EQUAL: Paving the Way for Lifelong Learning and Age Management

European Social Fund

EQUAL: PAVING THE WAY FOR LIFELONG LEARNING AND AGE MANAGEMENT

Published in November 2007

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EXECUTIVE SUMMARY

Lifelong learning and age management are two issues at the heart of the European Union (EU)'s policy agenda. As seen in the **European Employment Strategy (EES)**, they play a key role in the EU's ambitions for long-term economic prosperity and social cohesion. The EES Guideline 17, for example, refers to measures for full employment, with a 50% employment rate target for the older population by 2010[1]. And Guideline 23 sets out ways to expand and improve investment in human capital, again with a target for 12.5% of all working-age adults to be engaged in lifelong learning by 2010[2] These guidelines are also echoed in the **new European Social Fund (ESF) Regulation for 2007-2013**, which calls on Member States to develop and implement Operational Programmes (OPs) that promote both lifelong learning and active ageing measures (amongst others)[3]. Against this policy background, where can national and regional governments look for ideas and insights into how to make these measures a reality? What successful examples are there in these areas, ones that can inform the implementation of the new ESF as well as other related initiatives?

Answers to these questions can be found in the **ESF EQUAL** programme. Since 2002, the programme has invested in €3.274 billion in pilot projects across the EU, many of which have focused on lifelong learning and age management issues – with a particular focus on discriminated and disadvantaged groups in the labour market. Moreover, these projects share particular features that make them an ideal source of information and inspiration for the new ESF, namely: **partnership-working**, **innovation** and **transnational cooperation** (all of which are mentioned explicitly in the new ESF Regulation).

This publication has been prepared by GHK Consulting Ltd[4], the contracted experts for the Adaptability pillar of EQUAL. Its main purpose is to present the final results of the EQUAL projects – commonly known as 'Development Partnerships' (DPs) - in relation to lifelong learning and age management, with the view to informing the European policy agenda in these two areas. These results are presented in two ways: firstly, there is a description of the **practical solutions** developed by the DPs, that is the new tools, decisions and approaches that have proved particularly successful and demonstrated good practice; and secondly, these solutions and the associated experiences are 'translated' into a series of **policy messages**, that is recommendations for policy makers (at all levels) drawn directly from the experiences of the projects on the ground.

A summary of the 'practical solutions' and 'policy messages' are presented in the table below.

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[1] The older population being 55 – 64 years.

[2] Council Decision of 12 July 2005 on Guidelines for the employment policies of the Member States, (2005/600/EC).

[3] Council Regulation on the European Regional Development Fund, the European Social Fund and the Cohesion Fund (EC) No 1083/2006.

[4] For further information on GHK Consulting Ltd's preparation of this publication and/or the EQUAL programme, please contact: Helen Tubb: Helen.Tubb@ghkint.com or Toms Feifs: Toms.Feifs@ghkint.com.

Practical solutions	Policy messages
Engaging employers – especially small and medium-sized enterprises	
o Undertaking awareness-raising activities o Training and supporting the senior management o Developing SME-tailored solutions o Using business-friendly concepts and language	o Focusing and sustaining resources to address the problems faced by SMEs in relation to age management and lifelong learning o Promoting diversity and strengthen the implementation of equality legislation in companies o Promoting flexible work organisation and emphasising the quality of work
Developing intergenerational learning	
o Mixing practical experience with up-to-date theory as part of the intergenerational exchange o Identifying and removing the psychological barriers to intergenerational learning o Using intergenerational learning as a way to motivate older workers o Using ICTs to preserve knowledge	o Promoting and supporting intergenerational learning as means to improve business growth and workforce potential o Making sure that intergenerational learning incorporates the initial identification and removal of psychological barriers o Promoting intergenerational learning as a way to retain older workers in employment (as part of the active ageing agenda) o Focusing on creation of a 'healthy' mix of employees from different generations
Promoting social dialogue	
o Defining and designating clear roles to social partners o Involving the social partners in forums and channels for	o Promoting and establishing clear roles for the social partners in the development and communication of lifelong learning and age management strategies and interventions

Practical solutions	Policy messages
communication	o Fostering the cooperation of social partners with organisations that support disadvantaged workers
o Linking the social partners with other strategic organisations	
o Using the social partners to enhance mainstreaming	o Developing social dialogue at the regional level

Developing vocational training

o Targeting and tailoring training schemes towards specific target groups	o Increasing communication and information services and resources related to vocational training
o Increasing access to information on training opportunities	o Setting up a European institution for the centralisation of vocational training information
o Adopting a bottom-up approach in the design and delivery of training	o Increasing research into the suitability of training content and formats
o Integrating personalised and psychological support	

Validating skills

o Identifying existing competences and knowledge	o Favouring bottom-up approaches to skills validation
o Creating tools to empower individuals in validating their own skills	o Supporting the development of systems that combine the capture and management of knowledge with the promotion of learning
o Developing sectoral approaches to skills validation	
	o Raising employers' awareness on the benefits of skills validation
o Developing a common framework for skills validation	
	o Encouraging the use of recognised accreditation systems

Promoting the use of information and communication technologies and e-learning

Practical solutions	Policy messages
o Making ICTs more accessible o Using ICTs to promote social inclusion as a 'stepping stone' to improve employment opportunities o Using ICTs to help employers to effectively invest in human capital o Using ICTs to inform and connect actors and beneficiaries o Blending forms of learning	o Promoting ICTs for the improved centralisation and dissemination of information o Developing adapted structures for increased access to ICTs by marginalised populations o Promoting and support blended forms of learning
Networking (between DPs and other organisations at the national, regional or local level)	
o Making sure that the network involves a wide range of stakeholders o Using the network to collect and disseminate good practice o Using the network to develop strategies at the national and regional level o Linking with national and regional policy makers to enhance mainstreaming	o Promoting and support the establishment of networks linking funded projects with a range of key actors o Investing in networking at the European level o Promoting networking as a means to develop synergies between different funds and initiatives

Four main ideas emerge from the DP experiences:

- o **Target-group tailoring** - Many of the DPs have stressed the importance of considering in detail the needs of the target group and adapting the lifelong learning or age management intervention accordingly. In others word, there is no 'one size fits all' based on false or quick assumptions about the target group. Instead, every tool, method or information package must be developed based on the true and often subtle, psychological issues faced by the target group. These issues can be explored by using bottom-up and investigative approaches such as research, initial needs assessment, surveys, consultation exercises or one-to-one sessions, not only at the beginning but throughout the project intervention.

- o **Getting the 'right mix'** - The DPs have had a strong tendency to mix types of method or individual as part of their overall approach. Examples have included the blending of ICT-based learning with more traditional, face-to-face interventions. There has also been the combination of practical with more theoretical subject matters within the context of intergenerational – which is in itself another mix, bringing together older and younger works to mutually transfer knowledge and skills. There has been an evident mix in the networking experience of the DPs.

  One probable reason for the success of this focus on mixing is that it reflects the multi-faceted nature of the labour market problems in hand. Indeed, identifying what or who works best to address different aspects of the problem and then combining these together means that the solution is far more holistic and integrated.

- o **Being informed** - Easy access to information, particularly at various territorial levels, is a recurring theme amongst the DPs. To address the information gap, the DPs have developed systems to increase the target groups' access to information, on for example, training opportunities or business intelligence. They have also extended their activities as far as awareness-raising - in other words, using strategically chosen and well presented information to raise awareness amongst key audiences, such to policy makers and companies. ICTs have played an important role in facilitating access to information in the form of websites, DVDs, films and virtual networks.

- o **Partnerships and networks** - Partnership and networking principles have proved essential in the achievements of the DPs. The effectiveness and sustainability of the solutions would not have been possible without their collaborative efforts. These efforts have taken the form of strategic and operational alliances between a range of stakeholders, including employers, regional/local authorities, social partners, to name but a few. They have also involved communicating and making links with organisations and individuals who have hitherto been 'excluded' from projects of this type; for instance, various community organisations or indeed the beneficiaries themselves.

  All levels of intervention have been highlighted. At the European level, there is the suggestion of developing a network to link the structural funds, as well as the current development of a European Network on Age Management. Country-wide networks are seen as particularly beneficial in terms of mainstreaming to national policy makers. And there is also the idea of strengthening networks for regional-level social dialogue.

A 'bridge' for the ESF…

These ideas – and the solutions and messages that underpin them - are seen as particularly useful for individuals and organisations engaged in the new ESF. For instance, they can serve as examples of good practice for inspiration to others, or help to identify key organisations for involvement in new ESF projects. And they may help to define the parameters for selecting, assessing and supporting new ESF projects. Overall, it is hoped that the publication will provide a 'bridge' between EQUAL and new ESF actors (as well as other employment actors) so that EQUAL is able to leave a positive and informative legacy for future funding rounds.

1.   INTRODUCTION: WHY EQUAL?

Lifelong learning and age management are two issues at the heart of the European Union (EU)'s policy agenda. As seen in the European Employment Strategy (EES), they play a key role in the EU's ambitions for long-term economic prosperity and social cohesion. The EES Guideline 17, for example, refers to measures for full employment, with a 50% employment rate target for the older population by 2010.[5] And Guideline 23 sets out ways to expand and improve investment in human capital, again with a target for 12.5% of all working-age adults to be engaged in lifelong learning by 2010.[6] These guidelines are also echoed in the new European Social Fund (ESF) Regulation for 2007-2013, which calls on Member States to develop and implement Operational Programmes (OPs) that promote both lifelong learning and active ageing measures (amongst others).[7] Against this policy background, where can European, national and regional policy makers look for ideas and insights into how to make these measures a reality? What successful examples are there in these areas, ones that can inform the implementation of the new ESF as well as employment-related initiatives?

Answers to these questions can be found in the ESF EQUAL programme. Since 2002, the programme has invested €3.274 billion in pilot projects across the EU, many of which have focused on lifelong learning and age management issues – with a particular focus on discriminated and disadvantaged groups in the labour market. Moreover, these projects share particular features that make them an ideal source of information and inspiration for the new ESF, namely:

- o **Partnership-working** (as featured in Article 5 of the new ESF Regulation) – all of the projects are partnership-based and therefore called 'Development Partnerships' (DPs). This approach is based on the principle that the project idea will be far more effective and sustainable if all of the stakeholder organisations (such as regional authorities, employers, social partners and civil society representatives) are actively engaged.

- o **Innovation** (as featured in Article 7 of the new ESF Regulation) – all of the DPs aim to design, test and disseminate new ways of tackling labour market problems - in other words, 'thinking outside of the box' and then sharing these insights with wider groups of practitioners and policy makers.

- o **Transnational cooperation** (as featured in Article 8 of the new ESF Regulation) – each DP is required to form a transnational partnership with one or more DPs in other Member States, thereby exploring problems and ideally jointly developing solutions across national boundaries.

This publication has been prepared by GHK Consulting Ltd[8], the contracted experts for the Adaptability pillar of EQUAL. Its main purpose is to present the final results and messages of the DPs in relation to lifelong learning and age management, with the view to informing the European

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[5] The older population being 55 – 64 years.

