.*

Pillar	Thematic field	Theme	Activities which EQUAL supports
Employability	Facilitating access and return to the labour market for those who have difficulty in being integrated or reintegrated into a labour market which must be open to all. Combating racism and xenophobia in relation to the labour market.	Theme A. Creating the necessary conditions to enable the most disadvantaged to enter the labour market Theme B. Preventing the rise of racism and xenophobia	<ul style="list-style-type: none"> • Experimenting with comprehensive pathway approaches for the most disadvantaged groups; • Modernising the provision of guidance and training services making them more flexible, taking into account forms of discrimination which affect the least employable groups; • Promoting new agreements between businesses and local actors to support the social and occupational integration of specific groups, contributing to local development; • Promoting a stable link between the training, employment and welfare systems through the active involvement of the competent services. • • Mobilising the media to raise awareness, inform the public opinion and prevent racism and xenophobia; • Promoting the active involvement of the social and economic actors in the fight against racism and xenophobia in the labour market; • Supporting the development and use of educational methods and tools to promote interculturalism and the social integration of second-generation immigrants.
Entrepreneurship	Strengthening the social economy, in particular the services of interest to the community, with a focus on improving the quality of jobs.	Theme D. Strengthening the social economy, by promoting the sustainability and quality of enterprises and services	<ul style="list-style-type: none"> • Strengthening social enterprises and services by increasing the quality of the services provided and work conditions in the sector; • Creating social enterprises and making them sustainable; • Promoting a stable link between institutional actors and the Third sector in order to support an accountable welfare system and welfare mix.

¹ Under the different Themes EQUAL will also fund activities in favour of the victims of human trafficking and ethnic minorities.

Pillar	Thematic field	Theme	Activities which EQUAL supports
Adaptability	Promoting lifelong learning and inclusive work practices which encourage the recruitment and retention of those suffering discrimination and inequality in connection with the labour market	Theme E. Using lifelong learning to combat discrimination and unequal treatment in the labour market	<ul style="list-style-type: none"> • Developing methods and practice for upgrading human resources in keeping with lifelong learning aimed at countering discrimination and skills obsolescence, with special attention to SMEs; • Experimenting with new methods of skills audit and certification for the most vulnerable workers; • Promoting projects that support local driving sectors and local strengths in order to create new vocational skills so that change can be successfully managed and exclusion from the labour market be countered; • Promoting a lifelong learning environment and testing methods and tools to upgrade the basic skills of employees at risk of being excluded; • Promoting innovation processes between SMEs in order to adjust to changes in the market and production system and to counter the marginalisation of enterprises and consequent precariousness of employees.
Equal Opportunities	Reducing gender gaps and supporting job desegregation	Theme H. Countering vertical and horizontal segregation and promoting new working time policies	<ul style="list-style-type: none"> • Countering vertical segregation and enhancing the female potential in entrepreneurial and organisational contexts; • Countering horizontal segregation, with special attention to reducing the digital divide; • Reconciling family and professional life.
Asylum seekers	Supporting the social and occupational integration of asylum seekers	Theme I. Improving the reception capacity and testing new training approaches for asylum seekers	<ul style="list-style-type: none"> • Delivering informative, awareness-raising and training actions for operators and practitioners in the public and private sector for capacity building purposes; • Delivering short-term assistance and training to support the social and occupational integration of asylum seekers.

2.5 Transnationality

Transnationality is the distinctive feature of EQUAL in the context of the Structural Funds; *"As transnational cooperation is an integral part of the activity of the Development Partnership, the work programme cannot be complete without this element"*². The transnational dimension has a great potential to innovate policy and practice, and its relevance is due to increase with the completion of the enlargement process to ten new Member States.

In Round 2 the principle will be further strengthened by the virtue of the following provisions in the Communication:

- DPs will a) implement the TCA and b) participate in EU level thematic networks, working groups, seminars and conferences;
- Managing Authorities will: a) participate in the above events and groups, either as lead Member States or participating Member States, b) organise events and groups, using their TA budgets.

2.6 Mainstreaming

The Italian strategy for mainstreaming adopts an integrated approach which seeks to strike a satisfactory balance between top-down and bottom-up mechanisms, by activating both pull and push factors. To this end, a variety of actors from the public, private and Third sector will be involved at different stages in the process.

With respect to horizontal mainstreaming, the strategy assigns an unquestionable central role to DPs. These will be expected to contribute to the process of innovation of policies and practice both with their individual partnership work and by participating in national thematic networks and, when required, in European Thematic Groups. Vertical mainstreaming, on the other hand, will be promoted chiefly by institutional actors who will interact with groupings of selected DPs in *ad hoc* fora set up by the Managing Authority and/or the local governments (Regions). Gender mainstreaming, as in the previous Round, will be a cross-cutting feature of the capitalisation activity envisaged for the Round 2.

