Summaries of the evaluation reports on the strategic priorities and on the five horizontal themes defined in the ESF policy frame of reference:

Information society, equal opportunities, sustainable development, local partnership and anticipation
SUMMARIES OF THE EVALUATION REPORTS ON STRATEGIC PRIORITIES AND ON THE FIVE HORIZONTAL THEMES DEFINED IN THE ESF POLICY FRAME OF REFERENCE:

INFORMATION SOCIETY,
EQUAL OPPORTUNITIES,
SUSTAINABLE DEVELOPMENT,
LOCAL PARTNERSHIP AND ANTICIPATION

January 2004
FOREWORD

Mid-term evaluations have been carried out of the actions co-financed by the European Social Fund in the middle of the programming period 2000-2006. This report publishes summaries in English of the following six evaluation reports: the reports on the implementation of the strategic priorities outlined in the ESF policy frame of reference in the Equal Community Initiative and in the Objective programmes 1, 2, and 3; as well as the evaluation reports on the five horizontal themes defined in the ESF policy frame of reference - that is, information society, equal opportunities, sustainable development, local partnership and anticipation. The ESF policy frame of reference is a document which describes the basic principles of the actions promoting employment and human resources in the structural fund programmes in Finland. The observations made in these evaluation reports have facilitated the implementation of the mid-term review of the ESF activities that will be carried out by 31 March 2004 in all the programmes in accordance with the Commission’s regulation. The evaluators have provided valuable information on the programme results and on issues that need further development.

Ms Susanna Piepponen, Senior Planning Officer, has acted as Chairperson of the ESF evaluation steering group and the members include: Mr Samu Tuominen, administrator, European Commission; Ms Åsa Sundholm, administrator, European Commission; Ms Sirpa Liljeström, Senior Officer, Ministry of Labour; Ms Merja Niemi, Senior Officer, Ministry of Education, Ms Anna-Liisa Lekonen, Ministerial Adviser, Ministry of Trade and Industry; Ms Marja Taskinen, Ministerial Adviser, Ministry of the Interior; Mr Juho Saari, Ministerial Adviser, Ministry of Social Affairs and Health; Ms Eeva-Liisa Koivuneva, Administrator, Legal Affairs, Ministry of Labour; Mr Ralf Grahn, Administrator, Legal Affairs, Ministry of Education; Ms Aila Ryynänen, Senior Officer, Ministry of Labour; Mr Matti Sihvo, Labour Market Counsellor, Ministry of Labour and Ms Pauliina Porkka, Senior Officer, Ministry of Labour. Mr Toni Vasama, Project Coordinator, has acted as Secretary of the steering group.

Helsinki, January 2004

Pertti Toivonen
Director
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EVALUATION OF THE STRATEGIC FOCAL POINTS OF THE ESF IN FINLAND

Final report

Kari Hietala

October 2003
1. INTRODUCTION

European Social Fund (ESF) action in Finland has the following vision: European Finland for expertise, employment, know-how, entrepreneurship and equal opportunities. Vision is accomplished by four strategic focal points:

- exploitation of the demand for labour and promotion of employability
- promotion of equality and equal opportunities between sexes and in working life
- improving the quality and effectiveness of education and training, promoting occupational mobility and strengthening the relationship between education/training and working life
- development of human capital to support entrepreneurship and quality of working life and utilisation of research and technology

These focal points correspond to the four priorities the Finnish Objective 3.

Structural fund programmes included the analysis are Objective 1 Programme in North Finland, Objective 1 Programme in East Finland, Objective 2 Programme in West Finland, Objective 2 Programme in South Finland, Objective 3 Programme and the Transnational Communitive Initiative EQUAL.

The aim of the evaluation is to clarify the relevance and the benefits of these four strategic focal points. Evaluation approach used here is mainly policy evaluation. This assessment includes conclusions from evaluations made at the other programme level evaluations. Assessment is based on the materials produced by other evaluators, and on the other hand, on the materials gathered especially for this evaluation.

This final report includes 1) introduction, 2) the analysis of the frames of reference in the four strategic focal points and the analysis of the relevance of the focal points, 3) analysis of the Internet survey conducted among the project leaders of the above-mentioned programmes, 4) analysis of the monitoring data base ESRA, 5) analysis of the interview material and of the evaluation reports of the programmes, 6) comparison of ESF and national employment policy/European employment strategy/National Action Plans, 7) Conclusions, 8) Recommendations.

By using EU’s Effectiveness concepts, the main focus of this review is the long term effectiveness, outcome. With the help of long term effectiveness, outcome the general objectives will be hopefully reached. This means that for example there will be a distinction in a project between short term consequences (which is emphasized in
the evaluations of the programs) and between the long term consequences after the project. Nevertheless there is very little measured empirical ex post information of long term outcomes. Nevertheless these are analysed in this evaluation work.
2. FRAMES OF REFERENCE AND RELEVANCE OF THE STRATEGIC FOCAL POINTS

2.1 Exploitation of the demand for labour and promotion of employability

Relevance of the focal point 1 is very good from the point of view of active labour market theory. According to this theory labour markets are divided to the numerous sub-markets. In some markets there is over-demand for labour (open vacancies) and in some other markets there is oversupply of labour (unemployment). The aim of the labour market policy is to adjust these together. If the aim is successfully reached, labour markets are flexible; if not, labour markets are rigid. In Finland labour markets are becoming more and more rigid in the long run, because we are moving outwards in open vacancies – unemployment system of coordinates. Measures of the projects suit very well to the situation, where the goal is to stop the increase of the rigidity and increase employability.

On the other hand in cyclically sensitive Finland, emergence of structural unemployment can be described very well by hysteresis phenomenon. Part of that remains stable. Both demand for and supply of labour adapt to the situation. The Structural Fund projects do not offer many solutions for the reasons behind the emergence of the structural unemployment. What makes the situation even worse is that the distribution of income in Finland is among the most even in the world. Low productivity workplaces are disappearing, because distribution of human abilities and, in connection to that, productivity, is the same as elsewhere in the world. EU projects provide good solutions to the visible problems but they do not offer solutions to the hidden, long run problems of labour markets. One of the reasons naturally is that those problems require structural solutions.

Recently, there has been an attempt to solve at least a part of those structural problems and to increase employment (Sailas report). From this follows some interesting possibilities to the Structural Fund projects. Ordinary training etc. measures can be linked to the structural measures. It seems, however, that only part of the suggestions is going to be accepted.

Strategic employment focal points possible futures were analysed with the help of growth scenarios. It turned out that the future of the employment is strongly dependent on the speed of growth. In the circumstance of fast growth speed, the employment will develop as expected if the structural circumstances will support not prevent (as nowadays) the achievement of goals. As a result there will be a shortage of labour and as a partial solution immigration will grow rapid-
ly. If in the other hand the speed of growth is much lower the employment goal will not be achieved and the immigration will not increase as imagined. As a result ESF will have a different role in these totally different situations.

2.2 Promotion of equality and equal opportunities in working life

In Finland equality between men and women and equal opportunities in working life, that is social inclusion, are included in the same strategic focal point/priority.

Measures promoting equality between sexes are relevant in the present situation. In a longer run perhaps more could be stressed woman entrepreneurship (creates good examples), linking of work and family life (important from the points of view of equality and employment) and assisting the most disadvantaged men (educational level of men is becoming worse than that of women; men will be more displaced).

Social inclusion measures are targeted to young persons with low educational level (danger to become drop-outs and/or displaced) and to older persons (danger to become displaced). Here also measures are relevant in present situation. In a longer run, however, different services to the most disadvantaged groups seem to concentrate the same places, Employment service centres. “One stop shop” principle will be adopted here as it has been adopted earlier in the promotion of entrepreneurship. This change will also change environment of structural Fund projects. The best practices developed in the EU-projects – as far as there are such – will then be adopted by new service centres (one stop shops). One indicator of success will then be, how many of the best practices have been accepted to the pool of services of one stop shop for the disadvantaged. This also creates a partial solution to the problem, how and by which money to continue projects or content of projects, which have produced good practices. This creates also a need to integrate projects to the national employment policy and to the European Employment Strategy behind it. – It should be considered, therefore, what consequences these chances in environment will have to the programmes and projects.

With the strategic focal point equality, the future scenarios will result in the increase in social differences and a step towards Anglo-Saxon welfare model. Another scenario (that is naturally preferred) is that the Nordic welfare model will continue to stay as before. There are slight differences between these scenarios in relation to employment and unemployment. The biggest threat from the perspective of the Nordic welfare model is that Estonia (which represents purely the Anglo-Saxon welfare model) is so close by. This would most likely result in tax competition. A strong signal of this possible tax competition has been already seen in the talks of decreasing the tax on alcohol.
2.3 Improving the quality and effectiveness of education and training, promoting occupational mobility and strengthening the relationship between education/training and working life

In the present situation also content of the strategic focal point 3 is relevant. In a longer run following questions will perhaps be relevant:

Should skills be wide or narrow? It is cheaper and easier to produce narrow than wide skills by education and training. On the other hand, wide skills are more secure. Occupational mobility is easier, when skills are wide. As a result labour markets too would become more flexible.

Theory or practise? For some persons learning theory is difficult. Should training also be differentiated according to learning ability and motivation as employment services will probably be differentiated according to the employability?

Near teaching or distance teaching/virtual training? What is the optimum in accordance with cost benefit analysis between cheaper distance learning and more expensive class teaching?

The strategic training focal point is analysed with scenario of centralised development and the scenario of decentralised development. Growth is accumulative in the scenario of centralised development. In the regional level the growth concentrates on university towns and the companies invest in key workforce. The training of workforce from the periferal areas will be left to the individuals and for the society. The development will result in drop outs and displacement. In the scenario of decentralised development “small is beautiful”. Learning brings the places that are in displacement danger such as certain areas, companies and individuals to their own development path.

2.4 Development of human capital to support entrepreneurship and quality of working life and utilisation of research and technology

The content of the strategic focal point 4 is very relevant especially in regional, individual and company levels. But, in addition, there is also community level, where is located innovative milieu. In innovative milieu collective learning occurs; fences between social classes are low; community has cohesive norms, remarkable performance motive and youthful way of life; information flows without barriers; older entrepreneurs support younger entrepreneurs, older workers support younger workers (no formal mentor or tutor projects needed); physical infrastructure and interest groups are supporting community; expertise is developing; participants do not feel that they play zero sum game: if you benefit, I will also benefit sometimes in some ways; reaction to the chances in environment are flexible and fast; mobility is great; there is networking inside the community and to the outer world.
Innovative milieu is a social process, which has many components. Projects in present situation strengthen some of those components. If those components happen to be bottlenecks in a critical path, then effectiveness is great. If not, effectiveness is weak because process goes forward at the speed of the weakest component. – Taking into account social environment more precisely would probably offer new possibilities to the focal point 4.

Scenarios of strategic human capital focal point are to do with competition abilities. In a good competitiveness scenario human capital strengthens when the right technology (research, investments and education) is used strongly enough and at the appropriate time. This will reflect the speed of growth, but can affect the entrepreneurship negatively, because entrepreneurship has a compulsory motive in Finland. In the scenario of deteriorating competitiveness ability, entrepreneurship, in the other hand, has an important role. The lack of jobs drives people towards entrepreneurship and at the same time the appreciation of entrepreneurs growths rapidly, because they are seen as the last clutch to the straw.
CHAPTER 3.

Analysis of the Internet survey

Summary: Evaluation of the strategic focal points of the ESF in Finland

3. ANALYSIS OF THE INTERNET SURVEY

Internet questionnaire was targeted to 1374 projects in objectives 1, 2 and 3 and EQUAL. Answer rate was 69 %, which is 949 answers. In the following I will present some results.

Table 1. Importance of strategic focal points in programmes. Means of the answers to the question “In the project, how much are the following strategic focal points emphasized? (0 = not at all, . . ., 5 = very much)”

<table>
<thead>
<tr>
<th>Programme</th>
<th>N</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whole material</td>
<td>944</td>
<td>3.2</td>
<td>3.1</td>
<td>3.8</td>
<td>3.3</td>
</tr>
<tr>
<td>North Finland objective 1</td>
<td>162</td>
<td>3.3</td>
<td>3.1</td>
<td>3.9</td>
<td>3.9</td>
</tr>
<tr>
<td>East Finland objective 1</td>
<td>99</td>
<td>3.3</td>
<td>3.0</td>
<td>3.9</td>
<td>3.6</td>
</tr>
<tr>
<td>West Finland objective 2</td>
<td>105</td>
<td>2.8</td>
<td>2.6</td>
<td>3.8</td>
<td>3.7</td>
</tr>
<tr>
<td>South Finland objective 2</td>
<td>74</td>
<td>2.8</td>
<td>2.8</td>
<td>3.4</td>
<td>3.5</td>
</tr>
<tr>
<td>Objective 3</td>
<td>469</td>
<td>3.3</td>
<td>3.1</td>
<td>3.8</td>
<td>3.0</td>
</tr>
<tr>
<td>Equal</td>
<td>22</td>
<td>3.4</td>
<td>4.2</td>
<td>2.8</td>
<td>3.0</td>
</tr>
</tbody>
</table>

The strategic focal points are emphasized quite well in the programmes. The interesting result is that the focal points are not emphasized more in the objective 3 than in the other programmes although the focal points are priorities in the objective 3 but not in the other programmes. The focal points cover the potential target area of the Structural Funds so well that they will be automatically taken into account.

The objective 2 programmes have a different profile compared to the other programmes. The objective 2 programmes are concentrating on the focal points 3 (training) and 4 (human capital). Also community initiative EQUAL has different profile from compared to the others. It is concentrating on equal opportunities (focal point 2). In EQUAL training (focal point 3) has a very low weight. In all the other programmes the weight is bigger than the others or as big as second biggest. In a whole material training has the biggest weight. The Structural Fund programmes are after all training programmes—with the exception of EQUAL.

Correlation calculations showed that profiles in regional programmes (1 and 2) and EQUAL are mirror images of each other. They have significant negative correlations. Profile of the objective 3 is between these extremes. One interesting result is also, that horizontal themes (information society, equality between sexes, local partnership, sustainable development, and anticipation) have significant
correlations with each other and with the four strategic focal points. From this there is only one exception: horizontal equality theme does not correlate with the human capital focal point 4. High correlations tell that activity is cumulative. Most of the projects try to weight all of these good things.

Different ministries have their own profiles too. EQUAL has same profile as the Ministry of Labour. They emphasize the strategic focal points in the same way. On the other hand, the regional organization of the Ministry of Labour, the Employment departments of TE-Centres, have different a profile; there profile has some similarities with that of the Objective 3 Programme and the Ministry of Education. The Regional Programmes have same profile as the Ministry of Trade and Industry.

Large projects emphasize more the strategic focal points 1 (employment) and 2 (equal opportunities). The small projects emphasize more of the focal point 4 (human capital). The focal point 3 (training) does not correlate with the size of the project. Therefore, in the focal points 1 and 2 there are some economies of scale. In focal point 4 “small is beautiful”.

Good practices are reached (in order) in 3 (training), 2 (equal opportunities) and 1 (employment). In 4 (human capital) they are reached obviously less.

Regression models showed that a local partnership produces good practices better than anything else. They produce them two times more effectively than second best things: the focal point 3 training and the horizontal themes equality between sexes and anticipation (which also have statistically very significant effect on good practices). The local partnership creates good practices best in rural areas and in the most disadvantaged groups, where employability is weak. The good practices are reached in these cases best in small projects, in other words “small is beautiful”. Small is also beautiful in the quality of the working life projects. On the other hand, the local partnership does not work at all in the quality of the working life projects.

Employment effects are best reached in the bigger projects. On the other hand, good practices and innovations are best reached in small projects (except in South Finland objective 2 Programme). It is also important to notice, that economies of smallness are working only in certain kind of projects where individual solutions are tailored to the very greatly varying circumstances.
4. ANALYSIS OF MONITORING DATA BASE ESRA

First time in Finland monitoring data base is so good, that it can really help the evaluation. Most interesting results are in table 2.

Table 2. Financial structure and cost effectiveness indicators calculated from monitoring system (ESRA) according to the strategic focal point and program as an index, when the whole project material is 100

<table>
<thead>
<tr>
<th>Share of private funding</th>
<th>Total costs/ training days</th>
<th>Total costs/ (new and preserved work places) “Price of the work place”</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>Index</td>
<td></td>
</tr>
<tr>
<td>All, absolut</td>
<td>23</td>
<td>79 €</td>
</tr>
<tr>
<td>All, index</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>-1. Employment</td>
<td>19</td>
<td>83</td>
</tr>
<tr>
<td>- 1. Equality</td>
<td>10</td>
<td>43</td>
</tr>
<tr>
<td>-3. Training</td>
<td>15</td>
<td>65</td>
</tr>
<tr>
<td>-4. Human capital</td>
<td>39</td>
<td>170</td>
</tr>
<tr>
<td>- North Finland, objective 1</td>
<td>16</td>
<td>70</td>
</tr>
<tr>
<td>- East Finland, objective 1</td>
<td>16</td>
<td>70</td>
</tr>
<tr>
<td>- West Finland, objective 2</td>
<td>25</td>
<td>109</td>
</tr>
<tr>
<td>- South Finland, objective 2</td>
<td>28</td>
<td>122</td>
</tr>
<tr>
<td>- objective 3</td>
<td>26</td>
<td>113</td>
</tr>
<tr>
<td>- Equal</td>
<td>3</td>
<td>13</td>
</tr>
</tbody>
</table>

The share of private funding is 23 % in all the programs. It is largest in the human capital focal point (39 %) and smallest in the equality focal point (10%). The biggest share is in the objective 2 programmes and also in the objective 3 programme. It is marginal only in the Equal program.

The costs per training day are distinctively higher in the human capital focal point. In the other hand, if the qualifications and degrees are taken in the account then the difference towards other focal points disappears. Finally with relation to price indicator for workplace the human capital focal point is by far the cheapest and most efficient. The costs for achieving employment effects are only a fifth from the focal point for training and a third from the equality focal point and half from the employment focal point. Straight forward calculation does not take into
account that the strategic training and equality focal points have other goals than the employment effect and this should be taken into account when using the results.

The output (training days and degrees) is cheapest in Eastern Finland Objective 1 program and most expensive in Southern Finland Objective 2 program. Jobs are cheapest in Western Finland objective 2 programs and most expensive in Equal community initiative program. The price of a workplace is triple in Equal program (which has some of the most difficult cases) compared to the ESF average and compared to objective 3 program. The price of a workplace in South Finland objective 2 is also a bit higher than the average.

The prices of the workplaces have to be understood as relative prices. If the absolute prices really were true as net prices then all the possible resources should be centralised for the production of employment effects and no other employment or regional policy should be necessary. Nevertheless, if all the resources were used at the same time a shortage of labour would occur. The assumption that previously mentioned numbers measure the relative prices is based on an assumption that a systematic error occurs. Price of the workplace is too low. This error is assumed to be distributed evenly according to different programs and different strategic focal points.

Cost effectiveness indicators are only one criterion, by which programmes and strategic focal points can be analysed. Results should be taken carefully and only indicatively. Programmes and focal points have also other goals than employment effect. In some focal points (especially training) these other goals are dominant. Quantitative indicators for those other goals are needed.

Monitoring database should be developed also because there are some deficiencies in reliability. Some variables, which are estimated by administrators by using project applications, are not enough reliable. It turned out that internet survey was more reliable than ESRA monitoring data base concerning just variables, which administrators assess. Best knowledge from projects is in projects, not in ministries far from projects.
5. MATERIALIZATION OF STRATEGIC FOCAL POINTS IN THE PROGRAMS

The next “soft” analysis is based on evaluation reports and interviews. It complements the previously shown “hard” statistical analysis.

According to the evaluation reports, the implementation of all the programmes has gone generally very well. Nevertheless, in some cases the goals have been too low or too high already in the beginning which has naturally resulted in the measured achievement of goals. Details can be found from the evaluation reports. – In the following are presented some special features of objective 3 programme, of the regional programmes and of the Equal programme. Two last mentioned differ from the ESF mainstream picture of the objective 3 programme.