[6] Council Decision of 12 July 2005 on Guidelines for the employment policies of the Member States, (2005/600/EC)

[7] Council Regulation on the European Regional Development Fund, the European Social Fund and the Cohesion Fund (EC) No 1083/2006

[8] For further information on GHK Consulting Ltd's preparation of this publication and/or the EQUAL programme, please contact: Helen Tubb: Helen.Tubb@ghkint.com or Toms Feifs: Toms.Feifs@ghkint.com

policy agenda in these two areas. The information has been structured according to six 'transversal' themes, mirroring those of the final European conference on EQUAL Adaptability:[9]

o **Engaging employers - especially small and medium-sized enterprises (SMEs)**

o **Developing intergenerational learning**

o **Developing vocational training**

o **Validating skills**

o **Promoting social dialogue**

o **Promoting the use of information and communication technologies (ICTs) and e-learning**

o **Networking (between DPs and other stakeholder organisations at a national, regional or local level)**

Each of these themes is presented in two ways:

o Firstly, there is a description of the **practical solutions** developed by the DPs, that is the new tools, decisions and approaches that have proved particularly successful and demonstrated good practice.

o Secondly, these solutions and the associated experiences are 'translated' into a series of **policy messages**, that is recommendations for policy makers (at all levels) drawn directly from the experiences of the projects on the ground.

It is very much hoped that both these solutions and messages will serve as useful information and inspiration for actors working in the fields of lifelong learning and age management.

2. ENGAGING EMPLOYERS – ESPECIALLY SMALL AND MEDIUM-SIZED ENTERPRISES

2.1. PRACTICAL SOLUTIONS

Undertaking awareness-raising activities

The first step for any DP aiming to engage employers has been to work on changing attitudes and perceptions through a variety of awareness-raising activities. Successful measures in this field have been developed in relation to both lifelong learning and age management.

In relation to age management, research undertaken by a number of DPs revealed the existence of enduring prejudices, as well as discriminatory practices by companies towards older workers. To address the results of this research, the DPs have developed specific awareness-raising activities targeted at employers. For instance, *Carlow EQUAL Employment Programme* (Ireland) delivered half-day **diversity awareness training** sessions to nearly 150 individuals from organisations and business sectors in County Clare. As a complementary instrument and a means of continuing this training into the future, a DVD entitled 'Living and Working in a Diverse Ireland' was developed. This DVD served as a training and induction tool, aimed at a vast

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[9] The conference is entitled 'Anticipating Change: effective approaches for lifelong learning and age management' and was held on 6 and 7 December 2006 in Athens, Greece. It was organised by the Greek Ministry for Employment and Social Protection, supported by DG Employment, Social Affairs and Equal Opportunities and GHK Consulting Ltd.

audience, including employers, employees, consultants, trainers, students, schools, etc. It had a corresponding **on-line version which offered individuals the opportunity to obtain a nationally recognised foundation certificate in diversity awareness** through FETAC, the awarding body for further education and training in Ireland.

> *"This product is innovative in that it not only increases awareness of diversity, but it is available in multiple languages and offers certification to those who successfully complete the training which can be done in their own time and at their own pace,"* explains Orlaith McHugh, Programme Coordinator.

Discussions with national training bodies, employers and employer representatives, enterprise boards, chambers of commerce and trade unions are underway regarding the dissemination and mainstreaming potential of this tool at both a local and national level.

Similar problems with employers have arisen in relation to lifelong learning: many DPs agree that one of the main issues to address is the lack of awareness and knowledge about the benefits of training, for instance in ICTs. The **Argumentary on Professional Training** elaborated by the transnational partnership *E.N.T.E.R.P.R.I.S.E. for Europe* is a strategic approach to raise awareness among SME managers about the need for professional training. The website's aim is to debunk the commonly cited disadvantages of training and to promote the importance of planning the development of the workforce in SMEs. It does this by presenting a set of arguments in favour of professional training, highlighting the positive impact in terms of organisation performance for instance – hence the name 'argumentary'. The tool is highly interactive and collects comments and arguments from voluntary contributors; it also contains a section on good *and* bad practices collected across a range of countries.

> As the partners highlighted, including bad experiences was a conscious choice: *"We thought it was important to include bad practices because we learn more from them than good practices!"*

Training and supporting the senior management

A number of DPs have developed specific tools and training to help employers implement age management and lifelong learning strategies. This has included the development of training for managers, in other words to develop the capacity of managerial staff to put age management policies into practice (in the field of recruitment, appraisal and selection, work-life balance, working time, human resources etc). As well as developing knowledge and skills, the training has also explored the attitudes and perceptions of the managers, thereby helping to develop an inclusive workplace in a range of ways.

The *FENIX* (Spain) and *Carlow* (Ireland) DPs observed particular benefits in **combining consultancy services with training measures**. The *FENIX* DP helped a selection of 24 companies in the social economy to improve their competitiveness by offering (over an eight month period) training and consultancy on issues like innovation, management of change, internationalisation, business strategy and competence improvement. *Carlow EQUAL* (Ireland) carried out equality reviews in three different types of organisations across the county. These reviews examined and highlighted areas where equality outcomes could be improved in the workplace and diversity better accommodated amongst the workforce. This process supported a companies in their efforts to retain skilled staff, attract customers from a more diverse base and become an employer of choice for new recruits. Another result of this DP was the creation of a **Postgraduate Diploma in Equality and Diversity in the Workplace**, developed in cooperation with Carlow College. This unique post-graduate programme was aimed at experienced human resource practitioners, supervisors, managers, consultants and community workers to provide them with the knowledge, competence and skills to work effectively as equality and diversity officers within their workplace or organisation.

Some DPs have chosen to focus on the issue of health at work. *FAIRPlus* (Germany) operating in the Nuremberg region, for instance, developed **training courses for managers, aimed at changing their perceptions of health at work** and the way they viewed their older staff. The training focused on keeping the staff healthy at work by shifting the focus of the management

towards identifying the way, reasons and factors contributing to a more healthy and longer work life.

Developing SME-tailored solutions

The particular needs of smaller businesses have been recognised by many DPs that have developed **measures specifically targeted at SMEs**. The capacity of smaller companies to adapt is limited in comparison with larger companies – who typically possess more advanced human resource departments and organisational resources. The transnational partnership *E.N.T.E.R.P.R.I.S.E. for Europe* developed a range of innovative and effective interventions for SMEs, such as **Online Checks** (to self-assess the performance of the company in various areas) and a **Manual on E-learning** to help them enhance their skills base. Similarly, the German National Thematic Group on Lifelong Learning developed **Early warning Systems** for SMEs, that is, a toolbox of IT-supported tools that can be used by SMEs without outside personal support. In terms of practical use, the early warning systems were adapted to the concrete needs of SMEs in the field of lifelong learning.

The aim of the *TEP EQUAL Elderly* DP (Austria) was to provide employers – and especially SMEs - with useful, practical tools that they could use by themselves, without the need for external consultants. The DP started by working with the SMEs to promote the potential of their elderly workers and identify the necessary instruments and methods to capitalise on this potential. They then went on to develop **Elderly Plans** in close co-operation with the enterprises, covering education, training needs, corporate culture, workplace, work hours, the client base of the company and the specific situation of the company concerned. Thanks to the DP's holistic approach - encompassing corporate culture, recruitment policy, human resource development, work scheduling, health and ergonomics – the SMEs were able to develop structures enabling their elderly workers to remain employable until their mandatory age of retirement. It is also worth noting that the DP drew on the experience gained from the successful implementation of the 'Diversity Plan' within the framework of Flemish employment pacts. It is, therefore not only an example of effective co-operation within Austria, but even across Europe.

The provision of support to SMEs at local level is a very effective solution as it removes the principal barriers faced by the companies operating in remote regions: the distance from major centres of development and training opportunities. The EQUAL DP *New chance for transnational job market and economy in the Euroregion Nysa* (Poland), for example, has developed a **network of local Consultancy Service Points**. These points provide a wide range of services to SMEs: legal and administrative consulting, information on national and European projects supporting SMEs as well as vast choice of training courses. Another service provided by the partners is the mapping of SMEs' training needs (both of employers and employees). This mapping, performed by tutors, enabled the visualization of the lack of skills within the SME and the subsequent set up of tailor-made training paths/programmes. The Consultancy Service Points provided SMEs with a variety of training courses that could be delivered in the workplace or even via Internet. About two hundred entrepreneurs of Zgorzelec district have been consulted and several training sessions have been organized so far by the Consultancy Service Points set up by the project.

Using business-friendly concepts and language

A key challenge for the DPs has been to find the right approach to engage employers on the issues of age management and lifelong learning. Convincing companies, in particular SMEs, to adopt inclusive employment policies or lifelong learning strategies has proved extremely difficult. However, the DPs have been successful in overcoming these problems in a number of ways. Above anything else, it is important to use **concepts that are not too far from the company's daily concerns**; ultimately, it is a question of communicating the commercial benefits of adopting age management and equality policies in a clear and meaningful way.

The *Carlow EQUAL* DP (Ireland) recognised early on that addressing the age management topic with employers could be seen to presume that the organisation was deficient in some way - which in turn could lead to a negative response.

"Age Management is very difficult to address as a stand alone topic, it is more effective to incorporate this issue into the broader spectrum of diversity Management," explains Orlaith McHugh.

The DP's approach was successful in showing employers how they could benefit from developing policies and training staff on issues surrounding equality and diversity. The key tangible results for companies going through the process of the equality reviews and training programmes, such as a Hotel in Carlow, were quickly visible to managers: lower staff turnover, better managerial skills, increased employees' satisfaction and ultimately higher productivity.

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

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

Their approach focused on the very concrete problems of companies (qualification of their employees, change of management techniques etc) through personalised, tailored Elderly Plans which tackled one particular problem in each company. An effective argument used by the DP to take companies on board was the **'knowledge transfer' argument**, the fact that the knowledge of elderly workers is very precious and that this knowledge will retire with them if nothing is done to and transfer this knowledge. In terms of human resource management, the DP put forward the argument that 'a good enterprise is made of three generations' – so that employees do not all retire at the same time and that there is a good knowledge flow.

2.2. POLICY MESSAGES

Policies should…

…focus and sustain resources to address the problems faced by SMEs in relation to age management and lifelong learning

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SMEs have too often been neglected in the provision of support and resources to effectively address lifelong learning and age management issues. They lack the time, capacity and expertise to elaborate adequate human resource strategies and actions. Many DPs emphasised that there should be a stronger focus on SMEs in the ESF and national policies, as well as more discussion on their needs and problems.

Sustaining financially the approaches that have been developed with SMEs is crucial. The comprehensive services offered by the DPs are usually provided for free and SMEs could not afford them at market price. Therefore funding to support this type of initiatives is essential. Big companies can pay for human resource consultants, but SMEs need *affordable* support.

…promote diversity and strengthen the implementation of equality legislation in companies

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Support, training and awareness-raising on diversity should be increased and supported. Diversity should be emphasised, not only to include ageing workers, but also to take into account the fact that our society is becoming more diverse in general. The change should also start in the way schools, companies, and all institutions deal with diversity and awareness-raising. It is important for companies to recognise that a diverse workforce is a major asset to their company as it can greatly expand a company's target markets.