The mainstreaming process, however, will differ significantly in Action 2 and 3. Action 2 mainstreaming will in fact follow a bottom-up logic. Consequently, DPs will be encouraged to experiment with new solutions in the fight against inequalities in a "spontaneous" way, that is not necessarily influenced by explicit policy demand. Nevertheless, the process will not be entirely implemented at a grass-root level. The expected supply of promising and good practice, in fact, will be systematised by getting DPs regularly involved in TA activities, such as monitoring and thematic networking.

By contrast, the process in Action 3 will be designed to meet policy demand. To this end, the Managing Authority and the Regions will set up mechanisms that ensure that the stock of good practice (the supply side) matches the demand side. Being the main clients of the good practice expected of EQUAL, the Managing Authority and the Regions will be respectively involved in setting up and co-ordinating National and Regional Mainstreaming Committees. Finally, in line with the Communication guidelines, the process will be strengthened in two directions: a) mainstreaming activities will be extended significantly to non-EQUAL actors, and b) the process will open up to transnational co-operation in a decisive way, compared to the past.

3. THE ADDED VALUE OF THE THEMES

Theme A

Creating the necessary conditions to enable the most disadvantaged to enter the labour market

ADDED VALUE

- New approaches to inequalities, adopting a multidimensional method.
- Experimenting with links between the welfare, training and employment systems and with ways of integrating the resources and action of these various systems on a stable footing.
- Getting local actors involved in new agreements for local development.
- Experimenting with new pathways for enhancing the employability of individuals who are particularly disadvantaged on the market, linking up with the employers and the employment services.
- Making the provision of training and guidance more modern and flexible, pursuing greater accessibility and lifelong learning.

² Communication establishing the guidelines for the second round of the Community Initiative EQUAL, Brussels, 30.12.03, p. 13.

Theme B

Preventing the rise of racism and xenophobia

ADDED VALUE

- Promoting new forms of cooperation among the main economic and social actors to prevent racism and xenophobia from arising in connection with the labour market, thus combating the spread of a public perception of the phenomenon based on stereotypes and prejudice.
- Experimenting with new methods and educational for accessing the labour market which strengthen and stabilise dialogue between businesses, the civil society and the educational institutions.

Theme D

Strengthening the social economy, by promoting the sustainability and quality of enterprises and services

ADDED VALUE

- Promoting governance in local development processes.
- Upgrading the organisational and managerial skills of social enterprises staff.
- Making precarious or illegal employment positions transparent and legal.
- Devising funding tools for the non profit sector (so-called "Ethic bank", micro-credit, etc.).
- Adopting a multidimensional approach to social enterprises' sustainability.
- Adopting the partnership principle enabling to deliver actions which take into account multiple dimensions (psychological, social, economic, etc.).
- Upgrading the professional skills in the Third sector, thus meeting the standards of the profit-making sector.
- Social and economic growth of employees within social cooperatives, as well as of end users and other stakeholders.

Theme E

Using lifelong learning to combat discrimination and unequal treatment in the labour market

ADDED VALUE

- Experimenting with new forms of flexibility in the labour market to counter the risks of exclusion and discrimination at work.
- Developing new approaches to promote a lifelong learning environment.
- Experimenting with new forms of accreditation of prior learning, thus making the labour market more transparent.
- Integrating active employment policies and local development policies to combat the exclusion of the most vulnerable employees.

Theme H

Countering vertical and horizontal segregation and promoting new working time policies

ADDED VALUE

- Developing new approaches to countering vertical and horizontal segregation and promoting career pathways which account for the gender approach.
- Promoting new working time and working hours policies to reconcile work/family life, both at personal and policy level.
- Shifting from a woman-centred to a gender-centred perspective.
- Promoting inclusive actions for people at risk of exclusion.

Theme I

Improving the reception capacity and testing new training approaches for asylum seekers

ADDED VALUE

- Joint strategy by the key players from the public, private and voluntary private sectors to support the asylum seekers.
- Creating an integrated information/training system capable of matching demand-side requirements with the resources which can be mobilised in the various local contexts.
- Joint planning which, on the supply side, enhances the activity of the (institutional and other) actors central to the integration process and, on the demand side, facilitates access to local opportunities, thus combating illegality and underground activity and promoting routes out of dependency.