Objective 3 program

From the objective 3 programs we can conclude the following: The Operational goals have been reached mainly well, and in most cases very well. The special goals (the short term goals) have been reached well, some of them better then the others and some have been reached excellently. In the other hand the general goals (the long term goals) have been reached poorly or not at all. The strategic level evaluation emphasises the general goals when the priority level and program level emphasises the operation and special goals. Emphasis in horizontal evaluations is on special goals. Without the strategic level evaluation the whole picture of the programs effectiveness would have turned out to be too positive and this is not the fault of the evaluators. In the reports the positive customer feedback is emphasised more then the few comments about the projects marginal effect on the decrease of structural unemployment or on the growth in the age of retirement. Both the short term and the long term perspectives used on their own are too one sided.

Regional programmes 1 and 2

Main objective of the programmes is to promote economic development in the regions. Most effective is to draw measures from the regional development plans. In regions there are long run development processes, which can be promoted marginally by the projects. Of course most promising processes should be selected. This is done usually in the development plans of the regions. Usually, but not always, people in the regions know which are the most promising processes in their regions and what kind of projects would further most effectively these processes. Regional programmes 1 and
CHAPTER 5.

Materialization of Strategic focal points in the programs

Summary: Evaluation of the strategic focal points of the ESF in Finland

2 have been originally written bottom up, which is good. Probability to find right processes is then bigger. Probably is also bigger in finding right forms of action, most effective projects. Weather or not this materializes in practice should be solved by programme evaluations. At this stage, in the middle of the programme period, only preliminary results are available.

On the other hand, it is possible to go inside the firms and make structural chances there. This is also a long run process, which can take tens of years. But there are examples that even the branch of industry has changed after the successful project. This requires also thorough training of the employees, where ESF could have an important role. Generally speaking, deriving training needs from the development needs and especially structural chance needs of the firms is most effective, final outcomes are then greatest.

Thirdly production structure and social structure of the region also should be changed to correspond the needs of international competition and above mentioned development and structural chance processes in the region.

From these premises we can derive the content for strategic focal points 3 (training) and 4 (intellectual capital) in regional programmes. Because the situations are very different in different regions the contents of the focal points are also different. There are also major differences on how the not growth, more social and usually more short term focal points 1 (employment) and 2 (equality) are emphasised. This is also a question of value. In the objective 1 programs, these are emphasised more than in the objective 2 programs. Inside the Southern Finland objective 2 program the equality focal point has been emphasised in Kanta Häme. Especially the emphasis on equality between the sexes is a question of opinion and a question of value.

Transnational Community Initiative Equal

The next generation program concept is experimented in Community Initiative Equal program. In this program there is a planning stage, implementation stage and circulation, mainstreaming of results phase that should be applied for separately from a different budget. All the projects have international partners. Interest groups have been officially connected to implementation. Because of that projects are called development partnerships (DPs). At this point the concept sounds promising, but we can not say much about it at the moment. According to the program evaluator it would be good if the results were utilized as much as possible. The real time learning during the programs action time should be strengthened. There are expectations especially towards what the program would have to give for the employment service centres which are about to start up and also for the new social entrepreneurship action models. In Equal, the participation of the clients in project activities, client’s impact, allocation towards different client
groups and the development of partnership model has been very well achieved. In the other hand, research and attendance of authorities and the third sector have been badly achieved.

Equal program targets the groups where employability is lowest. In other programs these are placed in focal points 1 (employment) and 2 (equality).
EU affects the employment policy in Finland in principal in two different ways: via Europe’s employment strategy and via structural funds (including Europe’s social fund ESF). Europe’s employment strategy is taken into account in the yearly National Action Plans, NAP. With the EUs categorisation (four pillars), what has been done and what will be done is demonstrated. From the ESF side the wide project equipment is also been demonstrated. Comparison is on order, when the same goals are trying to be reached with two different ways.

Table 3. Comparison between ESF and national politics in 2002. Summary.

<table>
<thead>
<tr>
<th></th>
<th>National</th>
<th>ESF</th>
<th>ESF, when National = 100</th>
</tr>
</thead>
<tbody>
<tr>
<td>People who started in measures</td>
<td>128,712</td>
<td>159,818</td>
<td>124</td>
</tr>
<tr>
<td>Corrected number of started people</td>
<td>114,586*</td>
<td>156,142*</td>
<td>124</td>
</tr>
<tr>
<td>Training &amp; measure days</td>
<td>12,700,000*</td>
<td>3,358,811</td>
<td>26</td>
</tr>
<tr>
<td>In a measure from a year</td>
<td>0,5045*</td>
<td>0,0977*</td>
<td>21</td>
</tr>
<tr>
<td>Duration of the measure, days</td>
<td>111</td>
<td>21,5*</td>
<td>21</td>
</tr>
<tr>
<td>Persons in a measure an average</td>
<td>59,300</td>
<td>15,259*</td>
<td>26</td>
</tr>
<tr>
<td>Unemployed from people started %</td>
<td>85,3*</td>
<td>16,6</td>
<td>19</td>
</tr>
<tr>
<td>Long term unemployed from started %</td>
<td>33,0</td>
<td>3,7</td>
<td>11</td>
</tr>
<tr>
<td>Costs of state, million €</td>
<td>530</td>
<td>133,9</td>
<td>25</td>
</tr>
<tr>
<td>Costs of state and ESF, million €</td>
<td>530</td>
<td>221,8</td>
<td>42</td>
</tr>
<tr>
<td>Costs of state per days in a measure</td>
<td>42</td>
<td>26</td>
<td>62</td>
</tr>
<tr>
<td>Costs of state &amp;ESF/days in a measure</td>
<td>42</td>
<td>52</td>
<td>124</td>
</tr>
<tr>
<td>Costs of state/ in a measure an average</td>
<td>8,938</td>
<td>8,775</td>
<td>98</td>
</tr>
<tr>
<td>Costs of state &amp;ESF/ in a measure an average</td>
<td>8,938</td>
<td>14,536</td>
<td>163</td>
</tr>
</tbody>
</table>

* = an estimate

Statistical comparison showed us that there were 24 % more people starting in ESF measures in year 2002 than in the national measures. Nevertheless, there were only 24 % training and action days in ESF compared to the national level. The difference is explained by the difference in time used for these projects. The length of the national measures is on average 6 months when in ESF measures only last for one month. There were 26 % of people in ESF measures compared to the national measures. From the people participating in these measures 85 % were unemployed in national measures when only 17 % were unemployed in ESF measures. 33 % were long-term unemployed in national measures and 4 % in ESF. The cost for the state for the ESF measures was ¼ from the labour market.
political measures (including labour market training) national costs. The costs per day for the state and ESF together were 24 % higher compared to the costs for the state in national measures. If using this calculation, then training and production of action day is one quarter more expensive in ERF compared to the national measures. In the other hand, if only the costs for the state are taken into account in ESF then one training&action day is only 2/3 of the cost of a national training&action day. If we finally take into account the costs for the municipalities and the private sector then the cost effectiveness of national policy is clearly bigger the mentioned 24 %.

The profiles for the ESF and national politics are very different. The national employment policy concentrates on people with lower productivity and therefore in a worse position, especially the unemployed. In these groups reaching effects is more difficult. More long term measures are required. In addition to this, people in employment do not have the time to attend training courses lasting for six months, which the unemployed in the other hand would have the time for.

In the following, using the definition of strategic focal points objective 3 program, comparison is done based on Europe’s employment strategies four Pilars in NAP.

Table 4. Comparative analysis between ESF and Europe’s Employment Strategy via NAP. - From ESF the strategic focal points and objective 3 programs priorities and measures. From Europe’s employment strategy National Action Plans (NAP) Pilars

<table>
<thead>
<tr>
<th>Strategic focal points</th>
<th>Pillars</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Exploitation of the demand for labour and promotion of employability</td>
<td>++</td>
</tr>
<tr>
<td>1.1 Employment of unemployed to open labour markets and for securing availability of labour for enterprises</td>
<td>++</td>
</tr>
<tr>
<td>1.2. New action models for transition from schools to employment</td>
<td>+</td>
</tr>
<tr>
<td>2. Promotion of equality and equal opportunities in working life</td>
<td></td>
</tr>
<tr>
<td>2.1. Furthering the equality between the sexes in education and in working life and the strengthening of women’s position in labour markets</td>
<td>++</td>
</tr>
<tr>
<td>2.2. Activation of Occupational training and decreasing of quitting education.</td>
<td>+</td>
</tr>
<tr>
<td>2.3. The support for groups in weak labour market positions.</td>
<td>+</td>
</tr>
<tr>
<td>3. Improving the quality and effectiveness of education and training, promoting occupational mobility and strengthening the relationship between education/training and working life</td>
<td></td>
</tr>
<tr>
<td>3.1. Improving the quality and effectiveness of training</td>
<td></td>
</tr>
<tr>
<td>3.2. Furthering the occupational mobility and strengthening the relations between training and working life</td>
<td>(+)</td>
</tr>
</tbody>
</table>

Summary: Evaluation of the strategic focal points of the ESF in Finland
Summary: Evaluation of the strategic focal points of the ESF in Finland

The comparison between the content of ESF’s and Europe’s employment strategy accomplished the following findings. In the measure level (measures from objective 3 program) the dependencies are comparatively clear. Pillar 1 (improving employment) covers fairly equally the different strategic focal points (the whole employment politics) but hardly any areas of the education politics. Pillars 2, Furthering of employability, 3 adaptability and 4 equality are strongly focused on certain measures. From the strategic focal points, training (3) has the weakest link towards pillars. The measure developing teaching methods 3.1 has hardly got any connection with the pillars.

The added value of Europe’s employment strategy to the national politics does not come from categorization of pillars but from more comprehensive approach. The comprehensiveness appears in two ways: Neither in ESF nor in NAP the ministerial borders are respected but the approach is more border crossing. This forces the different administrations and the different social partners into co-operation. Secondly there is a movement in NAP also in depth direction at least to certain extend to constructional level. The situation is analysed almost yearly taken into account the structural changes happening in the background.

The conclusion is that the complementariness of ESF and the support for the national politics is relatively extensive even though in the project level the action is taken often with no knowledge of the other.

Comparison of ESF to big national projects produce the result that national projects are more flexible and because of that the results seems to be a little bit better in national projects. Administration is more technical in ESF than in national projects where it is fuller of subject matter.

Table 4. Comparative analysis between ESF and Europe’s Employment Strategy via NAP. - From ESF the strategic focal points and objective 3 programs priorities and measures. From Europe’s employment strategy National Action Plans (NAP) Pillars (continues...)

| 4. Development of human capital to support entrepreneurship and quality of working life and utilization of research and technology |
|---|---|
| 4.1. Increasing and developing entrepreneurship | ++ |
| 4.2. Furthering the knowing how and capabilities in work | + |
| 4.3. Exploitation of research results and technology and furthering the cooperation between business sector and research sector | + |
| ++ = very strong relationship |
| + = some relationship available |
| (+) = only weak relationship available |
7. CONCLUSIONS

We have to realise that recognising strategic focal points in the programs happens regardless of if the focal points are taken into account in the structure of the program. This is because the strategic focal points cover very well the area of content of the current programs. The most significant issue with the strategic focal points is that they offer the equipment needed for analysis; the frame of reference for the planning, implementation and for evaluation of the programs. With regards to evaluation this evaluation report is an example.

Generally speaking; in the regions ESF is considered useful. Projects that support the national politics have been started and this would have not in many cases been possible without the funding from ESF. In regions some of the projects are also considered to be innovative. Nevertheless, the program evaluators are a bit sceptic with regards to innovativeness in the programs.

The total assessment is that the strategic focal points are a useful analyse tool for the comparative analyses of the content of the programmes and for evaluation. The strategic focal points cover almost all of the content areas of the programs. If the evaluations of the project leaders are used as the criteria then the scope is 2/3. The most significant subject matter left outside, from a strategic point of view, is the structural and law related things that constrict effectiveness of programs, but which the programs can not effect. In the national evaluation of Europe’s employment strategy even the previously mentioned things were analysed; as an example employment effects of tax reforms. At least in the strategic considerations these structural long term factors, the development trends related to them and alternative scenarios should be kept in mind also in ESF (as has been done in this evaluation). To a big extend the immigration and the shortage of labour, (which are the central focal points if the growth is comparatively fast) are now left out from the programmes. Nevertheless they will be brought along to the strategy of labour market policy in 2003 - 2007- 2010.

The Finnish program works relatively well with regards to the strategic focal points of ESF’s frame of reference. It should not be changed in the middle of the program period, even though some improvements could be made concerning the location of measures in priorities. Nevertheless, if we reach the faster growth, as has been anticipated, the control of shortage of labour and labour shortage based immigration should be emphasized more.

Different programs have a different partial impact for the strategic focal points. The profiles that were summarized earlier are sensible and are logically related to the fact that the programs serve different needs.
8. RECOMMENDATIONS

Recommendations are mainly derived from “hard” analysis: from the analysis of the Internet survey to the projects and from the analysis of monitoring database.

1. Financial models for the continuation of the best practices after the end of the program period should be developed.
2. Projects role should be more specified in relation to the other national actors.
3. Part of the production of the social innovations should be rearranged.
4. New small actors required for the making of the tailored innovations with the help of the new action models.
5. Partnership projects: good practices for prevention of the displacement and for the development of rural areas.
6. Need for the development of the good practices and the creation of the innovations especially with regards to the projects from the strategic focal point 4 (human capital).
7. The strategic focal point concept should be developed especially in relation to the services and especially with regards to the public services.
8. The strategic focal points 3 (training) and especially 4 (human capital) should be emphasized more in the third sector projects.
9. Projects from the strategic focal point 4 (human capital) should take into account a possible displacement effect with competing firms.
10. Projects that do not emphasize any strategic focal points or horizontal theme should be put under special observation.
11. Western Finland’s objective 2 program deserves a distinction and a reward for producing employment effect much cheaper than the other programs (employment effect is ESF’s main goal).
12. Eastern Finland’s objective 1 program deserves a distinction and a reward for producing training and qualifications cheaper than the other programs.
13. The role and volume of strategic focal point 4 (human capital) should be strengthened if the employment effects are emphasised.
14. Monitoring indicators should still be developed.
15. New actors should be brought along to carry out the projects.
16. Project level connections towards national policies should be strengthened.
17. More contextual advice and support for the programs.
18. Support with project action for the employment service centres and social firms.
19. The following areas should be emphasised in regional programs; 1.) long term process perspective 2) Internal structural chance of enterprises in the long term 3) The regeneration of the production and social structures.
20. Alternative action models should be developed for the strategic employment focal point in case of different employment situations.
21. The structure of the program should be considered again in the next possible program period.
Finland’s ESF frame of reference for 2000-2006 sets the framework for the European Union’s Structural Fund policy, which is to be implemented in the period in question and which will develop human resources and promote employment. The frame of reference is applied in the Objective 1, 2 and 3 Programmes and in the EQUAL Community Initiative.

The ESF frame of reference is based on four strategic priorities¹ and five horizontal emphases. As distinct from the strategic priorities, the horizontal emphases or themes (local partnership, the social dimension of the information society, gender equality, the principle of sustainable development and anticipation) will be taken into account in all ESF project activity. What makes the evaluation of the themes interesting is that a more precise role or function of the horizontal themes as part of ESF activity is not actually defined in the frame of reference alongside mainstreaming in principle. It was really only in the appendix to the request to tender for the frame of reference evaluation delivered in 2001 (i.e. eight evaluation questions relating to the information society theme) that concrete objectives relating to the theme to be evaluated were listed. In spring 2002, a survey of the mentioned evaluation questions was prepared in an interim report of the evaluation and they will be addressed again at the end of this final report.

In the frame of reference, information society and its development are nevertheless defined as part of the implementation of ESF measures. The said horizontal emphasis “appears in post-industrial society as an emphasising of new areas of expertise, as the exploitation of information technology capacities and opportunities, and as a reinforcement of work and learning structures that produce new information”. Noteworthy in understanding the information society in this way is the strong social dimension in its narrow sense contained within the ESF definition.

¹ 1) utilising demand for labour and promoting employability, 2) promoting equality and equal opportunities in working life, 3) improving the quality and impact of education, promoting occupational mobility, and improving the integration of education and working life, 4) developing skills capital to support entrepreneurship, the renovation of working life, and the utilisation of research results and technology.
CHAPTER 1. Introduction - Evaluation Assignment

Summary: Social Innovativeness as a Challenge

The purpose of the evaluation in question is to produce for the client a reliable picture of the realisation of the information society theme in the implementation of ESF measures, i.e. the projects and development partnerships, of the six programmes. In the evaluation guidance the task of the evaluators is defined as the four-point analysis of ESF measures:

1. A quantitative and qualitative analysis of projects in which the coherence of the measures is examined in relation to aims specified in the Objective Programmes, the distribution of measures by target group and the relevance of the thematic classification as far as the theme is concerned.
2. An evaluation of the implementation of projects examines mainly the efficiency of administration and the implementation of the partnership principle in programme and project work.
3. An evaluation of the impact of projects compares achieved results with set objectives as well as relevant effects in terms of information society development.
4. An evaluation of the justification of the projects; in other words, has the work yielded any benefit? Is the horizontal theme justified in programme work? Have any changes occurred in the operating environment? Is the programme and project work the right way to promote the social dimension of information society development?

The result of the evaluation is an analysis as well as conclusions about the implementation of the emphases of the themes and the effectiveness of measures, plus recommendations for the development of measures in the future. In addition, an attempt is made in connection with the evaluation to find and report on good new operating models. The development of evaluation methods has been mentioned as one aim of the evaluation. In the evaluation’s interim report we answered the first two evaluation questions. In this final report we deal with the two last-mentioned evaluation questions: does the information society emphasis yield any benefit for goal-directed project activity; and does ESF project activity yield any benefit for information society development?

In the interim report of spring 2002, the evaluation focused on the role of the information society in six different programmes, in the administration, planning and implementation of ESF projects, and in the results to be expected (i.e. the information society potential). In this, the final report of the theme evaluation, it is appropriate to focus on the evaluation of the impact, effectiveness, benefit and operational continuity of the horizontal emphasis in question.
2. EVALUATION MODEL

A phased theme evaluation approach (adapted) has been used as the methodological frame of reference of the information society theme evaluation. This method has not been used in Finland at all. For this reason, it was anticipated that, by applying the evaluation model, we would achieve added value from both a methodological and a content perspective which could be exploited in the evaluation of national measures. The use of the method is therefore also an indication of the application of good European practices in the context of the implementation of national programmes.

In the phased approach, a thematic assessment matrix is constructed for the theme to be evaluated, and this is used in the evaluation to identify questions relevant to the theme.
3. DATA AND RESEARCH METHODS USED IN THE EVALUATION

In as far as the evaluation focused on the results and analyses of two questionnaires, other data used in terms of the interim report were the Objective 1, 2 and 3 Programmes (including the ESF frame of reference) and their supplementary sections as well as EQUAL Community Initiative documentation. A separate mention is worth making of discussions held in connection with a meeting that took place at the end of January 2002 with evaluators of the Objective 3 Programme as well as an exchange of views (including evaluation questions) with those responsible for ESF matters in the Ministry of Employment. Research literature covering the fields of evaluation and the information society was also utilised where applicable throughout the preparation of this evaluation report. The evaluation report’s summary and development recommendation sections are based on triangulation between all the researchers in the evaluation team, in other words the report’s conclusions and development recommendations, as well as the evaluation questions adjusted for the final report, have been approached from the perspective of both information society and ESF-project expertise.

Data collection for the final report of the information society theme evaluation was determined to a large extent by a choice made by the evaluation team as a result of which the analysis of the impact of the theme was based on the four priorities instead of the six programmes. The impact, significance and relevance of the theme will be analysed in this report on the basis of observations presented in the section “ESF frame of reference information society concept and strategic priorities” (3.1) of the interim report. The purpose of the section in the interim report was to cast light on the frame of reference from an information society perspective. Special attention was also paid to the evaluation final report’s big question about the social dimension of the information society, on the one hand supporting the achievement of the aims of ESF project activity, on the other as an operational objective.