…promote flexible work organisation and emphasise the quality of work

Policies related to flexibility, work organisation, hours of work are essential to encourage employees to work longer, and to take part in lifelong learning. There needs to be changes in the way training is currently delivered to employees, which too often deter people from taking part in training because of their lack of flexibility. For women over forty with childcare responsibilities, this is even more crucial. Equally, flexible work organisation should be promoted more actively.

3. DEVELOPING INTERGENERATIONAL LEARNING

3.1. PRACTICAL SOLUTIONS

Mixing practical experience with up-to-date theory as part of the intergenerational exchange

Intergenerational learning can take several forms. Those apparent within EQUAL have been focused on a specific type of company or sector, or between researchers and practitioners. A key element of this learning has been the aim of combining practical and theory-based learning, across the generations.

On the one hand, older workers often lack up-to-date skills or certified knowledge, but nevertheless have long-standing experience in a particular job or work field. On the other hand, younger staff may lack experience, but they have certified skills and academic knowledge. So in many enterprises and industries a **sharing of knowledge that combines the practice and theory** can result in more competent personnel, improved productivity and competitiveness. This is demonstrated by the activities of the *InnKoop* DP in the Chemnitz- Zwickau region (Germany), which worked to retain, retrain and return senior mechanical engineering and IT workers to the labour market by developing new ICT-based intergenerational learning methods. These methods were particularly applied to SMEs.

> Mr. Rene Trommer representing this DP emphasised that, *"Intergenerational exchange offers new possibilities of on-the-job learning and task-specific advanced training processes. Beside the technical qualifications, this form of education offers the potential to improve the cooperation between generations and the development of common social competences."*

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

Identifying and removing the psychological barriers to intergenerational learning

As illustrated by the examples of *InnKoop* and *RITA*, the benefits of intergenerational learning may be considerable. However, there are psychological challenges to be overcome in an exchange of knowledge and experience between the generations; these are often founded on the negative stereotypes associated with age, feelings of alienation and intergenerational rivalry. This is especially true when the people represent not only different generations in an enterprise, but also different 'worlds' – academics and craftsmen, as in the case of *RITA* DP.

> Mr. David Gago, the spokesperson for the *RITA* DP, underlined, *"The DP's work with older workers was particular as the representatives of the traditional industries were afraid to join the project. They had no previous contact with and confidence in academic circles."*

According to Mr. Gago, it was the **participation of two artisan associations** in the DP that played the necessary role of linking the university and the artisans working in rural areas. The DP also relied on the **good word spread by the artisans** participating in the project to involve other traditional producers in its activities.

Other successful approaches can be found in *InnKoop*. This DP showed that the **involvement of the workers themselves in the development of the training content and its delivery** was a strong motivational factor – it directly helped the people of various ages to overcome the social barriers to participation. Moreover, both DP representatives noted that intergenerational learning through training was **more effective if the skills acquired could be directly applied to the workplace and the learning was based on existing knowledge.**

Using intergenerational learning as a way to motivate older workers

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In an age characterised by skills shortages among qualified workers, the validation of the knowledge and competences of older workers is becoming crucial for the survival of an enterprise or industry as a whole.

> This is affirmed by Mr. Trommer from *InnKoop* DP: *"Almost one third of employees in the mechanical engineering and the IT sectors in the Chemnitz- Zwickau region are older than 50 years, 51 % of all employees in the named industry branches are older than 46 years. The extreme decline in the number of engineering students after the 1990s as well as the emigration of specialists has resulted in a shortage of young and skilled personnel in the region. However, a large number of older specialists are unemployed and many of them are long-term unemployed. These resources need to be revitalised for the benefit of the regional economy through qualification and intergenerational cooperation measures."*

To this end, intergenerational knowledge and experience exchange can be employed as a means to motivate older workers to remain in employment for longer or to encourage them to start their own businesses. For many older workers, the **emotional rewards are often more important than the financial benefits in terms of their decision to remain in or return to the labour market after they have reached retirement age.** Seeing this potential, *InnKoop* DP promoted a better inclusion of older workers through an emphasis on providing them with the possibility to share their valuable experience and skills. The training methods developed by the DP were highly suitable for the target audience as they combined the knowledge of younger employees with the experience and know-how of older workers in the business process – via apprenticeship-based training, as well as in measures adapting the workers for possible new occupational fields. The work of *InnKoop* generated three types of outcomes: increased flexibility, employability and adaptability of older workers in SMEs; 90% of the unemployed people who participated in the training secured employment, while the up-skilling within enterprises also created new jobs.

Using ICTs to preserve knowledge

Preserving the knowledge and the practical skill in the companies and the sectors with an ageing workforce is becoming increasingly challenging. A number of EQUAL DPs have been working with this issue both on the national and international levels.

For example, the transnational partnership *EUNETYARD* united Greek, Finnish and Italian DPs in actions targeted at solving the problems of employees in the shipbuilding and repair industry by facilitating communication within the shipyards, improving the soft skills of employees and ensuring the intergenerational transfer of knowledge. The shipyards in these Member States were facing surprisingly similar problems of an ageing workforce and increasing international competition. The work of the transnational partnership therefore focused on the exchange and development of innovative skills transfer and training methods, the exchange of experience in worker safety and occupational health, and the development of efficient tools to increase the employability of workers in shipbuilding and repair sectors. The older workers in shipyards had a lot of expertise and knowledge concerning the issues of occupational health and safety, which were so far not recorded or valorised. The transnational partnership developed the **Tacit Knowledge Transfer Model** – a tool to be used for intergenerational learning – including a methodology for the formalisation of tacit knowledge by turning it into explicit knowledge so that it can be shared more easily. The *EUNETYARD* partnership also created an innovative ICT tool for the intergenerational transfer of knowledge, which records the precious, tacit knowledge and ensures that this can be passed on to younger workers presently and in the future.

3.2. POLICY MESSAGES

Policies should…

…promote and support intergenerational learning as means to improve business growth and workforce potential

When tackling employment and business issues, intergenerational learning is not immediately seen as a possible solution; more 'traditional', age or seniority-specific training interventions are often used and the benefits of intergenerational learning go neglected. Indeed, older workers usually have profession-specific technical or soft skills, while younger workers possess up-to-date qualifications and knowledge. As shown by EQUAL, the mix of these competences may produce growth for the enterprise and employees alike increasing their competitiveness, productivity and creativity.

…make sure that intergenerational learning incorporates the initial identification and removal of psychological barriers

The relationships between generations within an enterprise or between various sectors may be characterised by intergenerational rivalry, differing values, communication differences, as well as stereotypes and fears resulting from a lack of knowledge and personal contact of the age group concerned. The mix of people from different generations and professional fields may in itself result in the reduction of these stereotypes; however the initial stages of this cooperation often requires the help of professional mediators, involvement of the representing organisations and more empowerment-based approaches.

…promote intergenerational learning as way to retain older workers in employment (as part of the active ageing agenda)

Providing the older workers with flexible and emotionally gratifying employment or training possibilities can be a way to retrain or retain them in employment for longer. Such measures may also encourage the return of senior specialists to the labour market and lead to business start-ups. Intergenerational learning can play an important role in these measures and the wider active

ageing agenda – insofar as it motivates older individuals by valorising and finding practical applications for the experience and know-how that they possess.

…focus on creation of a 'healthy' mix of employees from different generations

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Intergenerational learning cannot take place if either of the age groups is not represented in an enterprise, industry or a sector. A 'healthy' mix of employees of all ages is a basis for the long-term sustainability and creative potential of any enterprise. This mix also facilitates the move towards more 'complete' skills-sets for employees and more competitive enterprises. The experience of older workers may be of particular value in the development of products and services for the so called 'silver economy'.

4.   PROMOTING SOCIAL DIALOGUE

4.1. PRACTICAL SOLUTIONS

Defining and designating clear roles to the social partners

The participation of social partners in the development of lifelong learning and age management strategies has been a notable strength of the DPs. The latter have understood that communication with and between social partners can be extremely helpful: social partners have direct in-roads into companies and workers, and are thus indispensable actors in achieving sustainable results. Moreover, to effectively engage these actors, it is important that they have clearly defined and designated roles.

Some DPs have decided to **validate the roles and functions of the social partners that have already existed on the ground.** The *HIGH ROAD* project (Great Britain), for example, worked to further develop the role of (Trade) Union Learning Representatives (ULRs) already established by the Labour government in 1997. The main function of the ULRs was to promote learning in the workplace, support employees, as well as find learning opportunities for the most vulnerable workers. ULRs provide their colleagues with advice on learning, help in identifying learning needs, and arrange training and consulting with employers. *HIGH ROAD* understood that these URLs could play a vital role in the development of lifelong learning on the workplace within the context of EQUAL. The project thus developed training and information packages to develop the skills and knowledge of the ULRs. The DP also strengthened the role of the ULRs by developing **'learning agreements'** with employers; these agreements set out the formal arrangements for the ULRs to have paid time off to conduct their duties and attending training courses.

On the other hand, some DPs have decided to **create new profiles for social partners**. The *ADAPNA* DP (Spain), for example, developed a new profile for social partners within SMEs, called 'PESIs' (environment, health and safety and equal opportunities points). These PESIs were essentially trade union representatives whose role was to provide training to SMEs on themes such as equal opportunities, environment, health and safety and labour risks. The ultimate goal of this training was the improvement of the working conditions within the SMEs concerned.

Involving the social partners in forums and channels for communication

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The direct involvement and backing of social partners to effectively spread the messages directed at companies and workers is absolutely critical. For example, this approach was developed by the *Ageing at work – from talk to action* DP (France), which worked with social partners to gain the support of employees on the age management measures and policies to be undertaken. According to the DP, the trade unions were an ideal **channel to reach employees and promote a change of attitude**.

>   As Aslaug Johansen, coordinator of the project, put it, *"The key success factor of the DP was to get social partners on board. The strategy adopted was successful in*

convincing the social partners that this would be a win/win project. It certainly took a long time and energy to convince them to get on board for such a project. However, it is worthwhile considering the real impact that social partners can have on employees and employers."

Similarly, the DP *Alliance for Work* (Poland) managed to create a multi-dimensional **forum for communication** involving the main Polish trade unions and employer organisations to discuss how to introduce age management strategies within companies that previously had a traditional approach to older workers. Discussions were subsequently conducted between the social partners and employers to illustrate the benefits of keeping the over 45s in employment. This forum was particularly important and striking in Poland given that it is a country that does not have a long history of social collaboration and dialogue.

Linking the social partners with other strategic organisations

The DPs have not only developed a number of successful approaches to promoting and sustaining social dialogue between social partners, but also by creating interesting synergies with other strategic partners such as non-governmental organisations (NGOs) and organisations working with disadvantaged groups. These synergies have proved effective in developing a more holistic and integrated approach to lifelong learning and age management measures.