4. MANAGING AND PAYING AUTHORITIES

The Managing Authority as per Article 9 (n) of Council Regulation (EC) 1260/99 is the Ministry of Labour and Social Policies, Ufficio Centrale per l'Orientamento e la Formazione Professionale dei Lavoratori, Divisione IV, Head of Division.

The Managing Authority is the main body responsible for proper management and implementation of the Initiative.

Within the Managing Authority, the payments authorisation and execution functions toward the final beneficiaries or the intermediate bodies are separated.

The Paying Authority as per Article 9 (o) of the Regulation is the Ministry of Labour and Social Policies, Ufficio Centrale per l'Orientamento e la Formazione Professionale dei Lavoratori, Divisione II, Head of Division.

In addition to the provisions of Regulation 1260/99, the functions of the Paying Authority are specified in Regulation 438/2001.

5. FUNCTIONS OF THE MINISTRY OF LABOUR (UCOFPL), THE REGIONS AND THE AUTONOMOUS PROVINCES

To allow the Initiative to be efficiently managed while fully respecting the regional authorities' territorial prerogatives, some of the functions which Regulation 1260/99 assigns to the Managing and Paying Authorities are entrusted to the Regions and Autonomous Provinces. More specifically, these authorities are responsible for:

- Planning activities within the Region;
- determining the specific regional requirements to be included in the call for proposals;
- promoting geographical DPs;
- assessing and approving geographical DPs;
- managing the activities undertaken by geographical DPs;
- verifying the records submitted by geographical DPs upon completion of their work;
- checking the progress of the various activities approved;
- cooperating with the Managing Authority on Action 3.

The Regions and Autonomous Provinces work together with the Managing Authority in drawing up the planning and implementation documents for the Initiative, including negotiating with the European Commission.

The Managing Authority is, however, responsible for the overall coordination of the Programme. The Ministry undertakes directly the management and financial and administrative control of the activities carried out by sectoral DPs, activities carried out by DPs under Theme b) and Theme i), and activities within Action 3.

5.1 Arrangements for the submission of applications for funding

Applications for funding by geographical DPs are submitted directly to the competent regional authorities, while those by sectoral DPs are submitted to the Ministry of Labour.

In order to facilitate data collection and comply with the Community calendar for setting the common European information system (ECDB – EQUAL Common Database), the Managing Authority is responsible for providing and disseminating software applications which allow the drafting of applications for funding. Such tools include data collection forms, references to the rules applying and guidelines for applicants.

The deadlines for submission, selection and start-up of projects are laid down in the national call and reflect the commitments made at Community level by all Member States.

5.2 Monitoring Committee

The implementation of the Initiative is accompanied by a Monitoring Committee.

The Committee is responsible for the efficiency and quality of implementation of the Programme, by carrying out the tasks laid down in Article 35 of Council Regulation (EC) 1260/99, in the Operational Programme and in the Rules for procedure.

The Monitoring Committee meets at least twice per year.

6. TECHNICAL ASSISTANCE

As was the case in Round 1, the technical assistance (TA) strategy is based on three main dimensions: Information, Management, Impact on systems and policies.

6.1 Information

The information dimension is crucial for the outcome of the process leading from the design phase of DPs to the impact of their experimental practices on systems and policies. Information has been a concern from the outset, in the phase preceding the call for proposals, due to the twofold need to ensure transparency toward potential beneficiaries and information to the general public on the Initiative's content and results.

The comprehensive information activities undertaken with the support of the technical assistance are intended to reach the full range of actors potentially interested in establishing geographical or sectoral DPs.

A further component of the information aspect involves supporting DPs finding suitable partners for transnational cooperation. In this respect, the TA has developed the Italian module for the common European information system (ECDB – EQUAL Common Data Base) which provides all parties concerned with on-line information on the DPs selected in other Member States that are interested in concluding cooperation agreements.

6.2 Management

TA supports the Managing Authority in dealing properly with the management aspects of the Initiative. This involves a number of basic steps:

- Applications submission procedure
- Selection of proposals for admission to Action 1 (and subsequent confirmation of admission to Action 2)
- Consolidation of DPs during Action 1
- Proper implementation of Action 2
- Proper implementation of Action 3
- Management of the financial flows
- Monitoring and evaluation, including on-going assessment of the physical and financial progress of the DPs
- Supervision and control
- Circulation of information within the management system.

6.3 Impact on systems and policies

The main purpose of the EQUAL Initiative is to make a real impact on systems and policies (mainstreaming). To this end, horizontal dissemination must be supplemented by a wider sharing of experiments carried out by the DPs; such process, which should start as early as Action 1, should be based on the networking of political, administrative, social actors and practitioners, relevant to the various thematic fields of experimentation.