A survey questionnaire conducted in August-September 2002 on the ESF projects of the six programmes was used as the main data of the final report. This was a sample-based questionnaire sent to 234 projects. The basic group of the systematic sample (i.e. every fourth) consisted of the ESF projects that answered a questionnaire conducted by the frame of reference evaluators in late 2001/early 2002. After two rounds, the electronic questionnaire, based mainly on open questions, was answered by 136 project managers. When one takes into account the number of polite refusals and the projects that belonged to the sample but which had already ended, the response percentage was a fairly respectable 62%.
Alongside the thematic content analysis of the programmes, of the other evaluation research methods used one can mention the qualitative processing of the survey’s open questions with the ATLAS\textsuperscript{ti} program. In addition, the case study method was also applied in the evaluation for the localisation and examination of project-level information society practices. Both in the method elements and in the discussions of the inter-administrative group that handled the interim report, there arose the question of (or need for) highlighting concrete aspects of the information society and its so-called good practices. For this purpose, the evaluation questionnaire was constructed to a large degree so that the respondents themselves could determine the content and “purpose” of the ESF frame of reference priority in question. In the report, with the aid of seven project examples or case descriptions, we present in more detail how the information society looks from the perspective of the ESF projects.

**The information society as a means of developing ESF activity**

The question of the information society’s means dimension can be approached via the general subareas by which the concept of the information society itself can be approached. In the background is therefore the general question of what can be considered to form the core of the information society. To this question have been offered answers such as information or knowledge, technology, an informational or information-based economy, information-based forms of organisation or the social relationships of an information-based society.

In these definitions there are certainly clear basic differences. The perspective that emphasises information connects the formation of the information society to the epistemic dimension, which defines all activity, while in the perspective that emphasises technology the corresponding dimension consists of technological innovations and their development effects which facilitate new activities or connections or increase efficiency. The perspective that emphasises the economy elevates to a special status the social subsystem that describes the exchange of materially measurable values in human and social life as well as the form and extent of this exchange. The organisational perspective emphasises the information society as a general form of social activity and particularly of cooperation and interaction which is determined by the rules that frame this activity. The widest perspective is the social theory view, in which attention is fixed on social structures that condition human action. All these are in their own way functional perspectives on the information society, as long as they are not interpreted too objectively or in a reductionist way (in reductionism the information society as a phenomenon is explained by returning it to some more narrowly definable phenomenon such as, for example, technological development, changes that have occurred in the role of information, or something similar).
The prerequisites for realising means

Based on general classifications, it is considerably important to identify the subareas for which related “means” can be raised both by received experiences and justified expectations into a subject of closer examination.

One of the key questions in terms of the objectives of ESF activity is that the “means” of the information society do not often form a sufficient condition to allow the human resources connected with them to develop and the effects that promote employment to be realised. This question is linked to the question of the impact and effectiveness of social policy interventions and the nature of their influences.

Generally speaking it seems that the factors that constitute the information society form conditions for each other through their mutual relations. For example, a good information technology capacity does not help in a situation in which the economic realities of the sector in question do not enable the exploitation of these skills due, say, to market development prospects. On the other hand, certain factors can form special reinforcing structures, such as a lack of positions in the academic sector, the general emancipation of women in its different forms in female entrepreneurship etc. The major questions relating to boundary conditions are: economic conditions, technology prerequisites and institutional boundary conditions. Viewed from this perspective, the exploitation of certain means of the information society appears to be tied to several dimensions that constitute the information society, and sufficient attention should be paid to their synchronisation and to an investigation that casts light on their mutual links.
4. RESULTS OF THE EVALUATION’S FINAL REPORT

The information society as part of the exploitation of labour demand and the promotion of employability (priority 1)

The information society relevance of priority 1

From the perspective of information society development, opportunities to promote the efficiency of the labour market and to strengthen expertise are identified in respect of priority 1. Particular potential is to be found in the “operational” enhancement of the matching of labour demand and supply as well as in the development of labour services. In these areas information and communications technology applications can promote employment in a significant way. Another important subarea is connected with the role of different levels of “information society skills” in the development of professional expertise either as a core area or as technical-methodical expertise supporting content know-how. As a third strength it is also worth mentioning regional employment strategies, local applications of the partnership model, the strengthening of networks and the exploitation of third sector potential, in the implementation of which the opportunities provided by the information society can be exploited.

The weaknesses (limitations) of the priority are tied in with macro or structural level problems, at the heart of which is the tightening of the general conditions of the global competitive economy. It is difficult to improve employment in a sustainable way so that employment opportunities would open up to those who are poorly educated, to the long-term unemployed and to job applicants possessing limited working experience. This characteristic is associated with the fact that the general level of expertise that promotes employment is rising as the influence of the information society and globalisation strengthens. One of the major weaknesses of this priority, examined in terms of information society development, is the finding of sustainable solutions for the employment of the long-term unemployed and partly also of young people.

Evaluation summary and interpretation of the information society emphasis as part of priority 1

Based on the evaluation data, we can broadly state that the information society emphasis in employment priority ESF projects is displayed in a rather unsurprising way. Instead of the new and innovative procedures sought for the frame of reference, the project concepts are quite conventional and focus mainly on promoting the employability of unemployed target groups (i.e. supply of labour). When listing the strengths and weaknesses of the information society above, we stated...
that the main added-value opportunities in the case of priority 1 are connected with the strengthening of the information society skills of labour and with promoting the matching of labour supply and demand in terms of information technology. Correspondingly, we consider to be a weakness the labour market’s macro and structural level problems, such as specialisation of labour demand independent of information society expertise.

ESF projects’ link with the information society is related in most cases to IT courses etc. arranged as one form of training within the projects. In connection with or as a consequence of this, in many cases the participants used the information networks as a tool for acquiring job application or labour market information. According to the project managers, the skill to find jobs with the aid of the Internet, for example, has a positive impact on the participant’s activity and independent action (i.e. self-assurance and job-seeking expertise). In this respect the important information society aspects of priority 1 project activity are located in precisely those areas where they might have been anticipated: the strengthening of information society expertise offered in ESF projects is significant in promoting the supply of labour. It is a matter of the individual expertise that is in many cases required of a job applicant, but which cannot – for example on the scale of a few weeks of practical IT training – be presumed necessarily to be decisively significant for the employment of the individual. The question of new information society procedures or social innovations to promote employment seems downright impossible by investing solely in the supply of labour.

The information society as part of the promotion of equality and equal opportunities in working life (priority 2)

The information society relevance of priority 2

In terms of the strategic priority in question, we can state that special, information society remedies for preventing exclusion and promoting equality are very insignificant. It is more a question of the opportunities by which solutions otherwise developed to prevent exclusion can be supported through information society instruments and other means. Exclusion in working life is emphasised in terms of special groups when it is connected with an increase of inequality (for example, ever-increasing qualifications in working life). The impact of information society opportunities on this matter will be insignificant without strong social policy involvement in the above-mentioned mechanisms that underpin inequality. This factor also sets – at least in principle – considerable demands on the substance of projects implementing the equality priority.

Belief in the power of education has been strong in our society, even among those who are segregated or threatened by exclusion. This has been strengthened further by the idea of the improving opportunities of the information society to
respond to the challenges in question. The situation is paradoxical, because the relatively poor impact of educational interventions in promoting these matters has been clearly shown.

In terms of gender equality, information society opportunities are connected with developing flexible working time and job solutions in relation to female entrepreneurship, work attendance and studying. A weakness is perceived to be education’s slow, to some extent even questionable, impact on equality. From an information society perspective, the definition of equality is, on the other hand, tied too much to the context of working life.

In this, to some extent, pessimistic summary of the information society concept in the second pillar of the frame of reference, we can state that it “stumbles” in respect of the excessive general optimism about the omnipotence of information and communications technology. Equality and equal opportunities are not primarily information society questions.

Evaluation summary and interpretation of the information society emphasis as part of priority 2
The basis of priority 2 is the promotion of equal opportunities in working life, which affects the whole of society. The objective is highly challenging when one takes into account, for example, that in the projects that answered this evaluation’s questionnaire more was spoken about the promotion of social participation in relation to other social groups. As in the case of rather many employment projects (see above), the connection of this priority’s projects with the information society is generally associated with information technology training. On the basis of the answers received, the significance of the information society is to offer target groups tools to build self-esteem and participation, which for its part can be seen as one small step in lowering the threshold of working life. On the basis of some answers one can even, in a slightly optimistic vein, speak of information society instruments and related education as a “window onto society”.

The information society as part of the improvement of the quality and impact of education, the promotion of occupational mobility, and improving the integration of education and working life (priority 3)

The information society relevance of priority 3
Priority 3 has, from an information society perspective, a considerable number of suitable and potential development interfaces. The new opportunities offered by the information society are most undeniably those by which higher quality education processes are created. Through distance learning, Internet-based study envi-
Ronments and the networking of education units, for example, it is possible to raise the quality of education uniformly, irrespective of where and how it is implemented. Diverse connections to working life are also linked to this quality.

The priority's so-called subpriority, namely the promotion of occupational mobility, is on the other hand a more difficult matter as far as information society development is concerned. Specifically, mobility is a question of transferring to new kinds of jobs in a new sector, transferring to new jobs in terms of content in the same sector, changing jobs e.g. through restructuring, or updating expertise in the same type of job. Potential in terms of the information society is chiefly connected with support for the last three dimensions mentioned.

In terms of improving the integration of education and working life, this is perceived from the information society perspective as above all an attempt to recognize the changing needs of working life and the educational challenges arising from it. Attempts are being made to reconcile these through means provided by the information society, for example by creating study-related solutions which, on the content level on the one hand and the operational level on the other, bring education closer to working life. In this respect we come close to the concept of occupational mobility mentioned above.

**Evaluation summary and interpretation of the information society emphasis as part of priority 3**

In project activity implementing the education development priority, the information society emphasis of the ESF frame of reference is in its element. Based on the so-called interface model of the ESF frame of reference, the emphasis is highly significant between the education and working life priorities, namely on the “new expertise structures of working life” interface. According to the frame of reference, the interface “measures must be based on the idea that the content and emphases of the education system should be developed with an open mind to accord with the altered requirements of working life”. On the basis of the answers of the ESF project managers, a roughly similar kind of role can be found for the information society emphasis in September 2002.

In terms of content, the development work of the third priority involves three objectives: developing the quality and impact of education, promoting occupational mobility, and improving the integration of education and working life. Instruments and means relating to the information society emphasis would first and foremost appear to have significance in developing education processes and as far as form (“speed, power, extent, networking and communication”) and content are concerned. The priority’s “education quality and impact” subemphasis is a matter of information: about new kinds of expertise and skills needs, better availability of information also in terms of quantity, and greater openness of educational content (“up-to-date precise information available to all”).

Summary: Social Innovativeness as a Challenge
The significance of the ESF emphasis evaluated here for occupational mobility is connected with information society information and skills, which the project managers perceived to be a prerequisite of mobility. Regardless of whether it is a matter of the significant transfer content-wise to new jobs in the same sector, the changing of jobs e.g. through restructuring or the updating of expertise in the same type of work, individuals are most probably required to have certain information society qualifications.

A reform of vocational secondary diplomas was initiated in 1999. Now the performance of three-year basic diplomas includes a work-study unit of around 20 study weeks. Based on the answers given in the evaluation questionnaire, the question of improving the integration of education and working life from the information society perspective is to a large degree connected with the development of work-study processes. First and foremost the application of information networks, databases and even e-mail seems to be significant in facilitating contact within the above-mentioned system, but in some cases also in developing the quality and impact of the education unit in question.

The information society as part of the development of skills capital to support entrepreneurship, reform of working life, and the exploitation of research results and technology (priority 4)

The information society relevance of priority 4

From the information society perspective the strength of the priority is connected above all with the diverse and extensive strengthening of skills capital as part of a national resource strategy. In the information society frame of reference, the measures of this subarea in promoting education and research activity and in connecting them to working and business life contain lots of strengths and new opportunities. As far these are concerned, worthy of note are opportunities to improve through information society development the promotion of multiple skills and occupational mobility, independent education and working capacity. Some special strengths have also arisen in areas where information society skills can be combined with content expertise. Features such as these appear in their different forms on the one hand in the exploitation of networks and value chains and on the other hand in the creation of new forms of entrepreneurship and business activity. Finally it is also worth mentioning the exploitation of the economic potential of research and development activity included within priority 4.

The fundamental problems of the business activity priority relate to bottlenecks in the development and exploitation of the expertise potential of personnel. For example, influencing organisations’ internal working arrangements is a complex and time-consuming process, whose implementation is hindered by, among
CHAPTER 4.

Results of the Evaluation’s Final Report

Summary: Social Innovativeness as a Challenge

Alongside the many opportunities, the challenges contained within the priority from the perspective of information society development are

- the extensive and diverse strengthening of skills capital so that, aided by the dynamics of business life and the labour market, it would be possible to create innovations more flexibly and quickly and to react to changes in the global operating environment.
- realising the importance of personnel resources and developing on that basis the internal structures of organisations and work.
- the strengthening of networks, partnership, social capital and internal entrepreneurship to create new economic activity and give rise to new economic relations between actors in a diversifying field.
- recognising the loading and problems of information professions and information-intensive special fields sufficiently early in order to prevent, among other things, burn-out and similar side effects.
- generating the economic added value of research and development activity by strengthening, among other things, productification and commercialisation capacity in key organisations.

Evaluation summary and interpretation of the information society emphasis as part of priority 4

Project activity of the ESF frame of reference’s fourth priority mainly involves the supporting of business activity. Based on the answers to the questionnaire, the main beneficiaries are existing SMEs. Goal-oriented development attempts to promote companies’ competitiveness by supporting and diversifying activities. One development opportunity is connected with the development of companies’ information society expertise, which, in the case 45 ESF projects, is the most common information society link of their projects’ activities. Alongside actual substance know-how, this kind of development is a question of promoting instrumental capacities. New expertise and improved information technology capacity fulfil a rather pragmatic but certainly a very justified role as part of the promotion of business activity. When it succeeds, the effort has, in our view, significance both for the renovation of existing jobs and the creation of new ones.

The first aspect of priority 4 involves the development of the skills capital that supports business activity. From the information society perspective, this means the exploitation of precise instrumental opportunities and information content – the opportunity to initiate operating models for transferring to the information society (cf. frame of reference guidelines). An aspect that correspondingly does not seem significant relates to the development of new forms of entrepreneurship.
and business activity. In the latter case, it is notable the views of project managers who answered the evaluation questionnaire have a strong “content is a prerequisite of development activity” perspective.

The priority’s final two development aspects, namely the renovation of working life and the skills capital that supports the exploitation of research results and technology, appear rather indistinct when examined through the “information society magnifying glass”. The renovation of working life (for example in terms of increasing qualifications of working life) would appear to some extent to be independent of the supply of information society skills capital, a slow process advancing of itself. Working life is reformed structurally and content-wise as part of general information society development. The instruments and means of the information society also do not appear to constitute a channel of added value in the linking of R&D know-how to the business priority’s project activity.
5. EVALUATION CONCLUSIONS

To what extent and in what respect does the information society emphasis support the achievement of the objectives of ESF-financed project activity?

Various classifications relating to the subject have been the main tools in outlining the information society theme and its significance. The priority’s area of application is defined by the frame of reference in one way, by the ESF authorities in another, by ESF projects in a third, and by the evaluators themselves in a fourth way. A fifth way of understanding the information society as part of ESF activity can be found from the eight evaluation questions of the client who commissioned the evaluation.

According to the frame of reference, the emphasis in question is apparent in the post-industrial society (1) as an emphasising of new areas of expertise, (2) as the exploitation of information technology capacities and opportunities (3) as a strengthening of work and learning structures that produce new information. On the basis of a content analysis of six programme documents wholly or partially financed by the ESF, all three “official” information society dimensions are rather well to the fore in the goal-directed content of the programmes, yet so that the emphasis is on new areas of expertise and the exploitation of information technology in its different forms.

Instead of the above division, the ESF authorities classify projects in relation to the information society impacts that are expected of them. The impacts that support the information society’s social dimension can be those that support (1) national services and applications, (2) SME services and applications or (3) the employability of participants. In other cases ESF projects are classified as neutral in terms of their information society impacts. At the turn of 2001/2002, according to the official classification, out of a total of 804 ESF projects there were, in terms of their information society impacts,

- 20 per cent classed as supporting national services and applications,
- 22 per cent classed as supporting SME services and applications,
- 26 per cent classed as supporting the employability of their participants.
Altogether 68 per cent of the projects in the “ESF project mass” were positive in terms of their information society impacts. This is quite a significant proportion. It is also interesting that when the project managers (N=938) themselves were asked, the proportion of projects deemed to be positive in terms of their information society impacts was exactly the same.

In connection with a joint survey of frame of reference evaluators, project managers were also asked how the projects they represent fulfil the ESF frame of reference’s information society definition or objective. On the basis of the results of the spring 2002 interim report, the information society most strongly appears in project activity as a highlighting of new areas of expertise, secondly as the exploitation of information technology capacities and opportunities, and thirdly as a strengthening of the work and learning structures that produce new information.

In the interim report we also conducted a review of the client’s eight evaluation questions which were appended to the evaluation’s request to tender. Utilising a so-called thematic evaluation matrix, we strove in the interim report to answer the said evaluation questions to the extent possible based on examples that arose in its project questionnaire. On the basis of the results of the interim report analysis, the information society was strongly to the fore in project activity (1) as an instrumental opportunity to increase participation and interaction between different actors, (2) in promoting the creation and availability of new information and expertise, (3) in promoting the capacities of citizens and (4) in the diverse exploitation of information networks in studying and teaching.

As one conclusion of the interim report, we stated that it is appropriate to examine the information society theme in its various elements by connecting it organically with its goal-directed implementation context. That, above all, is why the theme, irrespective of its evident opportunities, is from the perspective of added value strongly associated with many limitations and boundary conditions. In this respect the results of the interim evaluation (i.e. the results from 70 projects as classified by both the authorities and project managers were positive in terms of their information society impacts) beg the question of what the mainstreaming of the theme means in practice. In what context can we speak of ESF information society’s real added value in relation to the achievement of the project objectives?

For the above-mentioned purpose, the evaluation final report focused on the content and significances of the information society emphasis as part of the implementation of the ESF frame of reference’s four priorities. In contrast with the interim report’s “mechanical” organisation of the theme, in the final report the ESF project managers were themselves able to define on a general level the measures and instruments related to the theme in their information society project and, where possible,
the nature of the added value achieved by these means. The following table answers collectively, with the aid of various evaluation questions and classifications, how the information society emphasis appears in ESF project activity.

Table 1. A summative matrix of the impacts of the theme in different classes of selected criteria in respect of the ESF frame of reference’s information society emphasis.

<table>
<thead>
<tr>
<th>ESF frame of reference priority</th>
<th>information society link</th>
<th>link to objectives</th>
<th>relationship to the achievement of objectives +/-</th>
<th>target group, beneficiaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exploitation of demand for labour and promotion of employability</td>
<td>exploitation of demand</td>
<td>weak</td>
<td>weak</td>
<td>0</td>
</tr>
<tr>
<td>promotion of employability</td>
<td>moderate</td>
<td>moderate</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>The promotion of equality and equal opportunities in working life</td>
<td>gender equality</td>
<td>moderate</td>
<td>moderate</td>
<td>0</td>
</tr>
<tr>
<td>equal opportunities</td>
<td>moderate</td>
<td>moderate</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Improving the quality and impact of education, the promotion of occupational mobility, and improving the integration of education and working life</td>
<td>quality and impact of education</td>
<td>strong</td>
<td>quite strong</td>
<td>+</td>
</tr>
<tr>
<td>occupational mobility</td>
<td>quite strong</td>
<td>quite strong</td>
<td>+</td>
<td>students, mature students</td>
</tr>
<tr>
<td>integration of education and working life</td>
<td>quite strong</td>
<td>strong</td>
<td>+</td>
<td>students, companies, colleges</td>
</tr>
<tr>
<td>The development of skills capital to support entrepreneurship, reform of working life, and the exploitation of research results and technology (priority 4)</td>
<td>entrepreneurship skills capital</td>
<td>quite strong</td>
<td>quite strong</td>
<td>+</td>
</tr>
<tr>
<td>reform of working lifeskills capital</td>
<td>weak</td>
<td>weak</td>
<td>0</td>
<td>SMEs, employees</td>
</tr>
<tr>
<td>exploitation of research results and technology capital</td>
<td>weak</td>
<td>weak</td>
<td>0</td>
<td>SMEs, employees</td>
</tr>
<tr>
<td>ESF frame of reference’s information society definition (dimensions)</td>
<td>Evaluation’s interpretation of situation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>...as emphasising new areas of expertise?</td>
<td>In itself a significant part of ESF project activity – the essential point in this case is whether a new kind of expertise can be applied or whether it is a matter of developing capacities.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>...as exploiting information technology capacities and opportunities?</td>
<td>Compare the previous interpretation: in the case of the said capacities, the essential point is precisely the opportunity to exploit them.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>...as strengthening work and learning structures that produce new information?</td>
<td>The significance is primarily on strengthening learning structures that produce new information; work structures are slow-moving processes.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Client’s evaluation question:</td>
<td>Evaluation’s answer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have use and development of information and communications technology led to better participation opportunities and increased interaction between the different actors?</td>
<td>Yes. Information society tools and applications are highly significant in increasing communication, networking and interaction between the different parties.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have new information and expertise arisen and have their availability and exploitation opportunities improved (e.g. Internet use improved)?</td>
<td>Yes. The information society emphasis has key significance both in the creation of new information and expertise and in opportunities for its exploitation in principle.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have projects promoted the capacities of citizens, educators, the information industry and new media professionals?</td>
<td>To some extent, yes. As a good example we can mention the IT Future Centre project, implemented in cooperation with a polytechnic, its teachers and students as well as local companies.</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
CHAPTER 5. Evaluation Conclusions

Summary: Social Innovativeness as a Challenge

Have projects promoted the diverse exploitation of information networks in studying and teaching?
Yes, particularly in the case of priority 3 projects.