Some DPs have built links between the social partners and organisations specialised in supporting vulnerable workers. This is the case of the *HIGH ROAD* DP (Great Britain), which linked the work of the trade unions with the activities of organisations dealing with the unemployed and disabled. An example of one such link is the creation of **Disability Champions**. These champions were trained union activists who, amongst other things, negotiated 'reasonable adjustments' for the disabled in the workplace and raised awareness of disability issues. They were thus well-placed to help the disabled employees take their first steps into learning.

> As explained by Joe Fearnehough, coordinator of *HIGH ROAD*, *"By working together, trade unions and third sector organisations can share good practice, call on specialist expertise and provide a continuity of support to individuals."*

Similarly, the DP *Alliance for Work* (Poland) created synergies between the trade unions, employer organisations and two NGOs supporting equal opportunities for women (Centre for Women Rights and League of Polish Women). The **social partners and NGOs developed together a re-integration method** that involved training and supporting the over 45s to become 'job coaches'. These coaches would then go on to provide career guidance and support services to other older workers (with a specific focus on women). This cooperation led to an increased employability of older women in the Łódź region.

Another approach taken by the DPs is the insertion of social dialogue within a regional perspective, in other words, the development of synergies between social partners and key regional actors. The *GESSCANT* DP (Spain), for example, set up a **territorial network** by involving the social partners as well as the regional government and the main institutions working for the regional development of Cantabria. These partners worked regularly together within a mini 'social forum' for the region, participating in the project steering committee and sharing responsibility for organising the training sessions for SMEs and workers affected by restructuring. The synergies developed by these partners produced a visible change to labour relations in the Spanish Cantabria region and fostered the adaptability of the most vulnerable companies and workers. Through the organisation of **seminars and courses**, the project succeeded to provide the smallest and most fragile of companies in Cantabria with the right tools and help them to adapt to the latest changes: new technologies, globalisation, international competition, consumer needs and modifications in labour organisation.

> As Asun Buil from the ORECLA Foundation (an organisation specialised in social conflict mediation in Cantabria), commented, *"The seminars organised by GESSCANT were an important tool to foster not only one's knowledge of change*

management, but also to start up a constructive dialogue between social partners, companies and workers."

Using the social partners to enhance mainstreaming

Social partners are actors who are particularly well placed to reach public authorities at the national level, thanks to their involvement in tripartite Commissions (trade unions, employers association and government representatives). Moreover, trade unions and employer organisations often have a trans-sectoral structure and are therefore able to directly reach a wide range of companies and workers. For this reason, the involvement of social partners is particularly important when it comes to mainstreaming the lifelong learning and age management approaches that the DPs have successfully developed.

The purpose of the *Ageing at work – from talk to action* DP (France) was to launch a **program of training and awareness-raising** for the social partners on the topic of 'ageing at work'. The ultimate objective of this project was to 'equip' the social partners so that they would have a sound knowledge and understanding of the issues at stake (based on the EQUAL experience) and therefore better placed to take part in the negotiations concerning their firms. Thanks to the DP, the social partners are now better aware of the reasons why people do not want to stay in work and are primed to propose concrete measures to remedy these problems to policy makers.

Another benefit of developing social dialogue within EQUAL is that trade unions and employer organisations are able to directly **influence a wide range of sectors and different categories of workers**. This is illustrated by the *ADAPNA* DP (Spain) which transferred the PESI model to other regions in Spain. Thanks to the national outreach of the two major trade unions (UGT and CCOO), the model could be mainstreamed to the regional branches, thereby ensuring the lasting and wider impact of the EQUAL DP beyond the lifetime of the funding itself..

4.2. POLICY MESSAGES

Policies should…

…promote and establish clear roles for the social partners in the development and communication of lifelong learning and age management strategies and interventions

Social dialogue is a key factor in the implementation of lifelong learning and age management strategies. Policy makers have to bear in mind that the direct contact of social partners with companies and workers is essential in order to achieve solid and permanent results. In this respect, social partners can work (with policy makers and other strategic actors) to change the attitude and mentalities of both employees and employers. This means adopting a much more bottom-up approach.

…foster the cooperation of social partners with organisations that support disadvantaged workers

Dialogue is particularly beneficial when it involves not only trade unions and employer organisations, but also other organisations such as NGOs or associations supporting disadvantaged groups such as women, older workers or the disabled. The EQUAL DPs have shown that this type of cooperation is particularly successful as it leads to a deeper understanding of the needs and issues affecting vulnerable individuals in the labour market, and means that the (jointly developed) solutions are more fruitful and sustainable.

…develop social dialogue at the regional level

Social dialogue has proved to be particularly effective when developed at the regional level. Currently, Member States are devolving more and more competences to regional authorities especially in the field of employment and industrial relations. Moreover, the new ESF will be implemented in particular regions based on the principle of 'concentration.' This is why developing a regular dialogue between social partners at the regional level should be a central focus. As the EQUAL DPs have shown, good results can be obtained when 'Social Dialogue

Boards' or 'Forums' are formed to develop region-wide strategies and approaches to lifelong learning and age management.

5. DEVELOPING VOCATIONAL TRAINING

5.1. PRACTICAL SOLUTIONS

Targeting and tailoring training schemes towards specific target groups

The DPs have demonstrated clear benefits in focusing and adapting vocational training to suit specific, disadvantaged groups. This approach has ensured that the needs and circumstances of the individuals are fully addressed in terms of the course content (the skills and knowledge being taught), as well as the practical and psychological issues pertinent to the target group concerned. Moreover, the approach has given a sense of belonging to the training scenario; in other words, individuals do not feel 'alone' or different from the other participants.

A useful example concerns the training provision for **older workers**. This particular target group can often lack the skills required to adapt to labour market changes and the spread of new technologies. In addition, they may have negative experiences of learning (at school in particular) and/or a general lack of confidence, for instance following redundancy or extended periods of unemployment. The *FAIRPlus in the Nuremberg Region* DP (Germany) addressed these issues by developing the **'A.QUA' (Age-suitable qualifications)** to help older employees to develop their skills and improve their employment prospects. The training leading to this qualification was particularly innovative insofar as it did not follow the "*widespread and common conservative form of training",* as described by Uwe Elsholze. Instead, it was directly based on the older workers' previous experience. Feedback from the A.QUA participants was particularly positive in this respect; they reported that the experience-based approach allowed them to clearly see how, during the training, their experience could form a solid basis for their career progression.

Another example relates to **women** who are facing difficulties in re-entering the labour market: following, for example, maternity leave. In such cases, their skills may be out-of-date, they feel 'detached' from the labour market and have childcare considerations. The *Silver Heads Club* (Slovakia) targeted women wishing to return to employment after a long period of absence (three years per child on average). The DP specifically focused on **training in 'communication in a working environment' and the use of new technologies**. These two training areas were seen by the DP as being particularly important for women as a target group; having been away from the workplace (on maternity leave) for a long while, they were lacking the skills and confidence to engage in a work setting.

Another example is the *FENIX* DP (Spain) which focused on social economy businesses in the Andalusia region that were particularly vulnerable to economic change and lacking in competitive organisational cultures. Women were seen as a target group that could help these businesses to flourish. However, their potential could not be maximised because strong family-orientated traditions were preventing them from reconciling work and family lives. The DP therefore addressed this problem by undertaking research which identified that women were in particular need of negotiation and leadership skills (similar to their findings in relation to older workers). As a consequence, the DP went on to develop and deliver a **training programme in these skills, specifically tailored for women and the social economy sector**.

Increasing access to information on training opportunities

Access to information has been a common feature of DPs. Quite often, both employed and unemployed people do not know what vocational training is available to them and how it might boost their employment situation.

The *Navigator* DP established a **support centre** to respond to industrial restructuring in the Greek shipbuilding sector. The support centre provided a wide range of information on vocational training opportunities, as well as pension and insurance schemes, job offers, application support

and business start-up advice. When the centre was established, the DP ensured that all of managers and workers were informed of its existence; indeed a cascade approach was used to ensure that all staff, including shift workers, were aware about the services on offer. According to the DP, this **outreach approach** to information-giving secured an easier acceptance of the project by the target group.

Information is also crucial in **reassuring the target group and encouraging them to engage in vocational training.**

> As Mr. Joe Fearnehough, the representative of the *HIGH ROAD* DP (UK) put it, *"Good quality information, advice and guidance helps ensure people who may have had bad experiences with learning find courses which are appropriate, and thus begin a virtuous cycle of positive engagement with learning."*

The DP developed the **'Union Learning Climbing Frame'**, an electronic tool for ULRs and others who work with learners. In essence, the Frame provided a 'one-stop shop' providing up-to-date information on a broad range of learning opportunities; enabled the development, review and update of a learner's action plan; and allowed the ULRs to keep an ongoing record of whom they had worked with.

The *FAIRPlus* project (Germany) took a slightly different focus by publicising its vocational training programmes to employers. The reason for this focus was that the DP observed that companies, firstly did not know what programmes existed, and secondly had a tendency to ignore the fact that their older workers were eager to take part in training sessions. By providing information in the form of **workshops and meetings**, *FAIRPlus* therefore played the role of intermediary between the two groups, letting them exchange needs and expectations.

Adopting a bottom-up approach in the design and delivery of training

A critical success factor in the design and delivery of vocational training has been the emphasis on the bottom-up approach and empowerment. Solutions that directly involve **beneficiaries as a 'joint partner'** rather than an end-user tend to be far more relevant, beneficial and sustainable. A good example here is the *FAIRPlus* DP, which adopted a particular approach to developing training by including older workers in the creation of the training methodology and delivering the training with the actual experience and specific requirements of older people in mind. This approach proved instrumental for the DP in getting the older workers to engage in the training activities that were ultimately put on offer.

Other techniques have been used by DPs to foster **empowerment** and ensure more focused vocational training, responding to the concrete needs of the beneficiaries. The *HIGH ROAD* DP (UK), for example, wanted to create new learning opportunities for workers. For the DP, the focus on the beneficiaries' abilities and needs was crucial.

> Mr. Fearnehough from the *HIGH ROAD* DP explained, *"The projects work best when they focus on what people can do, rather than what they can't, which only reinforces feelings of failure."*

Furthermore, the methodology of the DP was developed on the basis of a **Skills for Life Survey** commissioned by the UK Department for Education and Skills. This survey identified significant numbers of people with low literacy levels associated with socio-economic deprivation, as well as gaps in ICT skills. Thanks to this survey, the DP was able to define and understand in far greater detail its primary target group (as in low skilled workers or workers at risk of losing their job) and go on to design its training provision accordingly.

Integrating personalised and psychological support

When going through a period of change, people often face a twofold challenge to remain or reintegrate into the labour market: on the one hand, insufficient skills and qualifications, and on

the other, psychological issues, such as personal anxieties, fears and issues of confidence. Personal training and psychological support therefore play a significant part in addressing these challenges. And this is exactly what the *Silver Heads Club* DP (Slovakia) focused on. This DP enhanced the self-esteem and confidence of the target group as a basis for them to feel comfortable in undertake vocational training. More specifically, their programmes included **sport and hobby-type activities** (such as silk painting, woodcarving or the creation of a dance society), which enabled the participants to gain confidence and socialise with each other. The programmes also included specific sessions with a **psychologist**, thereby giving participants the opportunity to discuss their concerns and difficulties (both personal as well as professional). These programmes proved particularly effective insofar as the participants were able to evolve and undertake training with people in similar situations. The above-mentioned *Navigator* support centre also provided an 'industry psychologist'. This person worked closely with the workers' families at the same time as dealing with issues that arose between the shipyard workers.