Thematic networking at European level is an equally important field of activity which involves the European Commission and the other Member States. This will greatly enhance the innovation transfer taking place on a national scale, while at the same time fully exploiting the outputs of transnational work by DPs.

7. INFORMATION SYSTEM

Data management and the establishment of arrangements for data retrieval and processing form part of a wider strategy for the creation of an information system capable of providing support to and enhancing the capabilities of all those involved in implementing or managing the Initiative. This involves tracking current developments at DP and Initiative level and making information available to confer transparency to the management process.

The System comprises:

- A central database maintained by the Managing Authority and accessible to the national and Community management, the DPs, the other bodies which are in various ways involved in implementing EQUAL and the general public;
- A communication infrastructure based on the public network (Internet), using suitable applications to ensure security and data integrity.

FINANCIAL TABLE

Indicative breakdown by priority, including indexation 2001-2006				
Priority	Year	Total	ESF	National co-funding
1. Employability	Total	240.818.884,80	120.409.442,40	120.409.442,40
	2001	36.180.000,00	18.090.000,00	18.090.000,00
	2002	39.964.800,00	19.982.400,00	19.982.400,00
	2003	39.922.800,00	19.961.400,00	19.961.400,00
	2004	40.668.583,80	20.334.291,90	20.334.291,90
	2005	41.625.733,80	20.812.866,90	20.812.866,90
	2006	42.456.967,20	21.228.483,60	21.228.483,60
2. Entrepreneurship	Total	200.682.404,00	100.341.202,00	100.341.202,00
	2001	30.150.000,00	15.075.000,00	15.075.000,00
	2002	33.304.000,00	16.652.000,00	16.652.000,00
	2003	33.269.000,00	16.634.500,00	16.634.500,00
	2004	33.890.486,50	16.945.243,25	16.945.243,25
	2005	34.688.111,50	17.344.055,75	17.344.055,75
	2006	35.380.806,00	17.690.403,00	17.690.403,00
3. Adaptability	Total	216.736.996,32	108.368.498,16	108.368.498,16
	2001	32.562.000,00	16.281.000,00	16.281.000,00
	2002	35.968.320,00	17.984.160,00	17.984.160,00
	2003	35.930.520,00	17.965.260,00	17.965.260,00
	2004	36.601.725,42	18.300.862,71	18.300.862,71
	2005	37.463.160,42	18.731.580,21	18.731.580,21
	2006	38.211.270,48	19.105.635,24	19.105.635,24
4. Equal opportunities	Total	80.272.961,60	40.136.480,80	40.136.480,80
	2001	12.060.000,00	6.030.000,00	6.030.000,00
	2002	13.321.600,00	6.660.800,00	6.660.800,00
	2003	13.307.600,00	6.653.800,00	6.653.800,00
	2004	13.556.194,60	6.778.097,30	6.778.097,30
	2005	13.875.244,60	6.937.622,30	6.937.622,30
	2006	14.152.322,40	7.076.161,20	7.076.161,20
5. Asylum-seekers	Total	24.081.888,48	12.040.944,24	12.040.944,24
	2001	3.618.000,00	1.809.000,00	1.809.000,00
	2002	3.996.480,00	1.998.240,00	1.998.240,00
	2003	3.992.280,00	1.996.140,00	1.996.140,00
	2004	4.066.858,38	2.033.429,19	2.033.429,19
	2005	4.162.573,38	2.081.286,69	2.081.286,69
	2006	4.245.696,72	2.122.848,36	2.122.848,36
6. Technical assistance	Total	40.136.480,80	20.068.240,40	20.068.240,40
	2001	6.030.000,00	3.015.000,00	3.015.000,00
	2002	6.660.800,00	3.330.400,00	3.330.400,00
	2003	6.653.800,00	3.326.900,00	3.326.900,00
	2004	6.778.097,30	3.389.048,65	3.389.048,65
	2005	6.937.622,30	3.468.811,15	3.468.811,15
	2006	7.076.161,20	3.538.080,60	3.538.080,60
Grand total	Total	802.729.616,00	401.364.808,00	401.364.808,00
	2001	120.600.000,00	60.300.000,00	60.300.000,00
	2002	133.216.000,00	66.608.000,00	66.608.000,00
	2003	133.076.000,00	66.538.000,00	66.538.000,00
	2004	135.561.946,00	67.780.973,00	67.780.973,00
	2005	138.752.446,00	69.376.223,00	69.376.223,00
	2006	141.523.224,00	70.761.612,00	70.761.612,00