Has content production expanded and diversified in projects?
To some extent, yes, particularly in the case of priority 3 projects. For example, an attempt has been made to develop teaching content using networks. Furthermore, rather many ESF projects have invested in the development and accessibility of websites.

Have information society structures, hardware and network environments and related support services been strengthened in the area of education and research?
To some extent, yes. In terms of network environments, most development has occurred in the area of education.

Has mathematics and natural science expertise improved and has information industry training increased particularly in respect of women?
No. The question did not arise in the data collected and used by the evaluation.

Has commercialisation of research results and the creation of new business activity as well as the use and exploitation of technology for the good of the economy and employment been promoted, and what about the publishing of scientific information for citizens’ use?
Not at all. In project activity implemented under priority 4, for example, the focus is strongly on developing the substance of existing SME operations.

Actual evaluation questions

A quantitative and qualitative analysis of projects in which the coherence of the measures is examined in relation to aims specified in the Objective Programmes, the distribution of measures by target group and the relevance of the thematic classification as far as the theme is concerned.
From the perspective of ESF authorities and project managers, the information society is quantitatively measured well by the main dimension of activity. The classification of projects into those supporting citizens’ services and applications, SME services and applications, and the employability of their participants gives a too coarse picture of the added-value dimensions included in the emphasis (see evaluation development recommendations in the next section).

An evaluation of the implementation of projects examines mainly the efficiency of administration and the implementation of the partnership principle in programme and project work.
From the perspective of the said theme of the frame of reference, the information society is not at all significant for the efficiency of administration, but for the implementation of ESF projects (“speed – efficiency – extent”). The theme has a positive influence on the partnership principle.

An evaluation of the impact of projects compares achieved results with set objectives as well as relevant effects in terms of information society development.
The essential point in this case is whether we are speaking about the information society’s social dimension as a support to the objectives of ESF project activity or about the projects as an implementer of the said social dimension. In the case of priorities 3 and 4, it is a question of added value in relation to set objectives, in priorities 1 and 2 more the promotion of the social dimension (i.e. information society tools etc. in promoting participation).

An evaluation of the justification of the projects; in other words, has the work yielded any benefit? Is the horizontal theme justified in programme work? Have any changes occurred in the operating environment? Is programme and project work the right way to promote the social dimension of information society development?
The information society theme is a justified part of ESF-financed project activity precisely for that reason. The activity is of undeniable benefit to project activity overall, but not necessarily to achieving the objectives of all types of project (e.g. new jobs). Better targeted ESF project work is the way to promote the social dimension of information society development, for example in the form of social innovations (see the evaluation’s development recommendations).

Table 1. A summative matrix of the impacts of the theme in different classes of selected criteria in respect of the ESF frame of reference’s information society emphasis.

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<tr>
<td>Have projects promoted</td>
<td>Yes, particularly in the case of priority 3 projects.</td>
<td></td>
<td></td>
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<tr>
<td>the diverse exploitation of</td>
<td></td>
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<td></td>
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</tr>
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</table>
6. DEVELOPMENT RECOMMENDATIONS OF THE EVALUATION AND FURTHER THOUGHTS

Earlier this year, Sitra published the results and conclusions of a National Innovation System research programme in a report “Innovaatiojärjestelmän uudistumishaasteet” (Renewal Challenges of the Innovation System). The purpose of this very extensive and thorough research programme was to identify the weaknesses of Finland’s innovation system and to present concrete improvement proposals based on them. At the end of the report the writers presented eight challenges of Finland’s innovation policy:

- renovation of companies
- modernisation of traditional sectors
- development of skills-intensive services
- support for cooperation networks
- strengthening of basic research
- reforming the education system
- prevention of social exclusion
- developing cooperation between fields
- coordinating innovation activity

The innovation system forms the foundation of Finland’s information society. What is noteworthy in this approach is that the innovation system is considered to cover, as well as new technology, also factors that shape the economic structure, such as education, the labour market, social security and social regulation (“The whole of society has to be reformed in order to safeguard Finland’s competitiveness in a constantly changing world economy”). Maintaining and developing the innovation system on the sector level is a matter of the appropriate synergistic reconciliation of various policies – an approach in which attention must be directed above all to other parts of the system, where the greatest weaknesses and opportunities appear.

The four strategic priorities of Finland’s ESF frame of reference relate to the promotion of employment, the prevention of exclusion by promoting equality opportunities, the development of the education systems and the promoting of business activity. Against the background indicated by the challenges of the innovation system listed above, ESF activity is therefore to a great extent a matter of responding to the challenges of the country’s innovation policy. From the perspective of the information society emphasis of the ESF frame of reference, this is of particular interest.
The final report of the evaluation of the ESF information society emphasis is a matter of analysing the justification of the theme as part of the project activity of the six Structural Fund Programmes. In other words, is programme and project work the right way to promote the social dimension of the information society? It is also meaningful to approach this question from another direction, that is by asking whether the social dimension of the information society is an “instrument” for achieving the objectives of ESF activity.

In section 3 of the report we analyse thoroughly the question of the information society as a means and instrument. The basic message of the section relates to the fact that the information society can be approached from this perspective, but one should bear in mind that instrumental added value more often than not requires the “supporting influence” of many other social factors in order to be fulfilled. The following can be identified as factors and dimensions of this kind (for example from the perspective of new jobs and employability):

- economic conditions (e.g. entrepreneurship, competitiveness, market, profitability etc.),
- technological requirements (e.g. exploitability, utility and accessibility of technology and applications, infrastructure, integration etc.),
- institutional boundary conditions (e.g. legislation, institutional systems).

The main result of the evaluation interim report delivered to the client in spring 2002 was that a meaningful examination of information and its means etc. always requires a definition adjusted in the context of the implementation. Without this, all development activity that takes place in Finland can if necessary be termed information society development. For this reason it was decided in this report to examine ESF information society in the context of its projects. The questions of the evaluation questionnaire, such as “How is your project connected with the information society?”, “What are your project’s practical measures and means relating to the information society?” or “How do the instruments and means you mention promote the achievement of the project’s purpose?”, seek answers to how the implementation of the ESF frame of reference fulfils the so-called sufficient condition for the development of human resources and/or the promotion of employment.

Taking into account the “added-value” conditions, requirements and boundary conditions listed above, we discussed in section 3 – chiefly in relation to education – the impact of the information society on the micro, meso and macro levels. In the case of ESF project activity it is pertinent to address first of all the development of human values, i.e. the desired impacts on a micro level. Furthermore, for example in the case of priority 3 projects, an essential aspect – alongside individu-
al development – is the development of the activities of individual educational organisations (meso level). The biggest development challenge of the ESF information society is, on the basis of the results of this evaluation, macro-level development. The latter case involves the challenges of Finland’s innovation policy listed above, including the renovation of companies (e.g. the modernisation of traditional sectors), the reform of the education system and the prevention of social exclusion, examined in particular in terms of the frame of reference of ESF activity.

When examining the specific frame of reference, ESF activity is to a large extent a question of developing good operating models for the employment, entrepreneurship, education as well as the equality and equal opportunities interfaces. In some contexts we can also speak of social innovations in this respect. Information society instruments correspondingly provide opportunities for added value, in terms of ESF frame of reference priorities, particularly in the following areas:

**Priority 1:**
- promoting labour market efficiency and strengthening expertise (“operationally” enhancing the matching of labour demand and supply as well as developing labour services)
- offering different levels of “information society skills” in the development of occupational expertise
- innovation of employment and education models
- regional employment strategies, local applications of the partnership model, strengthening of networks, and exploitation of third sector potential.

**Priority 2:**
- the kind of entrepreneurial activity that involves telecommuting opportunities or otherwise flexibility in terms of the time and place of working
- learning in work
- studying resulting in new working tasks that arise through information society development
- independent and self-directed study.

**Priority 3:**
- a basic education structure that produces broad competence, supplemented by a more extensive further education programme and dedicated training that answers the challenges posed by rapid change
- learning in work, support for activity according to personal study plans, and exploitation of flexible and open learning environments in general
- recognition of changing needs and the educational challenges they pose (study-related solutions that on a content and operational level bring education closer to working life)

Summary: Social Innovativeness as a Challenge
- improving the integration of working life and education (flexible forms of study, labour mobility, distance learning, new learning environments and permanent links to working life).

Priority 4:
- diverse and wide-ranging strengthening of skills capital (education, research and development work, and their links with working and business life)
- the promotion of multiple skills and occupational mobility, independent education and working capacity
- the combining of information society skills with content expertise in different fields (e.g. the exploitation of networks and value chains as well as the creation of new forms of entrepreneurship and business activity)

To conclude the report, we bring together views, based on what we have stated above, about 1) the challenges of Finland’s innovation system, 2) the conditions, requirements and boundary conditions of the information society’s instrumental added value, 3) the different levels of examining impact, 4) the opportunities of the ESF frame of reference’s four priorities, and our development recommendations in respect of the information society emphasis for the final four years of the programme period are as follows:

1. From the information society’s (IS) viewpoint in applying the ESF frame of reference one should reach further to take integrate standpoints into account. In order to anchor the ESF activities more effectively to the existing institutional systems the cross-sectoral boundaries should be lowered in the first place.
2. The obvious IS possibilities in ESF frame of reference should be recognised better at different levels (central and regional ESF administration, ESF projects). The possibilities should be clarified for example in terms of practical ESF project work experiences taken advantage of IS theme
3. Instead of rhetorical implication the real sense of the innovativeness should be functional in the ESF frame of reference in applying it.
4. Partly following from the previous recommendation, in the ESF activities in information society one should pay special attention to in which way the technical know-how is possible to couple with the substantial skills in different branches, and furthermore to business know-how creating economical values
5. The Finnish information society lays on basis consisting of economical-, social-, employment-, regional- and educational political fundamentals. Therefore the ESF activities should concentrate on structuring clearly additional
solutions based on means of the information society. These IS solutions would emphasise for example on increasing flexibility, the ability to meet the challenges and contributing equity and equality in general.

6. One has to search and experiment innovative approaches and solutions in order to stimulate both the demand and supply on labour to better meet the blackspots in meeting one’s match

7. The ESF actions should be integrated into strengthening the social dimension of “labour involvement” of the Finnish information society: every unemployed applicant offered basic skills for example on exploiting data networks on seeking job. Simultaneously the IS used as ”an expediment” on building more equal information society.

8. In order to develop the information intensive service branches in the ESF context, one should target focused measures based on the idea of project trading (i.e. need for new concepts on services and entrepreneurship).

9. The possibilities on remote and other flexible terms of work should be observed as integral parts on one hand to the realistic operational precondition of companies, on the other to the institutional shortcomings in different sectors. Also in this case it is essential to identify potential and necessary service tasks keeping in mind the objective to create new jobs through new occupations.

10. One should pay special attention to ”the hidden areas” on employing in such a way that companies would get flexibly and ”right on time” the manpower they are in need for. This requires, however, new innovations which should be connected to supportive labour political measures and incentives when needed.
CHAPTER 6.

Development Recommendations of the Evaluation and Further Thoughts

Summary: Social Innovativeness as a Challenge
GENDER MAINSTREAMING EQUALITY IN THE FINNISH ESF-INTERVENTIONS
A Summary of the thematic evaluation of the ESF-frame of reference from the gender perspective

Helsinki University of Technology/The Centre of Urban and Regional Studies
Liisa Horelli
Janne Roininen
Sirkku Wallin

University of Oulu/The Research and Development Centre of Kajaani
Pentti Malinen
Heikki Keränen
Sanna Nousiainen

January 2003
1. **INTRODUCTION**

Equal opportunities is one of the factors ensuring the relevance and effectiveness of Structural Fund Operations. Therefore, the comprehensiveness and coherence of the information provided on the promotion of equality are important criteria in assessing the quality of Structural Fund Interventions. Although systematic programming of equality as part of programme-based structural policy is quite new in Finland, it has been given an important status. Equal opportunities is the only one of the five horizontal themes of the Finnish ESF-frame of reference that has a double position; it is both a horizontal theme and a strategic focus. The frame of reference presumes that equality between the sexes will be mainstreamed into all parts of all ESF-programmes.

The Ministry of Labour arranged a competition for the thematic evaluations of the horizontal themes of the ESF-frame of reference, in Spring 2001. The Research and Development Centre of Kajaani at the University of Oulu and the Centre of Urban and Regional Studies at the Helsinki University of Technology established a consortium for the evaluation task on the quality of gender mainstreaming ESF activities the plan of which was reworked, according to the request of the Ministry of Labour, in Autumn 2001. The personnel of the Research and Development Center of Kajaani, Pentti Malinen, Heikki Keränen, Marjatta Pikkarainen and Sanna Nousiainen, has been in charge of the administration of the evaluation and of the chapter dealing with the evaluation of the ESF-projects. Liisa Horelli, Janne Roininen and Sirkku Wallin from the Centre of Urban and Regional Studies have created the framework and methodology for the evaluation and written all the other chapters of the final report.

The main questions of this thematic evaluation are:
- How well has gender equality been mainstreamed in all ESF-activities, and on all levels?
- How well have the programmes and projects enhanced the most significant areas of activities from the gender perspective?
- How has the application of the ESF-frame of reference contributed to the vision, created during the construction of the ESF – framework, which is called “The European Finland of knowledge, employment, competence, entrepreneurship, and equality”?

The task and aim of the thematic evaluation are to present the results from answering the main questions, to draw conclusions and to make corresponding recommendations for the improvement of ESF-activities.
2. THE FRAMEWORK AND METHODOLOGY OF THE EVALUATION

The integrative framework of this evaluation comprises concepts from gender studies, gendered urban and regional studies as well as gendered concepts of evaluation.

The General Regulation on the Structural Funds for the period 2000-2006 contains new features on the integration of equal opportunities for women and men, such as the legal obligation of "gender mainstreaming". Mainstreaming equality in urban planning and development, also within structural fund interventions, can be defined as the application of a set of gender sensitive visions, concepts, strategies, implementation and monitoring in the different phases and arenas of the development and evaluation cycle (cf. Horelli, 1997; European Commission, 2000). It also involves the complementary design, implementation, monitoring and evaluation of specific measures and operations to promote equality and to assist women and in some contexts also men in order to participate and benefit equally. This is called the application of positive action.

The global objectives for equal opportunities at the level of a Community Support Framework, Single programming Document or Operational Programme should specify, according to the European Commission instructions (2002), the areas (preferably with quantified targets) in which improvements are to be achieved. The most significant areas, where improvement from the gender perspective should be achieved are:

- access to all levels of labour markets,
- education and training,
- enterprise creation and growth,
- reconciliation of work and family life, and
- balanced participation in decision-making.

In addition to the five areas, another category, namely the improvement of self-esteem and coping skills seem to be most significant.

In order to ensure that the measures in the programmes as well as the projects contribute to the chosen areas, it is important to classify the measures and the projects to the following categories: equality-positive (positive action to women or men, depending on the context), equality-oriented or gender-sensitive (general operations or projects which will clearly contribute to the gender-equality objectives), and equality neutral (general operations or projects which will not contribute to any of the equality objectives).
For the purpose of interpreting the results, we have created an idealised model of fair structural policy from the gender perspective. It contains gender-sensitive priorities and measures that target the varying levels of holistic economy (Figure 1; Henderson, 1996; Horelli & Roininen, 1999).

Figure 1. An idealized model of fair structural policy, in which the gender-sensitive priorities and measures contribute to the varying levels of holistic economy (Horelli & Roininen 1999).

The design, methods and data of the evaluation

The design of the evaluation was carried out according to a three-level model consisting of 1) the project level, 2) the programme level and 3) the ESF-frame of reference (cf. Figure 2). This design allowed to pose questions to all the levels. The logic of the evaluation meant in practice that first the “black box” of the programmes was content analysed in terms of their structure, content, targeting and beneficiaries. Then the analysis focused on the projects as a whole as well as on a few case studies. Finally, the ESF-frame of reference was analysed on the basis of all the other data.

The multi-level evaluation comprised data from all of the levels: planning documents, internet-assisted surveys, interviews with the project managers and beneficiaries, and the data banks of the authorities. The main methods of evaluation were the content analysis of the programmes, including the so called equality filter (Horelli & Roininen 1998), the analysis of the ESF project register and surveys (Figure 3).
Summary: Gender Mainstreaming Equality in the Finnish ESF-Interventions

Figure 2. The three level design of the evaluation.

Figure 3. The data and methods of the evaluation, according to the different levels (indicators from 1555 ESF-projects and the gender classification of 2406 ESF-projects).
3. RESULTS OF THE EVALUATION

The results will be reported according to the principle questions in terms of the three levels.

How has the promotion of gender equality been “programmed” into the programmes?

Equality has been programmed fairly well to the programmes although the programmes differ by nature and profile from one another. The mainstreaming of the different parts of the programmes also varies. For example, the monitoring system is (technically) the most successful, whereas the contextual analysis and the partnership during the programming are the least successful ones from the gender perspective (cf. Table 1).

Seven of the ESF-supported measures in the programmes are equality or gender-positive, 15 are equality-oriented and 10 are equality-neutral. The highest amount of gender-sensitive (both equality-positive and equality-oriented) measures can be found in the Equal-community support framework and in the Objective 3 programme. The most relevant “instruments” of structural policy from the gender perspective are both Objective 1-programmes. Objective 2 programme of West-Finland, Equal and Objective 3 are fairly relevant. The Objective 2 programme of Southern Finland has flaws which reduce its relevance (cf. Table 2).

The objectives and the corresponding measures in the programmes are incompatible, except for the Objective 1 North and Objective 3 programmes. The objectives are large in the Objective 1 East, Objective 2 West and Objective 3 programmes but their measures are, except for the Objective 3, focus only on one or two areas of action. The programmes contribute mostly to activities in the areas of labour markets (22% of the whole ESF funding) and education and training (20% of the ESF-funding), least to enterprise creation and growth.

The profiles of the programmes differ from one another. Objective 1 East is an instrument that can be characterized as focusing on the labour markets and benefits the unemployed and socially excluded. Objective 1 North strives to support enterprises and entrepreneurs. Objective 2 South contributes to the areas of labour markets, education and training as well as participation. The beneficiaries are mostly the personnel of organizations. Objective 3 targets both the areas of education and training as well as the reconciliation of work and family-life. The beneficiaries come from a great variety of categories. Thus the beneficiaries of the programmes cover a large scale of women and men, beginning from the unemployed and excluded to the personnel of organizations, and even municipalities themselves (Table 2).
### Table 1. A matrix of the results of the structural analysis of the programmes from the gender perspective.