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

Another interesting example is *In Motion* DP (Austria) which emphasised the importance of communicating with beneficiaries to determine their specific needs and concerns. The DP used a telephone-based system of counselling – **'Info-hotline'** – which was supported by a team of counsellors, all of whom were specifically trained to ensure a high quality of service. The success factor of this hotline was that it was able to tailor the advice and support given, and provide beneficiaries with the assurance of **anonymity** – something critical to put them at ease.

5.2. POLICY MESSAGES

Policies should…

…increase communication and information services and resources related to vocational training

Too many people, both workers and employers, are still unaware of the vocational training opportunities that exist. A stronger emphasis on communication and information provision would address this problem. This provision could be enhanced even further if it was targeted at specific groups, such as older workers, women or migrants, for example, by being offered in familiar surroundings or through outreach actions.

A lack of funding can often be a barrier to accessing information. For example, the DPs have reported having insufficient funding to purchase the necessary materials (e.g. to produce leaflets or handbooks) or to expand their activities. Increased investment in this area would significantly improve this situation.

…set up a European institution for the centralisation of vocational training information

Linked to the above policy message, a collaborative effort from all Member States is needed to increase access to information. Centralisation via a European institution is particularly recommended. This institution would serve as a European reference source for workers and employers interested in vocational training related projects, as well as those actors willing to set up new actions. Finally, centralisation in this way would increase the effectiveness of such projects by making them more accessible and opened to the large public.

…increase research into the suitability of training content and formats

Companies are not uniform. They are influenced by a range of factors, including the geographical area and sector in which they are located and the type of employees, with their changing expectations and skills requirements. Current training provision does not always respond to this variability. More research therefore needs to be undertaken to determine the suitability of training according to company (and employee) profiles.

There are a number of ways in which training schemes can be further researched. Firstly, there is a need to evaluate already existing vocational training programmes. Secondly, an exploration of other types of vocational training programmes would expand the available catalogue of best practice. Finally, research into new training models and content would give companies a greater range of possibilities according to their own particular circumstance.

> **…provide financial backing and support measures for the target group to be fully engaged in the design and preparation of vocational training**

The bottom-up approach of the DPs has been a notable success factor for their activities. As the beneficiaries have been involved in the design and delivery process, their expectations and needs have served as a basis for the organisation and priorities of the vocational training itself. However, it is not always possible to empower beneficiaries in this and other ways, owing to a lack of time and money. Therefore, policies need to 'make room' for the bottom-up process to happen. In practice, this means placing increased emphasis on the planning phase of vocational training provision, and encouraging consultation and participatory measures that shift 'power' away from the traditional providers and financiers to the ultimate target group.

6. VALIDATING SKILLS

6.1. PRACTICAL SOLUTIONS

> **Identifying existing competences and knowledge**

When employers become aware of what competences their employees and potential employees possess, or not, they can make adequate investment in their human capital and have a better return on their investment. This in turn leads to a financial saving on training because individuals only learn what they need for their job.

The *Empiria* DP (Greece) adapted a **competence toolkit** that was originally developed in Belgium under EQUAL Round 1. The toolkit was used to analyse competencies in the retail and motor trade sectors against nationally agreed benchmarks. The SMEs were able to utilise the toolkit to identify the competences of their workforce and initiate any appropriate training, which resulted in the SMEs becoming more competitive.

Similarly, the *Skills Analysis* DP (Great Britain) aimed to influence SMEs in the recruitment and retention of older workers by identifying their hidden competences via the use of a toolkit. This toolkit could be used also to assess the actual skills that SMEs really needed, as many of them did not have a training programme, human resource policy and were not even aware of their actual skills requirements.[10] In addition, the **toolkit had a unique, innovative feature insofar as it could be sector, organisation or age group specific.** Another innovation was the development of the **question bank** within the toolkit. This bank was tailored to the older workers within specific sectors and enabled comparison of the individual competences with those developed by the Sector Skills Councils. Linked to this, the inclusion of Sector Skills Councils awarding bodies, business organisations, SMEs and their employees in the DP partnership enabled the development of a cohesive approach to competence identification.

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[10] See 'Adaptability Peer Review ' Warsaw, October 2006 - Summary Report

Creating tools to empower individuals in validating their own skills

The focus on existing skills and their validation can empower individuals. The experience of DPs has clearly demonstrated that disadvantaged people are more than capable of getting advice, drawing up a personalised training and development plan, and topping up their qualifications. Indeed, after gaining qualifications through skills validation, many of the individuals involved in such 'empowerment-based schemes' expressed a wish to go on to gain higher qualifications.

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

Similarly, the *DIPA* DP (Cyprus) developed a system of '**training cards**' or **'initial audit of individual skills'** whereby counsellors audit each beneficiary's pre-existing skill levels. This allowed each beneficiary to only participate in those modules necessary, essentially creating an individually tailored training course. This approach positively motivated the beneficiaries to participate.

In terms of empowerment, DPs such as *Technomathia* (Greece) have demonstrated that skills assessments executed online - **validation from a distance** - can be very effective, as well as time and resource-efficient. *Technomatheia*'s use of ICT in the validation procedure brought about an important opportunity for a substantial part of the Greek population. People without access to centrally located accreditation centres were able to have their skills validated from a distance through the use of computers, Internet access, web cameras and videoconferencing. They could also make use of the accreditation centres around Greece, centres that offered all of the ICT services needed to pass an exam; in other words, the centres could link directly with an examination panel in Athens through videoconferencing.

Developing sectoral approaches to skills validation

Employers need validation that reflects specific skills in specific jobs. Thus, a sectoral approach to validation has been successfully tested by a number of DPs.

The experience of *The Route of the Professional Shipyard Worker* DP, implemented in the Masa-Yards Turku New Shipyard in Finland showed that the best available organisational resource was the good practice of experienced workers – especially in the area of health and safety. These experienced team members often came up with good working methods and practices for the company, but this type of knowledge was tacit (in the sense that it was not documented). Without a deliberate effort to document and share this knowledge, it would often be untapped. To address this problem, the knowledge was **documented into written or picture material** with the help of digital cameras and other technologies – and thus made more explicit for use by the workers and the company as a whole.

Another interesting example in skills validation is the *S.UP.PORT. - Skills Upgrading in the Ports* DP (Italy), which tackled the problem of outdated knowledge and skills of the port workers in commercial ports, shipping, nautical and ship-building sectors. The DP developed a substantial **skills certification system** in order to cater for changes in the ports to respond to a need for technological and organisational innovations. S.UP.PORT DP started by an overall analysis of the situation defining the needs of the workers, then it built new training pathways with the aim of validating and certifying the skills though the coordinated work of all the stakeholders (including the social partners). The training developed reflected the changes in the port operations and the problems related to the integration of the overall transport system and satellite industries. The aim of the system was to certify the workers' present skills and develop training pathways for the future, including both the knowledge and practical skills that would be required by the enterprise.

Developing a common framework for skills validation

The *DIPA* DP (Cyprus) focused in particular on the lack of a **unified system of validation**, because they believed that employers would benefit from a common framework for skills validation. They actively promoted the cooperation of the national systems of initial and sustainable education to achieve the standardization of the diverse approaches from the major public bodies involved and the adaptation of a common framework for skills validation.

> As Ms Michael explains, *"Cyprus is currently working towards establishing a national system for accreditation of vocational skills across all sectors. Creating a credible and effective framework for vocational training to replace the current fragmented system will help the labour market in adapting to economic challenges."*

Actions undertaken at the local level have to be coordinated with actions taken at the regional and national level in order to bring sustainable and effective results for companies and workers. One of the objectives of the *DIPA* DP is now to mainstream the outcomes of their work by contributing to the creation of a unified, national skills and vocational training strategy.

6.2. POLICY MESSAGES

Policies should…

…favour bottom-up approaches to skills validation

According to the experience of the DPs, the commitment of the beneficiaries is a key success factor which determines the effectiveness of the approach.

> As Lucia Barbieri from *Investing in People* explains, *"The partners showed the beneficiaries that an assessment of their competences was aimed at the validation of their skills, not their evaluation, that is, the exercise was not a tool directed <u>against</u> them."*

…**support the development of systems that combine the capture and management of knowledge with the promotion of learning**

The complementary approach, linking skills validation to formal education, proves that individuals who receive a portable validation can then go on to pursue further training within the formal education system. The use of 'training cards' for instance helps to identify skills gaps and encourages workers to take part in individually tailored training courses.

…raise employers' awareness on the benefits of skills validation

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Successful validation shows how the investment of effort and resources in the validation of non-formal and informal learning pays off for everyone concerned. The validation of skills is an

approach that is beneficial both for companies and workers alike: they can count on competences and skills that were previously hidden.

The Copenhagen Declaration (November 2002) established the aim of developing a set of common principles at European level for the validation of non-formal and informal learning to ensure greater compatibility between approaches in different countries and at different levels, thereby adding value to work at local, regional and national level. As the experience of *Investing in People* DP showed, the use of the VPL method was very reliable as it was based on EU systems and referred to lifelong learning values.

7. PROMOTING THE USE OF INFORMATION AND COMMUNICATION TECHNOLOGIES AND E-LEARNING

7.1. PRACTICAL SOLUTIONS

Making ICTs more accessible

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

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

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

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

> In the words of the Mayor of Bělá village, *"I have to say that ESF – EQUAL has brought excitement into our village, where during four evening and a whole Saturday, our inhabitants are on their feet, being busy and taking part in education."*

Using ICTs to promote social inclusion as a 'stepping stone' to improve employment opportunities

DPs have also used ICTs to **enhance social interaction, promote inclusion and support disadvantaged groups in the labour market**. Whilst this approach did not always immediately lead to employment outputs (in the traditional sense), DPs considered their activities as an

essential 'stepping stone' towards re-engaging marginalised groups so that they could then consider learning and employment opportunities. This was the case for the transnational partnership *Vit@l Society, Technology for People* project (Netherlands, Latvia and the UK) where partners provided a range of ICT services; for example, courses to up-skill unemployed and other marginalised groups (Latvia); using ICTs as a tool to support social integration and labour market return (UK); and strengthening local community building (Netherlands). The outcomes from the *Vit@l Society* transnational partners were a publication **'Vital Society: the new social use of ICT'** and a **Manifesto on the Social Use of ICT** which promoted the use of ICTs for all citizens. Both of these outcomes were instrumental in presenting the benefits that ICTs could bring, particularly in terms of communication amongst citizens, enhancement of local services and social inclusion in general.