<table>
<thead>
<tr>
<th>PROGRAMMES (only ESF-funded measures)</th>
<th>PROGRAMME PARTS UNDER ANALYSIS</th>
<th>TOTAL OF THE SCORE OF THE PROGRAMME Max. 100 p.</th>
<th>LEVEL OF MAINSTREAMING OF THE PROGRAMME</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Contextual analysis of the programme Max. 20 p.</td>
<td>Objectives and strategies of the programme Max. 20 p.</td>
<td>Priorities and measures of the programme (including the allocation of funding) Max. 30 p+ (10)</td>
<td>Monitoring and evaluation system of the programme Max. 10 p.</td>
</tr>
<tr>
<td>Objective 3 programme</td>
<td>6</td>
<td>17,5</td>
<td>24 (10)</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equal</td>
<td>12</td>
<td>7</td>
<td>22 (2)</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Objective 1 East</td>
<td>7,5</td>
<td>15</td>
<td>33 (8)</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Objective 1 North</td>
<td>11</td>
<td>13,5</td>
<td>24 (3)</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Objective 2 South</td>
<td>9,5</td>
<td>11,5</td>
<td>18 (2)</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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<thead>
<tr>
<th>PROGRAMMES (only ESF-funded measures)</th>
<th>PROGRAMME PARTS UNDER ANALYSIS</th>
<th>TOTAL OF THE SCORE OF THE PROGRAMME Max. 100 p.</th>
<th>LEVEL OF MAINSTREAMING OF THE PROGRAMME</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective 2 West</td>
<td>7</td>
<td>16.5</td>
<td>31 (3)</td>
<td>10</td>
</tr>
<tr>
<td>MEAN</td>
<td>8.8</td>
<td>13.5</td>
<td>25.3</td>
<td>8.2</td>
</tr>
<tr>
<td>TOTAL SCORE OF THE PARTS</td>
<td>53 / 120</td>
<td>81 / 120</td>
<td>152 / 240</td>
<td>49 / 60</td>
</tr>
</tbody>
</table>
Table 1. A matrix of the results of the structural analysis of the programmes from the gender perspective.

<table>
<thead>
<tr>
<th>PROGRAMMES (only ESF-funded measures)</th>
<th>PROGRAMME PARTS UNDER ANALYSIS</th>
<th>TOTAL OF THE SCORE OF THE PROGRAMME</th>
<th>LEVEL OF MAINSTREAMING OF THE PROGRAMME</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Contextual analysis of the programme Max 20 p.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Objectives and strategies of the programme Max 20 p.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Priorities and measures of the programme (including the allocation of funding) Max 30 p+(10)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Monitoring and evaluation system of the programme Max 10 p.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Partnership during the programming Max 10 p.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>LEVEL OF MAINSTREAMING OF THE PART</strong></td>
<td><strong>1 44 % of the max. points</strong></td>
<td><strong>2 67,5 % of the max. points</strong></td>
<td><strong>3 81,7 % of the max. points</strong></td>
<td><strong>1 30 % of the max. points</strong></td>
</tr>
<tr>
<td><strong>COMMENTS</strong></td>
<td>EQUAL and NORTH 1 are good but the others are fairly weak in this part of the programme.</td>
<td>Successful in all others except in EQUAL.</td>
<td>A great variance between the programmes. EAST 1 is the best and the weakest is SOUTH 2.</td>
<td>The most successful part of the programme: WEST 2 is the best, but all the others are also adequate.</td>
</tr>
</tbody>
</table>

**LEVELS OF MAINSTREAMING THE PROGRAMMES:**
1. degree of mainstreaming means that equality has been recognized in only one or two parts of the programme.
2. degree of mainstreaming means that equality has been recognized in several parts but not in the whole programme.
3. degree of mainstreaming means that equality has been recognized in most or all parts.

**LEVELS OF MAINSTREAMING THE PROGRAMME PARTS**
1. degree of mainstreaming means that equality has been recognized in this part only in one or two programmes.
2. degree of mainstreaming means that equality has been recognized in this part in several programmes.
3. degree of mainstreaming means that equality has been recognized in this part in most or all programmes.
CHAPTER 3.

Results of the Evaluation

Summary: Gender Mainstreaming Equality in the Finnish ESF-Interventions

How have the projects enhanced equality in the structural fund interventions?

According to the ESRA-register, one thousand gender-sensitive (equality positive and equality-oriented) projects have emerged. This is about 40% of all ESF-projects. Nearly 20% of all the projects are equality positive, but they are mostly targeted to women. Only 1% of all the projects are targeted to men. A majority of the gender-sensitive projects, both in absolute and relative terms, have been produced by the Objective 3-programme. The least amount of gender-sensitive projects have been produced by the Objective 2 West programme. The majority of the projects contribute to the areas of labour markets and education and training. Only 20% of the projects contribute to Enterprise creation and growth.

Only 20% of the ESF-projects have chosen equality objectives (a fourth of the projects have none what so ever). The equality objectives of women respondents deal with the increase of self-esteem and coping, social networking and the improvement of the level of education. Men’s objectives also deal with the improvement of the level of education and the increase of self-esteem and coping.

Women and men have participated on equal terms in the ESF-projects. Nevertheless, women have founded fewer enterprises (44%) and new jobs (41%), and maintained fewer old jobs (39%) than men. The outcomes of gender-sensitive projects are mainly qualitative. The results can be characterized as psycho-social skills, interaction and networking-competences. This was evidenced both by the

Table 2. Profiles of the ESF-supported programmes.

<table>
<thead>
<tr>
<th>PROGRAMMES</th>
<th>LEVEL OF MAINSTREAMING</th>
<th>SCOPE OF OBJECTIVES</th>
<th>FOCUS OF MEASURES / TARGETED AREAS</th>
<th>BENEFICIARIES</th>
<th>RELEVANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>EAST I</td>
<td>3</td>
<td>Wide</td>
<td>Focused, labour orientated</td>
<td>Unemployed, socially excluded, young people, students</td>
<td>+</td>
</tr>
<tr>
<td>NORTH I</td>
<td>2</td>
<td>Narrow</td>
<td>Focused, labour orientated</td>
<td>Enterprises, entrepreneurs, the personnel of enterprises</td>
<td>+</td>
</tr>
<tr>
<td>SOUTH 2</td>
<td>2</td>
<td>Narrow</td>
<td>Fairly wide, labour, training, education and participation orientated</td>
<td>The personnel of organizations, unemployed</td>
<td>-</td>
</tr>
<tr>
<td>WEST 2</td>
<td>3</td>
<td>Fairly wide</td>
<td>Focused, training and education orientated</td>
<td>Organizations, local residents, private persons</td>
<td>+ -</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>Wide</td>
<td>Fairly wide, training, education, work and family oriented</td>
<td>Enterprises, different groups of people</td>
<td>+ -</td>
</tr>
<tr>
<td>EQUAL</td>
<td>1</td>
<td>Fairly wide</td>
<td>Fairly wide, participation, training and education orientated</td>
<td>Elderly, adolescents, women, immigrants, ethnic minorities</td>
<td>+ -</td>
</tr>
</tbody>
</table>
project leaders and the ESF-authorities. The difference between the gender-sensitive and gender-neutral projects lies in the fact that the former seem to recognize better women’s needs and interests in their interventions. However, there are only few projects that have tapped the interests of men.

The gender-sensitive projects have had impacts that are associated with participation and coping skills. The results dealing with coping correspond well to the objectives set in the projects. However, the measuring and demonstration of this kind of qualitative results is a problem as no adequate indicators exist.

The gender-sensitive projects have met many constraints part of which is connected with the qualitative nature of the results. The project leaders have not received adequate advice and support for the project planning from the administrative bodies. The latter is reflected in the scarcity of equality objectives. The qualitative nature of the gender-sensitive projects has also constrained the monitoring of the projects. The current indicator-system is not able to tap the qualitative results of the gender-sensitive projects.

Also the system of payment for the gender-sensitive projects turned out to be problematic. Small projects and especially the projects dealing with the third sector, are often led by women. If the payments are late, the small projects cannot cope with the financial obligations as they cannot compensate the delay of the payment with their own money.

In spite of the difficulties, one best practice-example was found in which the constraints had been surpassed by applying creative means. “Karelli as a model for the world” strives to construct new models of action and modes of networking and meshworking, which might serve as a model even for other projects.

**How has the ESF-frame of reference steered the mainstreaming of structural fund policy?**

The evaluation of the regional implementation of the horizontal theme of equality discloses that Eastern and Northern Finland have mainstreamed better the structural fund interventions than Southern and Western Finland (Figure 4). This conclusion is drawn only on the basis of the analysis of the Objective 1 and 2 programmes. At this stage, it is impossible to draw any regional conclusions on the basis of the analysis of the projects, because the statistics in the ESRA –register are not up to date.

The double position of equality in the ESF-frame of reference has not had a significant impact on the implementation of equality. Equality has remained subjugated by the other horizontal themes, those of information society, partnership and anticipation. The latter have a stronger position than equality.
Nevertheless, equality has been “programmed” into the programmes varyingly, but fairly well in general (cf. Table 1). The Objective 1 programmes are most relevant in terms of equality. The Objective 2 West, Objective 3 and Equal are a bit less relevant. The least relevant from the gender perspective is Objective 2 South (cf. Table 2).

Figure 4. The summary of the evaluation results: the double position of equality in the ESF-frame of reference, comparision of the implementation of mainstreaming regionally and thematically, assessment of the programmes as “gendered instruments of structural policy”, the production of gender-sensitive projects, and the contribution of the projects to the significant areas of activities from the gender perspective (* the projects of Equal have just started).

The strongest steering effect in the three-level, programme-based strategy seems to be between the programmes and the projects. The programmes whose gender-relevance is strong, seem to produce more gender-sensitive projects (cf. Table 3). The Objective 3 programme is an exception, since due to its huge resources, it has produced 56% of all the gender-sensitive projects. The absolute amount of funding has an impact on the quantity of gender-sensitive projects. However, the overall production of projects has not functioned well enough,
since the 70% of funding allocated to gender-sensitive measures in the programmes has only produced an amount of gender-sensitive projects that is 40% of all the ESF-projects.

The gender-sensitive projects have, so far, contributed mostly to the areas of labour markets, education and training; least to enterprises and economic growth, participation, and the reconciliation of work and family-life. The latter outcomes are not adequate enough from the perspective of the Interface-model of the ESF-frame of reference. Nor have the projects been relevant enough from the perspective of changing the trend from short-term and part-time contracts into more stable working relationships.

The normative insufficiencies, found in the evaluation, are associated with the weak implementation of the Interface-model of the ESF-frame of reference and the scant steering potential of the double position of equality. The strategic deficiencies are due to the too general nature of the objectives and the conflicts between the gendered objectives and the measures (the existence of objectives without measures and vice versa). The operational weaknesses are the consequence of the administrative system, which is not able to steer and manage equality-oriented projects with predominately qualitative outcomes.
4. CONCLUSIONS AND RECOMMENDATIONS

The following conclusions can be drawn and recommendations made concerning the gender mainstreaming of the ESF –activities, including the steering effect of the ESF-frame of reference in the structural fund interventions in Finland:

**Conclusion 1:** The ESF-financed development is an important possibility for both women and men, but the gender mainstreaming of the structural policy is still incomplete. There are normative, strategic and operational weaknesses in the implementation of the horizontal theme of equality.

The double position of equal opportunities is a significant symbol that legitimizes the promotion of equal opportunities in the structural policy. However, gender equality has not yet been systematically mainstreamed in all ESF-activities, nor on all levels. Equality has been programmed into the programmes fairly well. On the other hand, the turning of the measures into projects has not succeeded well enough.

**Recommendation 1:** The gender relevance of the ESF-frame of reference should be increased by defining and targeting the equality objectives more precisely, both in the ESF-frame of reference and in the programmes. The incompatibilities between the objectives and measures should be abolished. The programmes have objectives without measures and measures without objectives.

**Conclusion 2:** The ESF-activities have enabled women and men to participate in the structural fund interventions, but women’s outcomes have been quantitatively fewer than those produced by men. From the women’s point of view, the gendered measures and projects are too narrowly targeted mainly to labour markets and the education and training. Entrepreneurship, participation and the reconciliation of work and family have received too little recognition. The outcomes of the gender-sensitive projects are mainly qualitative. They bring forth psycho-social skills, the know-how of interaction and networking. The difference between the gender-friendly and gender-neutral projects lies in the fact that the former seem to take seriously the needs and interests of women. However, there are very few equality-positive projects that would recognize the interests of men (only 1 % of the ESF-projects).

**Recommendation 2:** More attention should be paid, in the selection of projects, to the targeting of them also to areas, such as the reconciliation of work and family and participation, including the development of the infrastructure for every day
Summary: Gender Mainstreaming Equality in the Finnish ESF-Interventions

life. More support is also needed to female entrepreneurship, especially in the field of innovative technology. Also the number of equality-positive projects for men should be increased.

Conclusion 3: The ESF-activities and the national labour policy share a similar orientation from the gender perspective, but the added value of the ESF-activities is contradictory. On the one hand, the ESF-financed measures, which target the desegregation of labour markets and the gender-sensitive training projects, support well the corresponding efforts of the National Action Plan of Employment (NAP). On the other hand, the added value has remained low, because the gender-sensitive measures of both instruments target the same areas: the labour markets and the education and training. Adequate resources have not been targeted to the surfaces, called “The innovative development of work” and “The new models of employment”, which are part of the model in the ESF-frame of reference.

Recommendation 3: “The responsible organizations of labour”, which is also part of the ESF-interface-model, should be reinforced through the selection of projects, so that the gender-sensitive measures would contribute to the reconciliation of work and family-life. In addition, women should be encouraged to participate more in “the innovative development of work” and “the new models of employment”. This would increase the added value of the ESF-activities.

Conclusion 4: The administration and the payment-system of the ESF does not function in an adequate way, especially for small projects.

Recommendation 4: It might be worth while experimenting with a double system in which the smaller projects could have a lighter and faster system of administration. The administration of larger projects could remain the same as their risks are greater.

Conclusion 5: The monitoring system of the structural fund interventions does not function adequately from the gender perspective.

Recommendation 5: The improvement of a gendered monitoring system seems to require the following tasks:
a. The conditions, objectives and target areas of structural fund interventions should be made visible, for example through modelling (cf. Figure 1), so that groups participating in the development work could understand what issues should be monitored. The evaluation brought forth the significance of gendered areas, besides the labour market and the education and the entrepreneurship, also the reconciliation of work and family-life, and the participation in decision mak-
CHAPTER 4. Conclusions and Recommendations

Summary: Gender Mainstreaming Equality in the Finnish ESF-Interventions

b. Besides the hard quantitative indicators, such as new jobs and enterprises, qualitative indicators that assess the extent and improvement of social and cultural issues, should be created. Even the gradual progress, in terms of new networks and resources centers, should be recognized; these kind of weak signals of development might pave the way for the next step of progress (cf. the Appendix 1).

c. The current classification of the gender-sensitive projects should be corrected. The recently improved classification-system in the ESRA –register does not distinguish adequately the equality-positive projects from the equality-orientated ones. An equality- or gender-oriented project should be defined as one whose main objective is not necessarily the promotion of equality, but which, however, recognizes the differences and interests of women and men. Most projects should be gender-sensitive. In addition, approximately 20 % of all projects should be equality-positive, either targeted to women or men, depending on the context.

d. The ESF-register should be more reliable and much more swiftly updated. Unreliable statistics diminish the trustworthiness of the evaluation.

Conclusion 6: The lack of mainstreaming know-how on all levels of the ESF-activities constrains the structural development work from the gender perspective.

Recommendation 6: The dissemination of mainstreaming know-how in structural policy requires that the authorities, responsible for the structural fund interventions, both in the central and regional administrations, should be trained first. Thus, they could steer and co-ordinate gender-sensitive structural policy and advice, what gender equality is and how it can provide additional value in complex situations. Equality consultants, who are experts both in gender mainstreaming and in structural fund interventions, could be hired as trainers. They could be paid from the funds belonging to the technical assistance of the programmes.

Conclusion 7: Compared to the earlier phases of structural fund interventions, both gender mainstreaming and the application of positive action as part of the ESF-frame of reference, have taken several steps forward. Thus, the application of the ESF-frame of reference in structural fund interventions from the gender perspective has contributed conspicuously to the national vision of “A European Finland of knowledge, employment, competence, entrepreneurship, and equality”.

Recommendation 7: Gender mainstreaming structural policy should, however, be systematically continued.
A tentative opening of the concepts and issues around diverse economies
(Horelli, 2002)

<table>
<thead>
<tr>
<th>MECHANISMS OF ECONOMIC EXCHANGE AND COORDINATION</th>
<th>REMUNERATION OF LABOUR</th>
<th>ORGANISATIONAL FORM</th>
<th>ASSETS &amp; RESOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Open) market</td>
<td>Wages</td>
<td>Capitalist (enterprises and jobs)</td>
<td>Monetary resources: profits from selling. Organisational resources: physical, human, social, structural, and digitalised capital.</td>
</tr>
<tr>
<td>Publicly or State Administered market</td>
<td>Wages for public and semi-public service employees, and the third sector actors</td>
<td>Public administration or enterprises (office and commissions at local, national and international public administrations)</td>
<td>Monetary resources: direct and indirect taxes; transfers between administrations; selling of services for the market. Org. resources as above:</td>
</tr>
<tr>
<td>Alternative market</td>
<td>Wages and additional income for the third sector employees (NGOs, associations, co-op labour). Alternative paid (alternative currencies,indentured, in kind, etc.)</td>
<td>Ecologically and socially responsible organisations; co-operatives, mutuals, associations, resource centres, non-profit organisations (self-employment) and the varying states of the network.</td>
<td>Monetary resources: Donations, public subventions. Organisational resources: Physical, human, social, structural, and digitalised capital.</td>
</tr>
<tr>
<td>Non-market (Barter, household flows, gifts, indigenous exchange)</td>
<td>Unpaid (Volunteer, housework, family care)</td>
<td>Non-capitalist: Households and families, communities (self-employment)</td>
<td>Ecological, human and social capital (popular know-how, natural resources, etc.)</td>
</tr>
</tbody>
</table>
Summary: Gender Mainstreaming Equality in the Finnish ESF-Interventions
SUSTAINABLE DEVELOPMENT AS A HORIZONTAL THEME
Evaluation of the sustainable development as a theme of the ESF frame of reference
Summary of the Final Report

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Timo Tohmo

November 2002
The main objectives of the European Social Fund are developing human resources and promoting employment. The strategic emphases and horizontal themes are defined in the ESF-frame of reference (figure 1). The frame of reference guides the measures in all programmes supported by the Fund, including regional objective 1 and 2 –programmes as well as objective 3 and the Equal-programme. Horizontal emphasis should be taken into account in the planning and implementation of the programmes. Thus the horizontal themes are carried out with mainstreaming principle in all ESF programme work. The horizontal emphases in the ESF-frame of reference are: 1) information society, 2) equality, 3) local partnership, 4) sustainable development and 5) anticipation.

According to the regulation of the European parliament and council (EC, N:o 1262/1999) the task of ESF is to support measures that aim at preventing unemployment, developing human resources, and social integration into the work market. Besides promoting employment, the objective of ESF is to promote sustainable development, among other things. The subject of this evaluation is sustainable development as a horizontal theme in Finnish structural funds programmes. The goal is to find out how sustainable development manifests itself and is put into specific terms in EU-programmes and ESF funded projects.
In this current evaluation sustainable development is considered an entity that includes, besides the traditional sustainable development concerning natural environment, also economical and social viewpoints. The point of view follows Finnish government’s sustainable development-programme, whose the basic outlines aim at ecological sustainability and creating economical as well as social and cultural conditions that support ecological sustainability. The evaluation consists of both quantitative and qualitative research of the projects. Due to the nature of sustainable development as a horizontal theme, the evaluation is mainly qualitative, and thus the focus is on the manifestation of the theme.

1.1 Defining sustainable development

Sustainable development in the ESF-frame of reference

All the measures that are funded by the European Social Fund are directed by the ESF-frame of reference. The frame of reference defines sustainable development as a theme that is implemented with integration principle. Basically the principle of sustainable development is thought to concern only natural environment, but the concept has become wider and covers also economical and social aspects. In the ESF-frame of reference the theme of sustainable development is defined the following way:

“The principle of sustainable development basically concerns natural environment, but the concept has become wider and covers aspects of economical and social fields. This is partly due to acquiring an understanding of human life and the dependency between human life, as well as and work and natural environment. On the other hand, it has been understood that it is necessary to take into account also ethical principles, as well as respect for nature, in all economical and social activity. Utilising environmental factors is an important positive possibility in the maintaining employment, trade and regional politics, as well as maintaining the quality of life.”

Applying the principles of sustainable development, maintaining biological diversity, innovative and sustainable use of natural environment in business and enterprise life, developing environmental technology, and research, development and training that focuses on this specific field which has a positive impact on employment. Management of the environment has also a value in itself, and a part of the factors that make up the quality of living environment. Therefore ESF programme work is expected to create possibilities for implementing these principles as concrete action. Sustainable development is an important horizontal emphasis in ecological as well as social sense.

Measures that are based on promoting the protection of environment, repairing damage on the environment and restoring natural state, maintaining biodiversity or developing environmental technologies, ecological enterprises or busi-
CHAPTER 1.

Summary: Sustainable Development as a Horizontal theme

nesses are also supported by ESF. The measures should be aimed also at environmental education training and R&D programmes. Through these measures the programme promotes employment and supports regional development.

In this evaluation the definition of sustainable development is based on the programme of sustainable development approved by the Finnish government (1998) that follows the guidelines of the Brundtland commission. According to the world commission of environment and development (the so-called Brundtland-commission, 1987) “sustainable development is development that satisfies the needs of today without endangering the possibility of future generations to satisfy their needs”. The objective is that people would learn to live in harmony with each other and their natural environment, thus implementing the principle of sustainable development.

The main objective of Finnish governments sustainable development -programme is ecological sustainability. Objectives are also set for economical, social and cultural prerequisites that support ecological sustainability. Thus sustainable development is defined, in its basic objectives, through ecological sustainability, but there are sociocultural and economical aspects that support this objective. The government’s sustainable development -programme follows also Agenda 21 of the UN environmental and development congress (Rio de Janeiro), according to which sustainable development means that economical and social development are fitted into the framework defined by natural resources in such a way that nature and possibilities for human development will be preserved for future generations.

The three dimensions of sustainable development are defined mainly through the measures and objectives on macro-level, using as examples the slowing down of changes in climate (ecological sustainability) and economical growth that is balanced in quality (economical sustainability), promoting the well-being of population by paying special attention to employment, preventing social displacement and the quality of life of elderly people (social sustainability), and nourishing cultural diversity (cultural sustainability). The following provides a brief description of the contents of the different dimensions of sustainable development.

Ecological sustainability. The objective is to preserve biological diversity and the functioning of the ecosystems, as well as, in the long run, adjusting the populations economical and material actions to match the capacity of the environment. This objective means, for example, slowing down the change in climate by reducing emission and changing consumption and production methods that area a strain on the environment. One objective is sustainable use of natural resources, which requires ecological and effective use of non-renewable natural resources, as well as increase the use of renewable resources.

Economical sustainability. The objective is growth that is balanced in quality and contents, that is not based on long-term incurring of debts or draining reserves. Preventing changes in climate requires, among other things, developing
the energy effectiveness of production processes. Products and services have to be produced with less strain on the environment, and at the same time saving energy and natural resources.

Competence and technology are important factors. Sustainable economical development is ever more clearly based on investing in human capital, i.e. education, as well as research and development. The focus is on developing environmental technologies, in order to meet with, for example, the requirements set by the growing environmental consciousness of the market.

Figure 2. Different dimensions of sustainable development.

Social sustainability. Sustainable development is much concerned with the citizens’ well-being and its distribution. Economical and other social development has a remarkable impact on improving the citizens’ well-being. Socially sustainable development is connected to social problems and finding solutions to them. Social dimension may also appear in the experiences of health, safety, social relationships and comfortability. Thus socially sustainable development takes on the point of view of the individual, as its effects can be seen in different groups of people or different phases of life. On the level of the individual, an important question is, how is it possible to succeed in creating requisites for control of life, personal responsibility, as well as aspiring to and learning about sustainable ways of life. Upbringing, education and possibilities for participation are important in this context. The effects are based on experience, and thus it is hard to measure them.

Socially sustainable development can also be looked at from a social point of view. One of the greatest social challenges in Finland is unemployment, and social displacement and the growth of social differences that is mainly caused by unemployment. Increasing internal migration has caused social problems in regions with both positive and negative internal migration. A social effect can also be an effect on living, services, economics and land use. These effects can be measured.
**Cultural sustainability.** Culturally sustainable development pays attention to the possibilities and limitations of the cultural environment. For example, the vitality of the different fields of Finnish art is remarkable. In areas with negative internal migration problems have occurred to which solutions can be searched for also in the regional cultural characteristics. This means preserving folklore, cultural landscape and historically valuable buildings and living environments. The identity and vitality of minority cultures is also important to culturally sustainable development.

In this evaluation it is also taken into account that the programme of the Finnish government aims especially at strengthening ecological sustainability. Sustainable development does include three dimensions, but the socio-cultural and economical aspects are seen as factors supporting ecological sustainability (figure 2). In the evaluation this means that in looking at the socio-cultural and economical dimensions the programmes should be linked to the ecological dimension, or at least they must not be any conflict between them.

### 1.2 Contents of the evaluation of sustainable development as a theme and evaluative questions

The objective of this evaluation was to find out how the horizontal theme of sustainable development has been taken into account during period 2000-2006 in the guidelines for ESF programme work and in the implemented projects. The evaluation covers ESF funded interventions in objective 1, 2 and 3, as well as in the Equal-programme. In the evaluation attention is paid also to how the measures support the EU and Finnish national employment programmes through sustainable development.

The objective of the evaluation was to create a practical picture of the implementation of the theme of sustainable development. The ultimate goal is to form conclusions of the success and results of the theme in ESF programme work. In addition to this an attempt will be made to draw up concrete recommendations for developing the programmes. In the following are some examples of good practices from the point of view of sustainable development. This evaluation attempts to provide answers to the following questions, which follow the assignment of evaluation:

1. Has the projects improved the possibilities of the realising party or target group to implement in their own actions sustainable development, to improve the quality of their environment (e.g. air pollution, noise, waste management, living conditions, traffic safety etc.) or to participate in making decisions about them?
2. To what extent has the projects had an effect on reducing the use of natural resources, or increasing the effectiveness of their use?
3. To what extent have the projects been able to put create networks for the realising parties, that is, to decrease traffic or make it more effective and increase information transfer, or to have an impact on the development and usage of environmentally friendly products and services?

In addition to the evaluative questions set in the assignment, the following additional questions that are directly connected to the social, economical and cultural dimensions were drawn up. The additional questions were drawn up because the content of the original questions was too restricted what comes to social and economical dimensions.

4. How does the program work support the implementation of social and economical sustainable development?
5. How does the program work support the implementation of the ecological sustainable development?

1.3 Implementation of the evaluation

A special feature of a thematic evaluation is that emphasis is put on the analysis of integration principle. Sustainable development as a horizontal theme should be taken into account using a mainstreaming principle in programme strategies, implementation and project planning, as well as in the interventions implemented through the projects (figure 3). This principle is the basis of this evaluation. Evaluation of sustainable development concentrates on the manifestation of the contents of the theme in the programmes and projects. Based on the manifestation of the theme it is possible to estimate also how the different contents of the theme will be manifested in the results of the programmes and projects in the future.

Important concepts in evaluating sustainable development are ‘environmental impact’ and ‘sustainable development’. In this evaluation environmental impact is defined as all factors with direct impact on natural environment. Correspondingly, sustainable development is seen as a wider concept, and it includes three dimensions; economical, socio-cultural and ecological dimension. The ecological dimension of sustainable development corresponds in content to the aforementioned concept ‘environmental impact or environmental viewpoint’.

Contents of the final report of the evaluation. The basis of the evaluation is on looking at the strategic level, implementation and project planning, and implementation of the projects. The analysis of the strategic level is based on programme documents. The analysis of implementation and project planning utilises results from interviews with programme co-ordinators as well as information from programme documents. The analysis of the manifestation of the theme in the implementation of the projects based on the results of an inquiry to the realis-
Figure 3. Starting points of a thematic evaluation.

Figure 4. Evaluation process

Summary: Sustainable Development as a Horizontal theme
ing party and on case studies. The objective of the analysis of the strategic level and implementation is to provide a picture of the internal and external coherence of ESF programme work, and their success from the point of view of sustainable development. A synthesis of different points of view forms a projection of the potential results of the theme and its effects on the projects.
2. SUMMARY OF THE RESULTS OF THE EVALUATION

2.1 Sustainable development in the ESF-frame of reference

Sustainable development is included in the ESF frame of reference as a horizontal theme that should run through all programmes as a so-called integration principle; in other words, from the planning to the evaluating the implementation of the programmes. The theme of sustainable development in the ESF-frame of reference is built on the recursive nature of the economical, social and ecological dimensions (figure 5). In promoting sustainable development attention must be paid to the fact that the socio-economical operating environment creates the basis also for promoting actions that concern natural environment. Therefore, the different dimensions of sustainable development must be seen as an entities that support each other, and which, in the long run, each are a precondition for the successful realisation of the others. Socially and economically sustainable development effect the realisation of ecologically sustainable development, which in turn advances the realisation of the other two dimensions.

Figure 5. Sustainable development as a recursive process of three mutually supportive dimensions
Sustainable development in the ESF-frame of reference can be seen as a target-oriented theme, and its aim is the advance the realisation of sustainable development. The objective of the Social Fund is to develop human resources and advance employment, through which the programmes integrate into developing education and competence. This in turn restricts the actual including of the ecological dimension into the implemented projects. Therefore it is characteristic for ESF programme work that development as a concept includes not only measures directly aimed at natural environment but also those that include the socio-cultural and economical dimensions.

2.2 Sustainable development in ESF programme work and implemented projects

The main results of evaluation are summarized in table 1. Following the mainstreaming principle of horizontal themes, the evaluation results are presented from strategic level to implementation of projects.

Table 1. Main results of evaluation

<table>
<thead>
<tr>
<th>STRATEGIC LEVEL: Analysis of the ESF-frame of reference and programme analyses</th>
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<tbody>
<tr>
<td>Sources of information</td>
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<tr>
<td>Programme documents, ESF-regulation and Finnish government platform of sustainable development</td>
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<tr>
<th>PROGRAMME WORK: Analysis of implementation and development and acceptance of projects</th>
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<td>Co-ordinator interviews (15).</td>
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</table>
CHAPTER 2.

Summary of the Results of the Evaluation

Summary: Sustainable Development as a Horizontal theme

Data in the project register (project applications, sample of 500 projects).

- Manifestation of sustainable development in the accepted projects applications (selection criteria).
- *The picture of the environmental effects of the projects, produced by ESRA—monitoring system, is not reliable due to insufficient instructions. The accentuation of projects in the environmentally neutral category can be considered normal, considering the contents of ESF-project operations.
- *The economical and social dimensions of sustainable development were not taken into account as a selection criteria in the follow-up databases.
- *Based on the “tight” categorisation, which in turn is based on the basic definitions of the sustainable development programme of the government, the theme of sustainable development was not well presented in project applications.
- *Based on the criteria mentioned above, the social dimension of sustainable development is the most emphasised in project planning, as is characteristic for ESF-operations.

Internet inquiry to projects leaders

- Paying attention to the theme of sustainable development in project planning and implementation.
- *The results of the internet-inquiry showed that evaluation of the integration of the theme on project level is difficult.
- *The internet-inquiry showed that the socio-cultural and economical dimensions of sustainable development were the most emphasised in the projects.
- *Contents of the ecological dimensions in the analysed projects were mainly preserving natural resources, recycling, wider utilisation of renewable resources, effecting the energy consumption habits and promoting environmental consciousness and changing attitudes.
- *Contents of the economical dimensions in the projects were mainly developing competence, developing processes of enterprises, promoting research and development and promoting voluntary direction methods.
- *The contents of the social dimension were related mainly to employment and prevention of social displacement (e.g. supporting social networks, promoting career and life control, workshops, training of the unemployed, developing work environments).

Case-studies

- Realisation of sustainable development in project process and best practices.
- *The realisation of the theme in the projects is strongly related to the basic setting of objectives for the projects. Projects that are based on the problematics of sustainable development offer the best conditions for successful realisation of the theme in the project process.
- *Case-studies show that the following can be considered good practices for the realisation of the theme: integrating of the theme in other actions of the implementor, and conscious unifying of the three dimensions of sustainable development in the same projects.
- *Considering the conditions for ESF-operations, the innovative and endogenous simultaneous integration of the projects into the social and ecological dimensions can be considered an excellent approach for the realisation of the theme.

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The social dimension of sustainable development is an integral part of all programmes realised in Finland (Objective 1, 2 and 3 programmes and Equal-programme). The ecological objectives that manifest themselves in the programmes concern also social and economical objectives, but on the other hand also directly concern natural environment and preserving it.

Figure 6 shows the estimations of the implementing parties of the project of the extent to which different dimensions of sustainable development are included in the projects. According to the estimation, socio-cultural dimension is included in 75 % of the measures. Economical dimensions is included in 57 % of the measures, and ecological dimension in 28 %. Social dimensions has been emphasised over the other dimensions in the implementation of the projects.

Figure 6. Inclusion of different dimensions of sustainable development in the projects.

Considering the nature of ESF programme work it is not surprising that the emphasis is on the social dimension. Although there are little measures that directly concern with natural environment, it is important to notice the integration of social and economical dimensions into the ecological dimension. They also create a basis for ecologically sustainable development. This way the emphasis of the projects is on influencing basic structure of sustainable development.

The actual environmental impact is often closely related to investments, and therefore they are emphasised among the projects of the European Regional Development Fund (ERDF). It is important for structural fund interventions and promoting sustainable development to look at the entity from the points of view of socially, economically and ecologically sustainable development. An integral question is what kind of a picture is created of the structural funds interventions,
and what is the role of ERDF and ESF in enhancing sustainable development. From the point of view of the Finnish government’s sustainable development programme, the emphasis in ESF is on advancing employment and preventing social displacement (social dimension), and correspondingly in ERDF on creating a stable growth that is balanced in content and quality to preserve prerequisites of life for future generations (economical dimension).

Figure 7 shows in a nutshell how ESF-programmes are linked with different dimensions of sustainable development. The table illustrates the role of ESF-programmes in the so-called circle of sustainable development.

Figure 7. ESF programme work in the circle of sustainable development (cf. Bucher & Kocks, 2001)

ESF programme work is largely integrated into the social dimension of sustainable development. Because of this the wideness of the theme is considered problematic, because it is not considered to add any extra-value to the objectives of the ESF interventions. However, developing and testing new, innovative practices is an integral part of ESF programme work. This in its part emphasises the importance of the theme in relation to national objectives and measures.

In ESF funded interventions socially sustainable development mainly relates to projects that aim at advancing employment, preventing social displacement, preserving culture and enhancing knowledge, and developing work environment and social networks. Correspondingly, ecological dimension manifests itself in advancing possibilities for remote work and forestry, and promoting environmental consciousness and recycling. Economically sustainable development is linked
to ESF programme work in, among other things, promoting voluntary guidance methods (production and products), developing environmental certificates for enterprises, supporting research and development activities, and raising of competence capital.

2.3 The theme of sustainable development and national employment strategy

The plan of operations of the National Employment Plan (NAP) for the year 2002 is based on the common employment strategy of the European Union. The regulation of the European parliament and European Council (EC, N:o 1262/1999) states that the objective of the European Social Fund is to support measures that aim at preventing unemployment, developing human resources and social integration into the labour market. The Fund’s objective is, as well as advancing employment, to promote sustainable development.

The objectives of sustainable development are not clearly stated in the plan of operations if Finnish employment plan (NAP), other than stating that, based on the policy decision of the government, utilising opportunities created by the possibility for remote work will be developed in order to promote the objectives of environmental politics. However, sustainable development manifests itself in the plan in many ways. For example, the objectives of the plan of operations – such as preventing long-term unemployment, preventing youth unemployment, making public services more effective, supporting entrepreneurial activity of special groups, supporting social entrepreneurship, developing labour legislation, developing good practices for work communities and promoting equality of different generations - are closely connected to the social dimension of sustainable development. Thus, because of the emphasis on social dimension, it can be said that ESF programme work supports Finnish national labour politics.

It is hard to put into specific terms the focuses on economical and ecological dimensions of sustainable development in the national employment strategy. The concept of sustainable development as presented in the ESF-frame of reference is clearly more diverse and brings additional value to projects. As a whole sustainable development has been more clearly manifested in the ESF-frame of reference and different programmes.
2.4 Evaluative questions and recommendations for promoting sustainable development in ESF programme work

Have the projects improved the possibilities of the implementing parties or target groups to realise sustainable development through their own actions, to improve their living environment (e.g. air pollution, noise, waste disposal etc.) or to participate in decision making when these are concerned?

Citizen society and activities related to it, and the possibility to participate are realised in the projects mainly by utilising information networks. This is considered to improve the citizens’ participation in e.g. discussion on municipal planning, and through this also their impact on it. However, this has not been an integral question in the projects.

In different inhabitant- and activating projects carried out in small villages in the countryside and suburbs, activity and participation have been closely connected with developing one’s own living environment and advancing comfortability. These projects also include preventing social problems caused by unemployment and social displacement.

Recommendation for measures

1. More emphasis should be put on the implementing parties’ and target groups’ possibilities to realise sustainable development in their actions. This could be advanced by influencing the structures of a citizen society through education, instruction and advancing the understanding of sustainable development.

To what extent have the projects had an effect on decreasing the use of natural resources, or improving the efficiency of their use?

Part of the projects have resulted in decreasing the use of natural resources and making their utilisation more efficient by developing new technologies. In relation to the required total investments, however, these projects only create and develop prerequisites. The effectiveness of the projects depends largely in how actively enterprises are involved in the actual implementation phase. The projects also include developing enterprises’ environmental management systems and related training and consulting.

In practice part of the projects have had an effect on decreasing the use of natural resources on a small scale through, for example, different kinds of workshops and recycling centres. This kind of activity includes, besides ecological dimension, also employment of people in a weak position on the labour market. In its most diverse form sustainable development is manifested in, for example, workshop projects.
Recommendation for measures

1. Integrating operations that aim at employment and decreasing the use of natural resources into one group of projects should be encouraged. This creates possibilities for operations that take into account future potential for employment and obligations related to the international ecological dimension.

To what extent have the projects been able to promote using telecommunication networks in their activities, that is, to decrease the amount of traffic and make it more efficient, and increase the transport of information, or effect the development of more environmentally friendly products and services?

Information networks and utilising them manifest themselves in the contents of the projects. Along with them especially distance learning and possibility for remote work are integral contents of the projects. The starting points of the projects are mainly educational, and they create possibilities to access the “information highway”. Thus regional equality is much emphasised in the projects. However, in the projects networks have not been created for financial activities, at least to such extent that through a clear increase in remote work they would have any concrete effect on the amount of traffic.

Developing environmentally friendly products and services in the participating enterprises is closely connected to the environmental certificates drawn up in them, and energy saving projects. In recycling there has been a clear increase in preparing for the handling and recycling electronic waste.

Recommendation for measures

1. Developing competence capital conforming to the ESF-frame of reference creates new possibilities for developing diverse solutions in environmentally friendly products and services. Based on the recursivity of employment and education, e.g. remote work offers a starting point for utilising information networks. It is essential to the realisation of the aforementioned developmental points of view that the enterprise sector is more involved in the implementation of projects. New, more dynamic practices of development and acceptance of projects are needed to integrate the enterprise sector into the implementation of projects.

Additional questions
In addition to the evaluative questions above, the following additional questions directly related to the social, economical and ecological dimensions of sustainable development were set. The additional questions were necessary because the contents of the questions given in the assignment was considered inadequate in what comes to the social and economical dimensions of sustainable development.
How does the program work support the realisation of socially and economically sustainable development?

Strategic level. The social dimension of sustainable development was emphasised in different programmes. In practice this was seen in the measures taken to advance employment, to prevent social displacement, and to develop work life. Correspondingly, the economical dimension of sustainable development manifested itself in, for example, development of environmental certificates for enterprises, acknowledging the production capacity and diversity of nature, and an increase in renewable sources of energy and efficient use of energy. The economical and social dimensions of sustainable development were most clearly manifested in Objective 1 programme in Eastern Finland and Objective 2 programme in Southern Finland. In these programmes the ecological targets were implicitly connected to economical and social targets, and thus they also follow the Finnish government’s programme of sustainable development.