A similar approach was used by the *Magusine* DP (Belgium). *Magusine* operated in the Poor Crescent, a zone of exclusion and marginalisation on the eastern border of Brussels. The aim of the project was to integrate marginalised populations by using ICTs as both a **communication and a pedagogical tool**. By way of illustration, the DP helped unemployed people and women to **organise web conferences and e-forums** and take part in the **making of a documentary film**. As a result, the individuals gained the opportunity to interact with each other, thereby enhancing their communication and presentation skills. Moreover, this interaction transcended different generations and nationalities, thanks to facilitated experiential and cultural exchanges. The final results of the DP were particularly impressive. Overall, the project trained 600 beneficiaries and developed a website www.magunews.net (presenting the beneficiaries' activities in the form of short films or written essays). It also published a report on the diversity of its work and was in the process of finishing the (above-mentioned) documentary film targeted at public authorities, partners, and the beneficiaries themselves.

Using ICTs to help employers to effectively invest in human capital

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The management of change is a critical challenge for companies - especially SMEs - and requires significant human capital planning and investment. However, companies often lack the knowledge and information to know how to do this effectively. As seen in many DPs, ICTs have allowed them to save time in their search for change management and consequently human resource solutions.

The *FENIX* project (Spain), for example, developed an IT tool to help social economy SMEs anticipate change, particularly that associated with age management. Representatives of public authorities were trained to use a **specially-designed tool** that helped them to **diagnose issues affecting businesses, and benchmark SMEs** against each other in terms of size, type, sector and geographical location. It thereby provided public authorities with precise information about the individual needs of each company, which they could to develop appropriate human resource responses.

The *Unemployment Prevention System in Underdeveloped Areas* DP (Poland) created another electronic tool called the **'e-barometer'**. Created and designed to help and support SMEs in two disadvantaged regions of Poland, the 'e-barometer' was conceived as an information portal. Through it, the project provided information on changes in macroeconomic and regional business trends so as to help entrepreneurs anticipate and adapt to restructuring. The forecast allowed SMEs to involve employers and employees in adaptation-oriented activities such as trainings on new technologies, as well as being able to become aware of the impact of change.

Using ICTs to inform and connect actors and beneficiaries

ICTs are virtual technologies that make an ideal information platform to inform and connect people in relation to lifelong learning, either at the beneficiary or practitioner level. This platform idea was at the core of the DP *Clare Life Long Learning*. The project, based in a rural area of the West coast of Ireland aimed to **bring together lifelong learning providers in order to reduce duplication, to increase quality and improve joint working**. This was made possible by a website which provided details of the courses, a list of the providers and an online forum for tutors. Also, a database gave information about each learner's individual progression and improvements. The benefits of this participatory approach were clear.

> As Mike Ryan from the Back to Education Initiative put it, *"It's not a competition that we're in. We're about cooperation and collaboration…as a provider, we benefit from the Network, and if we benefit, then so do our learners."*

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

Another example is that of *InnKoop* DP (Germany). As a means of helping SMEs that were suffering the effects of demographic change (particularly in terms of being unable to attract new, young skilled workers, the DP developed an **Internet-based communication and information platform** (http://www.innkoop-equal.de/index.html). This database allowed SMEs to gain guidance and advice on demographic change and be 'inspired' by examples of good practice. The Internet platform was also accessible to DPs and politicians, meaning that it acted as an extended network for human resource solutions between the public and private sector.

Finally, other sources of information using ICTs were launched by the different projects. For example, *C.R.E.S.C.E.R.E.* DP (Italy) which coordinated a virtual **SME Network Directory** which provided entrepreneurs with a free, self updateable web-brochure. The brochure helped the SMEs to network by putting them in touch with business partners to create transnational clusters. The site now contains 150 companies from the six countries and will be maintained until 2009, to ensure the sustainability of the work achieved to date.

Blending forms of learning

E-learning has been an evolving and increasingly recognised mode of delivery in education and training. However, the DPs have learnt that e-learning alone does not provide sufficiently good results. Therefore many of them have combined e-learning with traditional forms of interaction. *Lifelong Learning in Rural Conditions*, for example, initiated an '**e-learning on the cards**' programme, which entailed the e-learning of language courses (German and English) and computer technologies. This e-learning was especially efficient in reaching populations in remote areas, thanks to its flexible format adapted to personal timetables and needs. However, it was particularly enhanced by **face-to-face tutorials**, which allowed beneficiaries to be in direct contact with their tutors.

WIR (Germany) also combined e-learning and tele-coaching with classroom-based training and workshops. The Neckar-Alb region was facing technological change, alongside a lack of innovation amongst its SMEs and a relative slow rate of business start-up. In response to this problem, the project focused on teaching skills, in particular through the use of ICTs. For example, e-learning and tele-coaching allowed beneficiaries to develop their IT skills, as well as marketable skills. The project also combined this form of learning with classroom training: the beneficiaries could increase their social and emotional skills, including their personal projects in

the wider context of the company, with the direct support from trained tutors. This blended form of learning thereby allowed beneficiaries **to become accustomed to new forms of work, meeting the flexibility and adaptability requirements of modern companies**.

7.2. POLICY MESSAGES

Policies should…

…promote ICTs for the improved centralisation and dissemination of information

Virtual information platforms have allowed the exchange of experience between all participants of the programmes: workers and employers, DPs themselves and even policy-makers. These online sources have proved effective in the fields of lifelong learning, as well as in age management, and therefore should be encouraged within future policy making.

At some levels, catalogues of good practice already exist as an important source of information. These catalogues should be extended to the supranational level and made available on-line: being easy to access and available to all, an on-line catalogue of good practice would help to promote interaction between actors, and create a reliable and updated source of information.

…develop adapted structures for increased access to ICTs by marginalised populations

The use of new information technologies has become necessary in an increasingly developed world. Inexistent ICT skills not only prevent workers from getting (re)-employed, but also from searching for opportunities that are ever more available on the Internet. Unemployed people and particularly marginalised population such as migrants, women or older workers, have found many hurdles to adapting to technological change. Most of the time, they do not have access to ICT structures or training, which are even more scare in remote areas.

Programmes should be adapted in order to reach marginalised populations who are unaware of and/or unable to access these ICT-based opportunities. Mobile computer rooms, as well as simple and user-friendly software can help these populations to overcome their fears and learn based on an enjoyable experience.

…promote and support blended forms of learning

Forms of learning involving ICTs, such as e-learning or tele-coaching have become important and sometimes inevitable due to their flexibility in terms of time, finance and resources. It has however been shown that social interaction is a key success factor for individuals to learn and adapt to change. The achievements of DPs in using blended forms of learning should serve as a positive example for others to follow.

8. NETWORKING

8.1. PRACTICAL SOLUTIONS

Making sure that the network involves a wide range of stakeholders

EQUAL DPs have clearly shown the benefits of networking at local, regional and national levels as an effective way of developing lifelong learning and age management approaches. One of the main features of these networks is that they involve a **wide range of stakeholders**: members coming from extremely different backgrounds, all bringing together their personal competence and know-how to come up with common solutions; in essence, the more broad and varied the network is, the more it addresses the complex and multi-faceted nature of the problems being addressed. The EQUAL networks have generally been composed of DPs, as well as an extensive range of 'non-DP organisations', including associations working with different target

groups, social partners, national governmental bodies, and regional or local authorities. [11] These non-DP organisations have acted as 'experts', bringing their knowledge and experience to the activities of the network and ensuring a direct link with relevant institutions and policy makers.

It can be helpful to involve partners that bring added value and experience to the **development of the network's thematic focus**. This in turn ensures that the project experiences are shared and discussed within a wider policy context, thereby enhancing the potential for mainstreaming outside of the network. For example, the *Greek National Thematic Network (NTN) on Lifelong Learnng* had two main target members: organisations involved in vocational training and those involved in the enterprise sector. The network also planned to involve key European associations such as CEDEFOP (The European Centre for the Development of Vocational Training) and EVTA (European Vocational Training Association), as well as the Ministries of Employment, Education and Development (to ensure a direct contact with the entrepreneurial world).

Other networks have assumed more of a **coordination function** between different institutional bodies, which has helped to improve communication and collaboration on labour market issues. This was the case for the Spanish *NTN on Adaptability* which included eight regional governments (out of the nineteen that exist in Spain) and the central government (Ministry of Labour). This national networking provided a way for the central government to gather the regions into a common platform, and foster the transfer of experience and good practice. It also strengthened the coherence between regional policies (each Spanish region works on its programmes independently). Similarly, the Swedish National Thematic Group *NTG-Learn* involved all of the local and regional state organisations involved in adult learning and age management in Sweden. As the responsibility for the adult learning was spread across several government departments, there was a clear need for communication and coordination between these government departments – via the network.

> As a Stefan Ekenberg, the network co-ordinator, reported, *"Networking is an excellent way of involving all stakeholders, in particular those who are able to transfer good practices at the political level."*

Other networks include a majority of actors representing the social partners with the view to **promoting social dialogue** within the lifelong learning and age management fields. This was the case with the Italian network *Learning to Innovate* which comprised members of the Confindustria (Italy's main employers' confederation), CISL (union confederation) and the Regional Chambers of Commerce. The involvement of these actors was essential for two main reasons. First of all, the social partners played an important role in making the companies aware and engaging them in blended learning and e-learning programmes and, generally, in promoting the learning culture amongst the smallest economic operators. Secondly, they ensured a connection between the training strategies and socio-economic development policies at local level.

Using the network to collect and disseminate good practice

Collecting the good practice developed by the DPs and giving visibility to the best and innovative results is another feature of the networks. Networks can be considered as 'spring boards' for these results to be known by other, key actors at different levels. The meetings organised by the networks are usually events where the DPs can present their products and results, which are afterwards gathered together in handbooks or other dissemination documents.

The *Greek NTN on Lifelong Learning* organised three thematic workshops to collect information on how EQUAL DPs work to develop and implement lifelong learning programmes. The information collected was to be pulled together in a handbook, which would serve as a **good practice manual**. A **dissemination conference** was also on the cards for the network in May 2008 - to present the manual to national policy makers and the public. The Spanish *NTN on Adaptability* also planned to publish a good practice guide developed under EQUAL. The guide

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[11] Each DP is a partnership of more than one organisation, so the network brings these partnerships together, either on their own or with other organisations.

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would include five or six examples of good practice related to age management and lifelong learning. The publication would also focus on 'clusters of activities' based on the following themes: corporate social responsibility, ICTs, adaptability of enterprises to new technologies, new professional profiles, new forms of work organisation, flexicurity, cooperation between institutions and stakeholders, age management and equal opportunities.

Apart from handbooks, alternative approaches to collecting good practice examples have been adopted by some networks. For example, the Italian *Learning to Innovate* produced a **film illustrating the activities of the EQUAL projects** composing the network. The film illustrated the innovative products developed by the DPs, backed up by evidence from the project beneficiaries and institutional representatives involved in the network. The film was to be shown during the national convention organised by the Ministry of Labour at the beginning of 2008.

Using the network to develop strategies at the national and regional level

Another notable area of success for the networks can be seen in the development of national thematic strategies. The aim of these strategies is to present to national and regional policy makers, recommendations and suggestions on how to change policies to make them more effective and targeted – directly based on the good practice, insights and innovation of the EQUAL DPs. The critical mass of the DPs in the networks has helped to give rich content and 'weight' to the development of the strategy.