Execution of programmes and development and acceptance of projects. From the point of view of implementation it was considered rational to expand the theme of sustainable development from natural environment to cover also social and economical dimensions. Related only to natural environment, sustainable development is too narrowly defined for the point of view of ESF programme work as well as the characteristics of several different fields of administration. However, the guidelines given for sustainable development were considered too open to various interpretations and not tight enough. From the point of view of implementation, only ecological field was defined clearly enough, whereas for socio-cultural and economical fields the contents of the theme were not considered concrete enough, and for their part the theme had remained on a too abstract a level.

Another problem in the implementation was that the theme had not been entered into in enough detail. In the application phase of the projects, the ecological dimension of sustainable development is emphasised, because it is the easiest to perceive. This is clearly demonstrated by the fact that although the economical and social dimensions are included in the objectives and implementation of the projects, the applicants do not necessarily recognise it. The results showed that the implementing parties found the contents of sustainable development difficult to understand. In practice, only aspects connected to natural environment are emphasised in the applications for projects, and even these aspects often are only a compulsory “green finish”.

Implementation of projects. The inquiry to implementing parties revealed that it is difficult in separate projects to perceive the relationship of measures taken and objectives set to the concept of sustainable development, and to give con-
crete examples of the viewpoint of the theme. This supports the picture received in the implementation, that the contents of the theme in planning and implementation had not been understood.

Based on the inquiry and project analysis, the socio-cultural dimension was more pronounced in the projects. This was much explained by the characteristics of ESF-projects and the nature of ESF -frame of reference, which is closely connected to socially sustainable development. Issues related to work, work life and employment are central contents of the projects. In practice this was manifested in advancing the employment of people in weak position on the labour market through education and supportive actions, as well as improving coping at work. From the point of view of socially sustainable development, especially preventing social displacement and encouraging control if life was integrally manifested in the implemented projects.

Information networks and utilising them was a remarkable entity linked to sustainable development. By promoting them, the goal was set to improving possibilities for distance learning and remote work. Especially in remote areas their impact can be seen to be mainly social, enhancing regional equality. In decreasing the amount of traffic or making it more efficient, those two factors can not be expected to have any remarkable impact on the amount of traffic.

The economical dimension of sustainable development mainly manifested itself in the projects aiming at developing entrepreneurial activity. The economical dimension was manifested mainly in a search for possibilities to utilise new technologies in enterprises, and to apply them. It was also manifested in the projects were promoting regional natural products, certification of forests, and developing the quality- and environmental systems of enterprises. In addition to these the projects were linked to the ecological dimension of sustainable development through different processes of the enterprises – production, information and flow of goods/products, and energy processes. This kind of projects were implemented, according to the evaluation, in industrial enterprises as well as service enterprises, e.g. tourism and restaurants. Otherwise the theme was included in the projects only as a general principle, and in practice it is hard to perceive what it concretely included.

**Recommendation for measures**

1. It is important to choose the emphasis of the theme in the programme work: is the emphasis on the environmental point of view (natural environment) or more generally on sustainable development (ecological dimension as well as socio-cultural and economical dimensions)? The theme should be put into specific terms in such a way that the contents of sustainable development would become clearer for both the authorities deciding on financing and the implementing parties of the projects. From the point of view of the objectives of the Social Fund, the wider definition of sustainable development is more relevant.
2. In ESF-programme works especially the social dimension of sustainable development needs sharper objectives. In practice this is a prerequisite for taking the theme into account would have additional value in the programmes. New openings for producing additional value require opening up the theme from within: social sustainable development should be connected more closely to economical and ecological dimensions.

3. At the moment the contents of the theme are unorganised, and clear only when pertaining to natural environment. For the follow-up the instructions should be detailed and concrete, which would make it possible to form opinions of the manifestation of the different dimensions of sustainable development in the projects. General preliminary guidelines of the theme should be provided, which would include in the measures aimed at natural environment also the social and economical dimensions of sustainable development. Thus the theme would become more transparent and it would be more easily included in the projects.

4. “Marketing” sustainable development also for the implementing parties and interest groups is one possible course of action in advancing the understanding and recognising theme. It is also an absolute prerequisite for the successful inclusion of the theme in the projects.

How does the programme work support the realisation of ecological sustainable development?

Strategic level. The ecological dimension of sustainable development manifested itself in the programmes in the form of production capacity of nature, diversity, and renewable sources of energy. As well as in advancing environmental competence and consciousness and attempting to reduce the strain in the environment. The ecological objectives of the programmes are also linked to socially and economically sustainable development, and through this they also support the programme of sustainable development of the Finnish government.

Execution of programmes and development and acceptance of projects. Out of the concepts of sustainable development as seen through the frame of reference, the ecological dimension was considered the easiest to comprehend. This is partly due to the fact that in the application phase the aspects of sustainable development dealing with natural environment were emphasised, and they most often seem far-fetched or merely a “green finish” aimed at pleasing the financing parties. The problem, considering the characteristics of ESF programme work and implementation, is the lack of entering in detail into the theme.

The realisation of the environmental viewpoint is monitored by an evaluation of each project of environmental impact by authorities, the guidelines of which is emphasised on natural environment. Most of the projects are classified environmentally
neutral, because they are not directly targeted at the environment. Because of this the transparency is not sufficient. The guidelines for ESRA-monitoring system emphasises natural environment, and all the authorities have not had sufficient guidelines.

According to the ESRA-monitoring system, 25% of the projects were environmentally positive. According to the registered material, including environmental point of view in other education, paying attention to environmental issues in enterprises and promoting environmental consciousness have been the central contents in the classified projects.

According to the ESF-co-ordinators there are two points of view to the manifestation and taking into account of the theme. Part of them considered the theme to manifest itself very well in the implementation of the projects, but there was also a considerable number of differing opinions. Based on the results, it seems that the difference depended on how concretely the theme is required to manifest itself in the projects before they are classified environmentally positive. This in its part reflects the lack of general guidance.

**Implementation of the projects.** Part of the projects that were qualified environmentally positive in the ESRA-monitoring system stated in the inquiry that the project did not have any environmental impact. This supports also the fact that in the application phase the environmental aspects of the projects are emphasised, and are often merely an attempt to give the project a “green finish”. In practice, ecologically relevant contents in the implementation of the projects were for example saving of natural resources, implementation of recycling, more extensive utilisation of renewable natural resources, energy consuming habits and changing attitudes in general away from throwaway culture.

In the projects where the ecological dimension manifested itself concretely in the objectives and measures taken, it most often was related to promoting socially sustainable development. For example, in projects targeted on individuals, in these projects as a clearly separate group were those projects that were related to employment, in which the ecological dimension was emphasised usually as recycling (e.g. workshops).

Correspondingly, in the projects that aimed at developing enterprises and their activity, the ecological dimension was largely connected to economically sustainable development. This appeared mainly in drawing up and developing environmental and quality systems, planning and realisation of recycling as theme in the projects. Another things that became evident in the projects the improvement of the product’s lifespan from the source of raw materials through production, processing and disposal after use (waste disposal site, recycling, energy source, materials recovery etc.). Also the increase in the amount of electronic waste and the actions required by it, as well as promoting ecological production were well presented in the projects.
Recommendation for measures

1. The objectives of sustainable development (if the projects include them) should be included in projects in such a way that they would by the actual objectives, rather than a compulsory “green finish”. The theme should be included as such in for example educational projects. This is especially relevant in the field of ecological and economical projects. Excessive quantitative goals may give motivation to give a “green finish” to the projects in the application stage.

2. The ESF-projects mainly concern socially sustainable development. The holistic realisation of the theme, however, requires enriching it, and opening up and diversifying the possibilities created /offered by it. In practice, the best practices are found in projects which involve different dimensions of sustainable development (e.g. recycling workshops, environmental systems of enterprises). One potential target group for promoting socially, economically and ecologically sustainable development is offered by social enterprises in the recycling field.
3. CONCLUSION

The narrow definition of sustainable development as action that is targeted at natural environment does not meet with the ESF-projects very well. The theme is included in the projects in, for example, environmental education, counselling and research, as well as preserving cultural heritage. However, ESF-projects do not include, for example, any planning or traffic projects that would be significant to physical environment, or projects that repair environmental damage.

It is appropriate, from the point of view of ESF-projects, to give a definition — as the framework does — of sustainable development that is as broad as possible, so that it includes also socio-cultural and economical dimensions. Broadly defined, sustainable development is linked also to affluent society, in which just actions are taken to ensure the citizens equal opportunities to create their own well-being and obtain basic prerequisites of life, as well as possibility for equal social participation. Despite the expectations set for affluent society, the realisation of sustainable development is also the responsibility of each citizen, and it requires a wide co-operation of different parties.

The definition of sustainable development is complex, which makes it difficult to measure its emphases in programmes and projects. It is not relevant to measure the manifestation of the theme in projects with ‘yes/no’-questions because of their heterogenic nature of the projects. Mainstreaming sustainable development and realisation of integration principle in the projects requires more accurate and concrete definition: different realising groups should have common terms for taking into account and the follow-up of the theme.

The additional value of the horizontal theme of sustainable development is based mainly on two areas. The projects realised through ESF give an opportunity to develop and test new, innovative practices and approaches, also from the point of view other dimensions related to sustainable development. On the other hand, relevantly defined (ESF’s focus on the social dimension), it is possible for the theme to produce additional value to the programmes through emphasising sustainable development. The objective of securing continuation of the projects started and continuing revision of guidelines of development is implicitly included in the idea of sustainable development.
CHAPTER 3.

Conclusion

Summary: Sustainable Development as a Horizontal theme
LOCAL PARTNERSHIP THEME
Evaluation of ESF-Frame of Reference
Summary of the Final Report

Terttu Heino
Minna Örrainen

October 2002
1. INTRODUCTION

The evaluation of the theme of local partnership (as of all themes) consists of analysis of the theme, estimation of the execution of the theme, effectiveness estimation of the theme, estimation of common effects, estimation of justification of the theme, and over-all estimation of the theme. The previous progress report concentrated on the analysis of the theme and on the estimation of the execution of the theme. In this report all the estimation tasks are answered. However, effectiveness estimation remains defective for some programmes (mainly the EQUAL community initiative programme) because the projects are still taking their first steps. The effectiveness estimation is carried out as far as possible, though. In the over-all estimation of the theme, the versatile and concrete analysis of partnership models related to the theme is central. An attempt is made in this report also to give serviceable propositions for action and recommendations, which reach to the project level.

Furthermore, the original evaluation task has been extended by including the estimation of interaction between the European Social Fund and the execution of Finnish employment strategies. The theme of local partnership as a tool of employment care is emphasized and therefore it was natural to carry out the estimation of interaction of ESF and NAP in connection with the estimation of this theme.

To the estimation of the theme of local partnership four main questions have been posed:

1. What kinds of models of local partnership are implemented?
2. How do the models of the local partnership operate?
3. Are the models efficient in their operation for example in employing of long-term unemployed?
4. What are the obstacles to the local partnership?
Acquisition of information

For the estimation of the theme information has been gathered in several different ways. The project plans and the follow-up indicators of ESF projects (to the end of the year 2001) have been obtained from ESRA project register. In addition to this, the assessment data were collected directly from authorities and from project field with inquiries and interviews. The compilation of all the inquiries that have been carried out in the estimation is seen in Table 1.

Table 1. Surveys and interviews carried out in the evaluation of the local partnership.

<table>
<thead>
<tr>
<th>Method</th>
<th>Target group</th>
<th>Sample</th>
<th>Answers</th>
<th>N</th>
<th>%</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey via Internet</td>
<td>Project managers</td>
<td>1 416</td>
<td>948</td>
<td>66,95</td>
<td>December 2001 - January 2002</td>
<td></td>
</tr>
<tr>
<td>Survey, Equal–projects</td>
<td>Project managers</td>
<td>37</td>
<td>23</td>
<td>62,16</td>
<td>July 2002</td>
<td></td>
</tr>
<tr>
<td>Survey, Local Partnership</td>
<td>Project managers</td>
<td>32</td>
<td>13</td>
<td>43,75</td>
<td>July 2002</td>
<td></td>
</tr>
<tr>
<td>projects</td>
<td>ESF Coordinators of Employment and Development</td>
<td>83</td>
<td>41</td>
<td>49,40</td>
<td>June - July 2002</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Centres and of Provincial State Offices</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Survey, regional financers</td>
<td>Directors of Labour Market Departments, Employment</td>
<td>63</td>
<td>19</td>
<td>30,16</td>
<td>June - July 2002</td>
<td></td>
</tr>
<tr>
<td></td>
<td>and Economic Development Centres</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thematic interviews</td>
<td>Project managers</td>
<td>44</td>
<td>38</td>
<td>86,36</td>
<td>September 2002</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Partners Target groups</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Over-all estimation of the implementation of the local partnership

The general over-all estimation of the implementation of the theme of the local partnership could not have been given with one indicator (in the manner of other horizontal themes) because the theme has not had its own classification before. Only in the spring of 2002 an official classification was obtained. In the first progress report the implementation of the local partnership was estimated according to the criteria. It was stated that attention has equally been paid to different parties in the operation of projects and that bottom up -principle is fairly well carried out on the project field. Instead shortcomings have been found in planning and organising of the cooperation, in the meeting of the participants’ interests and needs and in the participants’ commitments. For the final report, special scores and classifications based on the realization of 11 different factors, were created for the implementation of local partnership. The total points of the imple-
Implementation of local partnership were calculated (the partnership points) for every project, and the projects were graded according to what extent they implement the local partnership. The 11 criteria given to the local partnership were:

1. Local partnership appears in objectives of a project
2. Different partners have participated in both planning stage and implementation stage of a project
3. The partners’ participation in a project has been sufficient
4. Empowerment has been sufficient
5. Bottom up –principle has come true
6. Project managers’ own estimates of implementation of the local partnership
7. A new way to operate has been created
8. Improving employment of the unemployed has been influenced with local partnership
9. Emergence of new companies has been influenced with local partnership
10. Grass-root level has had its voice heard better with local partnership
11. Local initiative has increased by local partnership

Every criterion got points in the projects as follows; 1 point = the criterion has been implemented extremely well/extremely significantly, 0,5 points = the criterion has been implemented to some extent and 0 points = the criterion has not been implemented in the project at all. Thus one project may have got 11 partnership points in its maximum.

According to the partnership points the local partnership is implemented averagely in the projects. The average partnership points on the projects were 5,9 points, only three projects has had 10,5 points (the best ones) and nearly half of the projects got points between 5 and 6,5 (table 2). Only 3,7 % of all the projects (18 projects) was executing local partnership nearly perfectly (at least nine points). Local partnership is considered to be implemented better than averagely when partnership points reach at least seven. Approximately every third one of the projects was of that kind. Most of the projects implementing local partnership well were financed from the objective 1 programme of Northern Finland and from the objective 2 programme of Southern Finland. In both programmes there were about 40% of the projects, which had received at least seven points (table 2). The projects of EQUAL community initiative programme have got the weakest partnership points: their result is not real because during the time of the estimation they have been so at the initial stage that it has not been possible to estimate statistically the implementation of the partnership for all the criteria. The main
evaluation of EQUAL projects takes place on the basis of the interview material. On the whole the local partnership is implemented fairly similarly in each objective, it is not dependent on the programme.

Table 2. Points of local partnership received by the projects according to the objective programme.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Total points of local partnership</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0 – 2.5 p.</td>
</tr>
<tr>
<td>Objective 1 – programme of Eastern Finland (N=96)</td>
<td>1.0</td>
</tr>
<tr>
<td>Objective 1 – programme of Northern Finland (N=57)</td>
<td>1.8</td>
</tr>
<tr>
<td>Objective 2 – programme of Western Finland (N=43)</td>
<td>2.3</td>
</tr>
<tr>
<td>Objective 2 – programme of Southern Finland (N=41)</td>
<td>-</td>
</tr>
<tr>
<td>Objective 3 programme (N=245)</td>
<td>3.7</td>
</tr>
<tr>
<td>Equal (N=10)</td>
<td>10.0</td>
</tr>
<tr>
<td>Total (N=492)</td>
<td>13.0</td>
</tr>
</tbody>
</table>

According to the province implementation of the partnership was evaluated only for those projects, which had got seven or more partnership points. On the basis of this examination there were clear regional differences (Figure 1) how partnership was implemented. Projects, which had implemented partnership well existed mostly in Varsinais-Suomi, in Ostrobothnia and in Central Ostrobothnia. In each area there were at least half of the province’s projects with at least seven partnership points. In the county of Western Finland and in Lapland over a third of the projects implemented local partnership well. In the county of Eastern Finland, in Päijät-Häme and in Itä-Uusimaa instead there were least of those projects, which had implemented local partnership successfully.

From table 3 it is seen the implementation of the criteria of partnership forming the basis for over-all estimation. Evaluators had estimated relatively weak the manifesting of the theme in objectives of projects as well as different partners’ participation in separate project stages, which together weaken the average of partnership points in the projects. Both criteria were fairly weakly implemented in the projects. The estimation of the implementation of the criteria 3-11 is based on the project managers’ own estimations and they get much more positive results. The reliability of project managers’ own answers cannot be suspected, however, because as experts of local fields, they are also the best to estimate them. Empowerment and adequacy of different actors’ participation are implemented best according to the project managers’ own estimations. Another positive result is that in nearly all the chosen projects a new local way to operate has been created and at least to some extent the local initiative has increased.
Figure 1. Shares of the projects implementing local partnership excellently (partnership points 7 or more) in regard to all the projects of the province.
Interaction of ESF and Finnish employment strategy

In connection with the theme estimation supplementary roles and mutual interaction of the European Social Fund and execution of Finnish employment strategies (NAP) were also studied from the point of view of the persons in leading position in the Labour market Departments of TE-Centres. The significance of the local partnership in relation with the plan of action of the regional employment policy was also examined.

Except for Finland’s two provinces the European Social Fund has had an effect on forming the plan of action of regional employment. The regional stresses of ESF have been taken into consideration when making objective plans and the ESF operation’s long-term policy have been utilised into the compilation of annual regional objectives. The EU measures have been fixedly integrated to regional labour market policy and already in the planning stage decisions on the division of labour have been made between ESF and national financing according to the separate measures and target groups. Even in those areas in which ESF has not had a direct effect on the action plan

Summary: Local Partnership theme

Table 3. Implementation of partnership criteria in the projects.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Excellent implementation (1 point)</th>
<th>Implementation to a certain extent (0.5 points)</th>
<th>No implementation (0 points)</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Local partnership appears in objectives of a project</td>
<td>56</td>
<td>125</td>
<td>300</td>
<td>481</td>
</tr>
<tr>
<td></td>
<td>11.6</td>
<td>26.0</td>
<td>62.4</td>
<td>100</td>
</tr>
</tbody>
</table>
| 2. Different partners have participated at both planning stage and implementa
tion stage of a project                                                  | 28                                 | 75                                            | 385                         | 488|
|                                                                          | 5.7                                | 15.4                                          | 78.9                        | 100|
| 3. The partners’ participation in a project has been sufficient          | 211                                | 204                                           | 17                          | 432|
|                                                                          | 48.8                               | 47.2                                          | 3.9                         | 100|
| 4. All the participants have been empowered                               | 239                                | 141                                           | 17                          | 397|
|                                                                          | 60.2                               | 35.5                                          | 4.3                         | 100|
| 5. Bottom up–principle has come true                                     | 168                                | 234                                           | 10                          | 412|
|                                                                          | 40.8                               | 56.8                                          | 2.4                         | 100|
| 6. Project managers’ own estimates of implementation of the local partnership | 311                                | 160                                           | 3                           | 474|
|                                                                          | 65.6                               | 33.8                                          | 0.6                         | 100|
| 7. A new way to operate has been created                                 | 293                                | 157                                           | 4                           | 454|
|                                                                          | 64.5                               | 34.6                                          | 0.9                         | 100|
| 8. Improving employment of the unemployed has been influenced with local partnership | 187                                | 200                                           | 53                          | 440|
|                                                                          | 42.5                               | 45.5                                          | 12.0                        | 100|
| 9. Emergence of new companies has been influenced with local partnership  | 74                                 | 232                                           | 119                         | 425|
|                                                                          | 17.4                               | 54.6                                          | 28.0                        | 100|
| 10. Grass-root level has had its voice heard better with local partnership | 155                                | 259                                           | 33                          | 447|
|                                                                          | 34.7                               | 57.9                                          | 7.4                         | 100|
| 11. The local initiative has increased by local partnership               | 204                                | 257                                           | 6                           | 467|
|                                                                          | 43.7                               | 55.0                                          | 1.3                         | 100|
it is seen as a tool which optimises the over-all resources and with which the projects supporting NAP are executed. So the interaction functions in both directions, NAP serves for its part as a frame of reference in the estimation and execution of projects and the most central projects executing and supporting the employment action plans are ESF projects, in addition to the fact that ESF has been taken into account in compiling regional action plans (RAP).