Strategies might have a **thematic focus**, as is the case in the Czech Republic. The Czech *NTN Adaptability and Lifelong learning* involved eight organisations such as the Ministry of Labour and Social Affairs, Ministry of Education, as well as research and vocational training institutes. Together, they produced a **'national lifelong learning mainstreaming strategy'** which identified and described the most innovative products and tools of the lifelong learning DPs working within the network. The strategy also included recommendations to policy makers (to be formally presented at the end of 2007) on how best to integrate these innovative practices within national policies.

> As Zdenek Karásek, a member of the network put it, *"The network has developed social capital through the organisation of common activities. Now we know each other better. The sharing of information and knowledge between the DPs and the thematic experts has been beneficial to everyone."*

In other countries, the developed strategies have had more of a **target-group focus**. The *Greek NTN*, for example, wished to address the needs of target groups who have difficulties in undertaking lifelong learning such as isolated agricultural workers or working parents who do not have time to participate in training. The strategy developed by the network focused on the instruments developed to reach these groups and addressed their specific training needs.

> As Ioulia Egglezou, Director of the Training Centre and co-ordinator of the network, said, *"National strategies should avoid proposing vague programmes, but try to give simple and concrete solutions to people. In order to be successful, national strategies should always be adapted to the needs of specific target groups."*

Linking with national and regional policy makers to enhance mainstreaming

The networks have developed a number of successful approaches to promoting and sustaining the mainstreaming of EQUAL products within the context of national and regional policy development. The mainstreaming has even reached as far as the OPs for the new ESF. Indeed, these network examples show clearly how bringing a collection of funded projects together with strategic policy makers can positively influence and inform policy development – especially within the context of the new ESF.

For example, the *Flemish NTN on Age Management* established direct contacts with representatives of the federal and Flemish administration. These contacts with policy-makers were vital for ensuring the **direct transfer of the EQUAL results to the Flemish government**. DPs have also benefited from direct contacts with the authorities: through such links, the members have been able to plug into policy developments and be informed of government

measures and funding opportunities to support companies in their age management (e.g. Generation Pact and Ervaringsfonds[12]). Another interesting example is the Italian *Learning to Innovate* , which developed the role of 'Institutional Tutors'. These tutors were representatives of national and regional institutions and key organisations such as the ISFOL (the national institute for Training of Workers) who participated regularly in the meetings and activities of the network. Their primary task was to transfer the ideas and results of the DPs directly to the authorities at national level (especially the tools implementing innovative learning methods for companies).

Regional authorities have also benefited from the mainstreaming of EQUAL results, thanks to the networking activity. In Spain, for instance, the eight regional authorities taking part in the *NTN on Adaptability* used the good practice and EQUAL results in elaborating their own regional employment policies. Moreover, some of the **EQUAL Adaptability principles and practices were directly incorporated into the regional ESF OPs**. In other words, the network provided a vehicle for ensuring the longer term impact of EQUAL within regional ESF implementation.

Another aim of the mainstreaming activities developed by the networks has been **raising the awareness of policy makers about less 'familiar' issues**. In Sweden, for example, some national and regional policy makers, after having participated in the *NTG-Learn* activities, turned their attention to the interrelation between adult learning, age management and sustainable development and are now working to further promote these issues.

> As Stefan Ekenberg, the network co-ordinator, stated, *"The network has helped to promote the awareness of these policy areas as connected and complex, rather than separated and simple issues. The network has gathered actors that would otherwise have not sat round a table, and in this way has had a considerable influence on the participating organisations."*

Networks are also involved in spreading good practice and effective results to sectors and target groups other than those addressed by the DPs involved in the activities of networks. This is illustrated by the Greek *NTN*, which intended to spread the benefits of the activities developed under EQUAL to the greatest number of sectors and target groups.

Policies should…

……promote and support the establishment of networks linking funded projects with a range of key stakeholders

Networking has proved to be an extremely successful method of knowledge-sharing between different key actors. Moreover, networking enables the establishment of enduring links between members, as well as the transfer of results to institutions and key policy makers at different levels. Policies should therefore promote the establishment of networks linking funded projects with a range of key actors such as organisations supporting vulnerable workers, social partners as well as local, regional and national policy makers.

…invest in networking at the European level

The involvement of local and regional institutions in networks has proved to be very effective in order to transfer and incorporate the EQUAL results into regional and local policies and employment strategies. In some cases, the networks have provided an effective vehicle for ensuring the longer term impact of EQUAL within regional ESF implementation. However, many networks have emphasised that there should be a stronger focus on disseminating the good practices of the funded projects (EQUAL or otherwise) at the European level. The innovative tools and practices developed by the funded projects should be more strongly incorporated into

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[12] Het Ervaringsfonds is a federal funding instrument to support companies with projects focusing on older workers. The Generation pact was adopted by the federal government in October 2005. For further information, see http://www.premier.be/nl/politics/generationpact.html

European policies and strategies for lifelong learning and age management. Networks are absolutely essential in achieving this stronger European dimension.

An interesting development in this area is the development of a European Network on Age Management. The network idea was launched by the *Competence 50+ DP*[13] at their highly successful conference 'Competence 50+ 2007: age as an opportunity' in Gothenburg, Sweden on 18-20 June 2007. Since that time, a range of planning and promotional meetings have been held to define the scope of the network, secure funding and generate a European-wide membership. For further information, please refer to the *Competence 50+* DP in Annex 1.

> **…promote networking as a means to develop synergies between different funds and initiatives**

Authorities should look at the complementarities that exist between the experiences and results that have been developed under different programmes – European networks are an ideal way of achieving this. Creating links between different initiatives at the European level is important for two reasons. Firstly, it can avoid the duplication of efforts between different actors implementing parallel actions. Secondly, a joint approach to a problem can lead to better and more effective results.

> Gabriella Bettiol working in the *Learning to Innovate* network (Italy) stated, *"Different initiatives have been created and implemented to introduce new learning methods within SMEs. The EQUAL funded projects have developed interesting tools, but much has been done also by the programmes of DG Enterprise and Industry, which are principally targeted at SMEs. Policies should develop synergies between different funds and initiatives: better solutions can be produced by creating links and combining different approaches and working methods."*

9. CONCLUSIONS: EQUAL'S LEGACY

In summarising this paper, it is possible to highlight four main ideas.

Target-group tailoring

> Many of the DPs have stressed the importance of considering in detail the needs of the target group and adapting the lifelong learning or age management intervention accordingly. In others word, there is no 'one size fits all' based on false or quick assumptions about the target group. Instead, every tool, method or information package must be developed based on the true and often subtle, psychological issues faced by the target group. These issues can be explored by using bottom-up and investigative approaches such as research, initial needs assessment, surveys, consultation exercises or one-to-one sessions, not only at the beginning but throughout the project intervention.
>
> Target-group tailoring not only concerns employed or unemployed individuals struggling in the labour market. It also relates to employers. Indeed, businesses form a critical part of the 'employment equation' and need to be actively engaged and supported in developing their workforce. Tailoring therefore involves getting to know and understand the senior management, using business-friendly terminology and concepts, and adapting support specially for companies of a particular size or sector.

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[13] The EQUAL Unit commissioned a background document in support of the network idea, entitled 'A European Age Management Network: the way forward?'

Getting the 'right mix'

The DPs have had a strong tendency to mix types of method or individual as part of their overall approach. Examples have included the blending of ICT-based learning with more traditional, face-to-face interventions. There has also been the combination of practical with more theoretical subject matters within the context of intergenerational – which is in itself another mix, bringing together older and younger workers to mutually transfer knowledge and skills.

There has been an evident mix in the networking experience of the DPs. In fact, the latter have drawn significant benefits from involving a range of individuals and organisations in their collaborative work, such as being able to draw on the policy influence of regional or national authorities, company links of the social partners and target group insights of the NGOs.

One probable reason for the success of this focus on mixing is that it reflects the multi-faceted nature of the labour market problems in hand. Indeed, identifying what or who works best to address different aspects of the problem and then combining these together means that the solution is far more holistic and integrated. Moreover, at the more personal level, a mix always provides an element of variety which can keep individuals motivated and engaged.

Being informed

Easy access to information, particularly at various territorial levels, is a recurring theme amongst the DPs. Many DPs have observed a lack of useful information that can help to take forward a lifelong learning or age management measure. This has particularly been the case in the field of vocational training, to the extent that the DPs have called for a European institution for the centralisation of information in this area.

To address the information gap, the DPs have developed systems to increase the target groups' access to information, on for example, training opportunities or business intelligence. They have also extended their activities as far as awareness-raising - in other words, using strategically chosen and well presented information to raise awareness amongst key audiences, such to policy makers and companies.

ICTs have played an important role in facilitating access to information in the form of websites, DVDs, films and virtual networks. As expected, they have proved particularly helpful in more remote, rural areas or where the priority is to communicate at a wider territorial level. That said, the DPs have emphasised that ICTs should not be to the detriment of face-to-face interventions and physical infrastructures – blended approaches are of the order.

Partnerships and networks

Partnership and networking principles have proved essential in the achievements of the DPs. The effectiveness and sustainability of the solutions would not have been possible without their collaborative efforts. These efforts have taken the form of strategic and operational alliances between a range of stakeholders, including employers, regional/local authorities, social partners, to name but a few. They have also have involved communicating and making links with organisations and individuals who have hitherto been 'excluded' from projects of this type; for instance, various community organisations or indeed the beneficiaries themselves.

A success factor in the above work has been clearly identifying and assigning roles to each of the partners, as well as having agreed objectives and foci, whether it be collating good practice, designing a new ICT system or developing a national strategy. This is clearly illustrated by the *Spanish Thematic Network on Adaptability*, which by bringing together the DPs and regional governments, managed to inform the development of the regional ESF OPs for 2007-2013.

All levels of intervention have been highlighted. At the European level, there is the suggestion of developing a network to link the structural funds, as well as the current development of the European Network on Age Management. Country-wide networks are seen as particularly

beneficial in terms of mainstreaming to national policy makers. And there is also the idea of strengthening networks for regional-level social dialogue.

A 'bridge' for the ESF…

These ideas – and the solutions and messages that underpin them - are seen as particularly useful for individuals and organisations engaged in the new ESF. For instance, they can serve as examples of good practice for inspiration to others, or help to identify key organisations for involvement in new ESF projects. And they may help to define the parameters for selecting, assessing and supporting new ESF projects. Overall, it is hoped that the publication will provide a 'bridge' between EQUAL and new ESF actors (as well as other employment actors) so that EQUAL is able to leave a positive and informative legacy for future funding rounds.

ANNEX 1: EQUAL SOURCE INFORMATION

A full list of the EQUAL DPs cited in this publication is presented below. This list includes the DPs that were interviewed specifically for this publication, as well as others that have been previously visited or featured as case studies.

It must be emphasised that these projects have not been the only source of information. As outlined in Annex 2, this paper has drawn on a much wider source of project and programme information, as well as consultation with relevant European and national stakeholders for both EQUAL.

Information on all aspects of EQUAL can be found on the programme websites. EQUAL: http://ec.europa.eu/employment_social/equal/index_en.cfm.

Name of the DP and NTN	Member State	Contact person	E-mail of the contact	Telephone of the contact	Reference/Link to the case study
ADAPNA	Spain	Silvia Marraco	internacionales@navarra.ugt.org	+34 94 838 20 28	
Alliance for Work	Poland	Kamila Jeżowska	kamila.jezowska@undp.org.pl	+48 225768191	http:/ec.europa.eu/employment_social/equal/practical-examples/adapt-06-pl-alliance_en.cfm
Carlow	Ireland	Orlaith Mc Hugh	orlaith@carlowequal.ie	+ 353 59 9720733	www.carlowequal.ie
Clare Life Long Learning Network	Ireland	Ann Knox	ict@clarelearningnetwork.org	+ 353656843490	http:/ec.europa.eu/employment_social/equal/practical-examples/adapt-06-ie-clare_en.cfm
C.R.E.S.C.E.R.E.	Italy	Laura Menchi	Laura.menchi@forpin.it	+ 39 0523 335825	
DIPA	Cyprus	Margarita Michael	mmichael@oeb.org.cy	+ 35722665102	
Empeiria	Greece	Apostolos Xyraphis	fin@oke.esc.eu	+ 30 210 9249510	http://ec.europa.eu/employment_social/equal/practical-examples/adapt-07-el-empiria_en.cfm
E.N.T.E.R.P.R.I.S.E. for Europe	Finland, Germany, Italy, Poland, Portugal and Spain	Bertram Lohmüller	bertram.lohmueller@gimaconsult.com	+49 70719425530	
EUNETYARD	Greece	Irene Christoforou	neorkek@otenet.gr	+302281082555	

Name of the DP and NTN	Member State	Contact person	E-mail of the contact	Telephone of the contact	Reference/Link to the case study
GESSCANT	Spain	Sonia Cobo	equal@orecla.com	+34 942364145	http:/ec.europa.eu/employment_social/equal/practical-examples/adapt-06-es-gesscant_en.cfm
Facilitation of Lifelong Education in Rural Conditions	Czech Republic	Kateřina Baladová, Tomáš Hájek	hajek@krakonos.com baladova@krakonos.com	+ 420481311698	http:/ec.europa.eu/employment_social/equal/practical-examples/adapt-06-cz-facilit_en.cfm
FAIRplus in the Nuremberg Region	Germany	Uwe Elsholz	Elsholz.uwe@f-bb.de	+ 49 911 2777 997	
FENIX	Spain	Eva Lopez Martin	elopez@a-emprende.net	+ 34 954 78 72 72	
Flemish National Thematic Network on Age Management	Belgium Nl	Stefaan Ryckewaert	stefaan.ryckewaert@esf-agentschap.be	+32 2 546 22 20	http://ec.europa.eu/employment_social/equal/practical-examples/adapt-07-benl-ntn_en.cfm
German National Thematic Network on Lifelong Learning	Germany	Uwe Jäger	jaeger@eichenbaum.de	+49 3621 510 400	
Ageing at Work – from talk to action	France	Aslaug Johansen	a.joahnsen@arete.fe	+33 1 40 22 12 16	
Greek National Thematic Network o Lifelong Learning	Greece	Ioulia Egglezou	englezou@apopsi.gr	+ 2104618585	
HIGH ROAD	UK-GB	Joe Fearnehough	JFearnehough@TUC.ORG.UK	+ 0151 236 7678	
In Motion	Austria	Otto Rath	otto.rath@isop.at		http://ec.europa.eu/employme

Name of the DP and NTN	Member State	Contact person	E-mail of the contact	Telephone of the contact	Reference/Link to the case study
					nt_social/equal/practical-examples/adapt-06-at-motion_en.cfm
InnKoop	Germany	Rene Trommer	trommer@kitd.de	+49 371 3695817	
Investing in People	Italy	Lucia Barbieri	lucia.barbieri@provincia.mc.it	+ 39 0733 409 112	
Learning to Innovate	Italy	Gabriella Bettiol	area.progetti@siav.net	+ 39 041 2517511	
Lifelong Learning and Adaptability in the Czech Republic	Czech Republic	Zdenek Karasek	karasek@rpic-vip.cz	+420 596 616 795	
Life Competence 50+	Sweden	Folke Brolin	info@livskompetens.com	+46 (0)702 292 890	http://www.livskompetens.com/competence50+/ http://ec.europa.eu/employment_social/equal/practical-examples/adapt-07-se-lifeco_en.cfm
Magusine	Belgium Fr	Pierre Rivir	Pierre.rivir@lescorsaires.be	+ 32 2 522 7428	
My Portfolio Online	Netherlands	Els Rose Kuiper	info@brekendvaatwerk.nl	+31 20 6247743	http://ec.europa.eu/employment_social/equal/practical-examples/adapt-07-nl-myport_en.cfm
National Thematic Group Adaptability	Spain	Victoria Berrocal Ruiz	vberrocal@mtas.es	+ 34 91 363 20 53	
Navigator	Greece	Irene Christoforou	neorkek@otenet.gr	+302281082555	

Name of the DP and NTN	Member State	Contact person	E-mail of the contact	Telephone of the contact	Reference/Link to the case study
New Chance for Transnational Job Market and Economy in the Euroregion Nysa	Poland	Ewa Komenda	fcwp@poczta.onet.pl	+ 48 75 77 50 672	
NTG-Learn	Sweden	Stefan Ekenberg	stefan.ekenberg@ltu.se	+ 46 920 493041	
RITA	Portugal	David Gago	davidgago@qualigenese.pt	+ 351 289 803 773	
S.UP.PORT. - Skills Upgrading in the Ports	Italy	Giovanni De Blasi	formazione@portauthority.li.it	+39 586 249609	
Silver Heads Club	Slovakia	Lucia Volekova	luciavolekova@gmail.com	+ 421 2 6381 0322	
Skills Analysis	UK	Milton Rebecca	rmilton@ndevon.ac.uk	+ 1271 338227	
Technomathia	Greece		equal@kekgsevee.gr	+30 210 8544666	
TEP Equal Elderly	Austria	Wolfgang Michalek	michalek@zsi.at	+43 (1) 49 50 442-47	
The Route of the Professional Shipyard Worker	Finland	Ismo Haapala	ismo.haapala@tuakk.fi	+358 2 4119 00	
Your Home - Your Enterprise in E-urope	Slovakia	Jozef Takács	zrrhn@zrrhn.sk	+ 421 46 542 56 96	http://ec.europa.eu/employment_social/equal/practical-examples/adapt-07-sk-zdru_en.cfm
Vit@l society	Netherlands	Els Rose Kuiper	info@brekendvaatw	+31 20 62 47 743	

Name of the DP and NTN	Member State	Contact person	E-mail of the contact	Telephone of the contact	Reference/Link to the case study
	, Latvia and United Kingdom		erk.nl		
WIR	Germany	Bertram Lohmüller	bertram.lohmueller@gimaconsult.com	+49 (0) 70719425530	
WISER	France, Germany and the UK	Odette Repellin	repellino@national.ffbatiment.fr	+33 1 40695100	

ANNEX 2: METHODOLOGY

This annex outlines the methodology used by GHK Consulting Ltd in preparing this paper (including the case studies). The main stages of the research and methods used to gather and analyse the information for this EQUAL publication were as follows:

INITIAL DESK RESEARCH

Elaboration of the six main themes

During the summer of 2007, the Greek Ministry for Employment and Social Protection (Greek EQUAL Managing Authority) decided to organise a European EQUAL conference entitled 'Anticipating Change: effective approaches to lifelong learning and age management'[14], with the support of the European Commission's EQUAL Unit, a Steering Committee of eight Member States and GHK Consulting Ltd.[15] A decision was subsequently taken to structure this publication around six broad themes mirroring the agenda of the afore-mentioned conference:

1. Engaging employers - especially SMEs

2. Developing intergenerational learning

3. Developing vocational training

4. Validating skills

5. Promoting social dialogue

6. Promoting the use of ICTs and e-learning

These six themes are seen as addressing - in a 'transversal' way - the broader themes of the 'Anticipating change' conference, namely:

o Lifelong learning

o Age management

CONSULTATION PROCESS

The publication took shape though a series of consultation activities:

o The DPs serving as examples to illustrate the EQUAL practice in this publication were identified through a 'thematic survey' undertaken by GHK among the EQUAL Managing Authorities (MAs) and/or National Support Structures, representatives of the European Thematic Groups and the relevant NTNs. The survey comprised a questionnaire asking recipients to identify and provide information on suitable projects showing good practice in lifelong learning and age management.

o Consultation and cooperation with representatives from the European Commission's EQUAL Unit were regular, both for the selection and validation of the EQUAL projects showing good practice.

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[14] The conference was held on 6 and 7 December 2007 in Athens, Greece.

[15] The countries represented on the Steering Committee are: Cyprus, Greece, Germany, France, Poland, Slovakia, Spain and Great Britain.

- The Steering committee (consisting of nine EU Member States, Commission and GHK representatives) discussed and confirmed the aims and objectives of the 'Anticipating Change' conference, its target audience, conference themes, the focus of the workshops, and conference programme. This information helped GHK in structuring and 'targeting' this paper.

Representatives of GHK also attended a number of events related to the themes discussed in the 'Anticipating Change' conference, which provided additional sources of information in developing this publication:

- The 'Active ageing: Regional responses to the demographic challenge' workshop at the 5th OPEN DAYS-European Week of Regions and Cities

- The European conference 'Competence 50+ 2007: age as an opportunity' organised in Gothenburg, Sweden, on 18 – 20 June 2007 by the Swedish *Life Competence 50+* DP

- The Adaptability Peer Review event organised by the Polish EQUAL Managing Authority on 3 and 4 October 2006.

- The European event Agora 'Experience is capital' on age and diversity management, jointly organised by the European Commission and the French Ministry for Employment, Social Cohesion and Housing, held in Paris on 23 and 24 June 2005

TELEPHONE INTERVIEWS

The output of the initial research and 'thematic survey' was a compilation of key information on over 110 EQUAL project presenting good practice in the fields of lifelong learning and age management. After consultations with the Commission, 20 EQUAL projects from for this cohort were selected for a telephone interview. The purpose of the telephone interviews was to explore in greater depth the experiences and good practice of the projects in relation to lifelong learning, age management and the six transversal themes. They also helped to identify and start formulating 'policy messages' included in this paper.

The 20 selected EQUAL projects were also invited to present their good practice in the thematic workshops of the 'Anticipating Change' conference.

Based on the telephone interviews, six EQUAL projects were selected for a further round of data collection necessary for the development of case studies.

REFINEMENT OF THE PAPER AND FURTHER CONSULTATION

This paper was then elaborated, refined and ultimately finalised based on the comments received though consultations with:

- Representatives of the 20 interviewed projects

- Representatives of the Steering Committee of the 'Anticipating Change' Conference

- Greek EQUAL Managing Authority, as organiser of the conference

- Representatives of the Commission's EQUAL Unit.