In three provinces a separate RAP has not been made but a national NAP is used as a foundation and a guideline for operations. In spite of not having a separate plan an attempt has been made in those areas also to regionalize the national plan of action at a practical level. TE-Centres try to affect, among others, the fact that attention would be paid to the contents of NAP in regional development plans. Furthermore, propositions coming from different areas, special questions and regional focuses are taken into consideration next to NAP in a regional employment policy. There have been three provinces taking part in pilot areas of NAP to which the compilation of the regional plan of action was connected. The regional plans of action of employment have been drawn up with cooperation of several partners: at its largest there have been separate departments and consultative committees of TE-Centre, unions of provinces, provinces’ cooperation groups, provincial governments, the labour market organisations and entrepreneur organisations, municipalities, educational institutions, local labour offices and directing ministries. At its smallest there have been at least labour offices of the area in addition to the TE-Centre. In some areas the drawing up of the employment strategy is financed by a project in which case there has been better opportunities to get more and more local actors along, eg. the third sector. One can state that the regional plans of action have been quite comprehensively drawn up according to the tripartite principle based on what national employment policy plan requires (the plan of action of Finnish employment policy 2002).

In addition to the fact that the local actors have participated in compilation of the regional action plans attention has been paid to locality and to local needs in plans of action through different channels. TE-Centres have drawn up analyses of functional areas, discussed with local actors, included regional initiatives in programmes, consulted the ESF coordinators and utilised the feedback received during the regional tours.

The interaction of ESF and employment strategies reaches up to the project level, too. The regional action plans of employment also direct the ESF coordinators’ work in all the provinces. However, the coordinator’s own knowledge and experiences of everyday work of labour administration affect the concrete adapting of plans.
The theme of local partnership is seen as an extremely necessary definition of policy, which is even necessary in executing the plan of action of regional employment policy. With the help of partnership an attempt is made to make the employment care as the matter of not only labour administration. Networking, wide regional cooperation, commitment and agreeing are not crucial merely with the actions of ESF, but necessary also within the sphere of national measures. The partnership proves to be difficult to concretise as a concept. Even though the partnership pierces the employment policy principles in emphasising and favouring of the cooperation of many actors, the estimation of its usefulness is difficult. Most of the provinces have experiences of the partnership projects in the previous programme period and local partnership is already well established as a way of action in those areas. However, local differences are also seen inside the provinces how partnership and its significance are experienced.
2. EFFECTIVENESS ESTIMATION OF THE THEME

Partnership models

As the point of view and starting point of the introduction of local partnership models the strategic focuses of the ESF frame of reference have been chosen and an attempt has been made to find the most typical models with which each focus is carried out. In connection with the introduction of models also concrete good practices are brought up, threatening factors preventing the models to be implemented are deliberated over and the effectiveness of models is brought out in so far as it will be possible while the projects still are mainly running. Culturally bound factors connected to the models, have been omitted from them so they can be adapted to all the areas. The differences between objective programmes are not emphasised in the introduction of models because they are executed around the country irrespective of the objective programmes. One example of partnership models implementing each strategic focus has been collected in this summary.

Partnership model related to the promotion of employment

Job path model

The Job path model is a partnership model which functions by the tripartite principle (public, private and third sectors) to cut long-term unemployment and to prevent marginalizing (Figure 2). The starting point is making a comprehensive survey of customer needs and on the other hand breaking down of the overlapping functions of different service bidders and building cooperation according to the definitions of target groups and of services. Along the path all the service bidders either alone or together participate in the measures to be offered according to the participants’ needs. The objective is primarily the customer’s employment to open labour market, which for its part is supported by an intensive participation of companies as well taking part in planning education as offering jobs. The companies themselves are given initiating education in connection with the path. This way the attitudes can be changed to diminish prejudices and to add the equality of the long-term unemployed. The third sector is strongly activated in the model and it has found its justifiable place during the intermediate stage before employment to the open labour market. Possibilities of the third sector to employ otherwise than with measures of support are minor but it creates possibilities to practise the rules of working life and to strengthen vocational work experience adding the customer’s competence within the open labour market.
Along the path different education solutions are offered. Basic periods are always organized by the same trainer so that more long-range plans and development can be made. Later educations are competed according to normal competition rules. The customer is directed to education suitable to him or her. The modules are built together with the trainer. In this way the contents of the education and its suitability to the target group can be influenced. The unsuitability of the education to the target group has especially been the problem of the labour market training. In some projects an agreement has been made with which the trainer commits himself to develop contents and methods suitable to the target group. To be able to do that the project is responsible for giving all the information the trainer needs.
CHAPTER 2. Effectiveness Estimation of the Theme

Summary: Local Partnership theme

The role of the authorities is emphasised on the first stage of the path. The Social Insurance Institution of Finland and the social care services participate in planning and creating the paths, and the labour administration participates also in executing different stages of the path. The associations of the unemployed are playing a significant role as messengers telling their members about the operation of the project. Problems may arise in catching the target group in which case the grapevine is the best way to approach.

The strength of the model is an increase especially in empowerment of the grass-root level and in implementation of the bottom up -principle. The target groups thank the fact that they have been allowed to be involved and that their wishes have been taken into consideration. Furthermore, actions of the authorities have been intensified with the model. Overlapping work has been cut and permanent structural changes have been achieved when people have noticed that it is possible to reduce everyone’s workload with cooperation.

No exact effectiveness information about the model is available but it is seen that after the path a numerous group has been employed to the open labour market and that the employing objectives have been exceeded already before the termination of projects. In addition to that, the target group’s over-all activity has increased. Eg persons unemployed for a very long time seek their way to further trainings. Also the spontaneous searching for work has increased. Instead the entrepreneurship is seldom a real alternative to the long-term unemployment. There are, however, those examples also.

In the model itself there does not seem to be bigger problems after it has been built and it is in operation. At the first stage it is crashed into service bidders’ mutual competition and into fear of losing jobs especially in the public sector. The participation of different and new partners also sets challenges for understanding, combining and approving of different organisational cultures and ways of action. Integrating of different operation cultures takes time and therefore projects have sometimes had to slow down executing the measures. Time is a significant factor both in public and private sectors, when one wants to affect the established attitudes or ways of action. Often the measures cannot be as rectilinear as quantitative and chronological objectives set for the projects would require.

The model is quite efficient to this target group, in particular because support and tools are provided along the path in order to get a long-term solution without forgetting the own voice of the target group. So the model is very customer-oriented. However, beside the target group oriented approach the idea of the strategic focus about utilising of the demand for labour has also to be kept in mind. The companies have come along after different offerings of attractions - usually with money. However, the best spur is the need of labour and the genuine commitment to the project and employing of the unemployed is more probable, if the
employer experiences that he or she is getting a skilled staff through the measures of the project. The third sector should not be emphasised as a long time employer because, often dependent on different support forms, its most natural role during the intermediate stage is as a trainer to the open labour market. One can generally state that all the local labour market partners have found their own place along the path and everybody has their own possibilities to influence on the project measures.

**Partnership model aiming to promotion of equality and of similar opportunities in the working life**

**Cooperation model of services for children and young**

The target group of the cooperation model of services for children and young is not the final service users but public, private, and third sector, which are offering services (Figure 3). With the help of the model it is attempted to get a permanent cooperation organization, which offers support and special services for children and adolescents and defines the regional focuses and subjects of development. The “nest” phase of the cooperation organization has been reached when the focuses of its services are seen in the budgets of municipalities. The model is executed with different focuses in three different areas in Finland.

The actual project organisation does not give any final solutions to the project groups but supports the partners in opening service processes and modelling them into a suitable form to the cooperation organization. The strategy has been an equal partnership and the different actors have been called along with tripartite principle. The starting point has been the fact that the public service bidders have experienced the service companies and the actors of third sector as only supplementing and an equal cooperation has not existed before. When resources have diminished, everyone’s participation has proved to be necessary, however. The project offers different innovative educational methods to be processed in groups of professionals from different branches. The methods have been efficient and good feedback has been obtained from them. The actors have got a wider point of view to their own work, they have learned to see their own positions and been able to divide their work at the same time promoting their own managing in the work. In some municipalities the “nest” phase has been achieved already.

Both constant self-assessment and consultative external estimation are an essential part of the model. Feedback is obtained from the beginning of the project, in which case corrective actions can be made, if necessary. Local universities, polytechnics and development centres related to the field are responsible for external estimation and collecting of the feedback. The end users utilising the results of the
Figure 3. Cooperation model of services for children and young.

model are more or less marginalized. An attempt is made to prevent marginalizing with the model by focusing the work at least to a part of the target group at an earlier stage. This way the resources of the society can be saved in the future.

The model is carried out in different areas and it has been noticed that organizing the cooperation takes place to some extent in different ways in different areas. In one area formal agreements are needed before operation, in other area finding of suitable persons is enough, in the third area you must make sure that all the parties will become impartially handled and nobody is able to benefit too much. Naturally, the models must be adapted according to the operation cultures of areas and the dominating values must be respected.

A few decades ago Finnish people have learned to trust the fact that the experts solve all the problems. They have learned out of the social and common responsibility. Increasing the communal social capital is one of the objectives of the model, for example by developing different operation models of peer support. In the model it is taught that every one should learn to take the responsibility for certain basic matters.
With the model it is not necessarily attempted to create new jobs but there has been rising forth a demand for establishing new companies in the areas. Need for example for the services of substitute institutional care and of family care is increasing. On the other hand, it is attempted with the model that the need for them would decrease but effects of this preventive work can be expected only after a longer time.

In the model actual obstacles cannot be seen. As a threat of some kind there can be essentially sectoral organization structures and clung organizational cultures in which case it can be difficult to build cooperation over the sector limits, however. Getting a sufficient state of will among the decision-makers of municipalities to reach the “nest” phase can also become a challenge. There are already signs however, of a wider interest towards the model. Thanks to the model, an interest for developing cooperation of welfare services has appeared besides the business and employment matters for example in development centres. Naturally, the openings of this kind are facilitating factors when approaching the decision-makers of the municipalities.

**Partnership model for improvement of quality and effectiveness of education, for promotion of vocational mobility and for strengthening relations of education and working life**

**Satellite model**

From the measures of strategic focus 3 rose forth the so-called satellite model. The basic idea of the model is dispersion of know-how from educational institutions to the surrounding area and strengthening the know-how of actors at the local level (Figure 4). The model includes both a wider regional aspect and local communities so that there is only one regional coordinator who operates at the same time in several smaller areas, such as in the municipalities and villages. As a head actor of the model and administrator in the projects was usually a polytechnic. Typical partners, central local actors and target groups were public sector, third sector, economic life, other companies and educational institutions in cooperation. In most projects, which carry out this partnership model, the concrete objective is strengthening of information technology readiness and professional know-how of different organizations and their staff and finding of different information technology solutions for the local actors. In the model the measures, which aim at the information society and at the information technology, are very strongly emphasised.

The model is based on a versatile know-how and operation of polytechnics and to a wide cooperation. In the background of polytechnics there has been and is an existing network of several different actors, which the polytechnics essentially utilise in their projects. In addition to universities this network contains other central actors, such as economic life, development companies and other projects. When designing projects, the polytechnics gather information from their net-
work about the focuses of development. The actual planning of projects is often performed between only a few actors of this existing network. As an exception to this pattern there are projects in which the local actors of the third sector are essentially participating in the planning of projects from their very beginning. This kind of a positive way of action became apparent especially in such education projects, which were directed to the villages and their companies and in which village associations had served as a central link between companies and the polytechnic and had partly created the project and its measures.
The starting point for planning the educations and measures of projects has been studying the needs of companies, local actors, municipalities and villages, staff, inhabitants, educational institutions and associations. The surveys of customer needs have been carried out often with inquiries but especially in the projects, which are related to the training of companies, company-specific group discussions have also been connected to them. Both staff of the company and supervisors have participated in the discussions. First of all the aim has been to find the joints of staff and supervisors and clarify the focuses of developing the company in detail and to find out the know-how needs of the future staff. When the target groups have been municipalities and educational institutions, the needs have been surveyed mainly in common meetings already during the planning stage of the project. Because of the existing and effective network of polytechnics the needs of the public sector, even the need for labour, has been much better recognized beforehand than the needs of the private sector.

Carrying out the actual operation of the model to the target groups starts only after the surveying of needs. Based on them the most suitable ways of action and training methods are designed to every local level. In connection with the planning process the exact definitions of policy are made of what educations and what kind of advice and individual guidance at a given time to different areas are offered and to what extent. Education is seen as a form of cooperation, which is tailored municipality-specifically and village-specifically. To each local level small groups are formed in which the target group’s increase in professional know-how and the development of welfare of work communities are followed all the time. This will help focusing the measures of each target group and area also between the training periods. An attempt is made to arrange educations at each local level separately, although some larger courses are concentratedly arranged in the polytechnics. Even though the educations are formed according to the needs of the local level, the courses are offered from the existing supply of polytechnics adapting their scope to suit to each area. No new educational programmes are invented within this model, but a new so-called “main coach model” has been created, though.

From a “main coach model” there is a couple of variations on the field, separate types with the same principle. The basic idea of the trainer model is that one trainer serves for each local level in a project and commits himself/herself to the project for the time of its operation and thus also to the needs of the target group. In a project these trainers have even been trained before going to the local level. As a precondition for the main trainer it is not that he himself or she herself keeps all the educations in the area but that he or she functions between a local target group and the polytechnic as a contact person and as a coordinator of educations.
Every local level has an own functional partnership network as a consequence of tailored municipality-specific and village-specific solutions created in the polytechnics. Both the authorities of different sectors of municipalities and the actors of the private side have begun to cooperate with each other in order to for example answer to an existing need for labour among different branches.

In addition to the cooperation, which takes place within the local level, the common educations and opportunities that have been arranged in the polytechnics have also started new cooperation between municipalities. With assistance of polytechnics different actors of the local level have drawn up even regional development plans for example to standardize services and information technology solutions. The polytechnics have offered their existing networks also to this developing work.

The special advantage of the model is that with its help several different local levels, companies and associations are brought together. The target group has often been willing to participate because of the fact that the polytechnic’s services have been totally free to them. A voluntary and active role of the third sector in progressing the projects was especially praised because the local associations were often only indirect beneficiaries in the measures of projects and they didn’t obtain any compensation for their voluntary work. So the will of local associations for the comprehensive developing of their area is extremely significant.

Nearly the only disadvantage of this partnership model is the fact that the model is carried out in the direction of the local level offering the municipalities and companies ready-made educational packages. The danger is that the cooperation in the direction of polytechnics stays on the level of surveys of customer needs only and the possibilities of influencing of the target group to the actual operation decrease. While offering ready-made courses the responsibility of developing the quality of education departing from the needs of the working life and building the new forms of education may also be easily forgotten by the polytechnics. In the interviews the biggest obstacle of the local level functioning was mentioned territorial thinking and lacking of earlier cooperation between separate actors. Sometimes the written agreements have had to be drawn up in order to make separate parties committed. They have facilitated the project’s practical actions, indeed. This partnership model does not have immediate employment effects but it is quite efficient in its focused operations.
Partnership model aiming at developing the know-how capital of companies and of working life and at reviving the working life

Demand model

The basic idea of the partnership in demand model is the interactive cooperation between companies and educational institutions (Figure 5) and answering the demand based on the working life. On the project field it had been noticed that there is more demand for the special experts than there exists supply at the moment on the labour market. The basic practice of the demand model was born from that fact; when a demand to the new know-how and need for the workers are found in the companies, the educational institutions will receive the challenge and train unemployed applicants to it. The contents of educations and of on-the-job training and the more exact measures are designed together with the companies. It is the responsibility of educational institutions to train new experts from unemployed persons to the presented need. The educations include theoretical periods and longer-term practical training during which the students carry out project assignments to the companies. The model operates especially well when the companies need the experts of a special field or quite new know-how for their companies, e.g. method experts, device experts and quality experts. The unemployed get a possibility to supplement their educational background or to study a new profession through the model. Demand model, however, does not necessarily guarantee the students’ employment but with the students’ help new extremely valuable know-how is exported to the companies during the practical training. The students also get new know-how, which gives them better possibilities to be employed to the open labour market. To some persons the model can also give the motivation to continue the studies.

In order to operate the model has to have an established and interactive partnership between educational institutions and working life. Often the educational institutions maintain this partnership through the consultative committees and company visits but on the other hand the partnership also requires active approaching of companies towards the educational institutions. In forming the partnership between students and companies on-the-job training periods are in key position. They have to be as long as possible lasting at least a year. Thus only the companies benefit from their new expert concretely both through the work made by him/her and through the new doctrine transmitted by him/her. A long practical training period also gives a student better possibilities to be employed. A second result risen from the project field was establishing new companies by the students encouraged with the new know-how. With the model clear quantitative employment effects and qualitative know-how capital effects are achieved which
indirectly improve the competitive ability and the turnover of companies. The model implements the bottom up principle excellently, the charges used for the education are in direct relation to the demand and the actors are relevant.

On the project field no obstacles were mentioned to the functionality of the cooperation of this demand oriented partnership model. If the partnership between working life and educational institutions is not in balance, bigger input and vigilance are required from the educational institutions in direction of the company life. Therefore educational institutions and working life have to develop functional interaction and informing ways constantly. Unfortunately any solutions did not rise forth in the interviews. Instead, there was a development proposition rising from the project field from the creation of the so-called future know-how bank. The know-how bank, which consists of different professional experts, is a clear new objective of partnership activity of the companies and educational institutions and a product of the future to secure the supply of the labour. With its help the trained workers’ quick availability is guaranteed to the hectic needs of the working life.
Influence and effectivity of the local partnership theme and partnership models

Effects related to employment, entrepreneurship, training and the participants’ opportunities for influence-making

In terms of the effects of local partnership, projects have a different profile depending on how well local partnership has materialised in them. In projects that realise the idea of partnership well, local partnership has a very significant effect on employing the unemployed, preventing desocialisation and improving opportunities for influence-making on the grass-root level, spontaneous local actions and the competence of the participants. The connection between the theme and these results is clear: the better local partnership has been realised in the projects, the better the outcome. In projects implementing partnership moderately or not much at all, partnership has a large effect on improving the competence of the participants and the quality of training. It should be noted that in projects implementing partnership poorly, partnership has significant effects related to the development of companies. The result of the evaluation means that also in projects implementing extensive partnership poorly, the project has been successful in creating a productive partnership model around an important target of the project (such as improving the quality of training or developing small companies. The project may not necessarily fulfil the more general and ideological objectives of partnership (such as more extensive spontaneous local actions and improvement in influence-making opportunities on the grass-root level).

These statistical results also support the influence-making information obtained from theme interviews and partnership models. The interviews also included projects with a poor overall partnership score. Despite the scores, the projects implemented quite functional and effective partnership models around their own more specific objective. These projects did not aim for all-embracing or ideological partnership structures but tried to solve a specific problem and succeeded to obtain a good level of commitment from the relevant actors. Even though the actors did not necessarily participate in all phases of the project and did not always have comprehensive opportunities to influence the progress of the project, partnership has been sufficient from the viewpoint of the results. It is also interesting that actions with initial focus on offering have had to be refocused on the basis of reactions from the target groups, for example, IT training offered to companies has had to be supplemented with new methods and services, because the companies have not had the facilities that the training provider had expected.

In projects with high partnership scores, the problem and target field is also much more extensive than in projects with lower scores. Good partnership models also give references to the breadth of the field. In these projects, problem-solv-
ing requires a very extensive group of actors and their commitment to attaining the objectives. The target groups have multilayered problems that must be solved in phases. The results may only be visible after a more extensive period of time, so the related partnership must also be long-lasting, maybe even permanent. Partnership had been started in the previous programme period, and the networks now implement established co-operation models. It is characteristic of this type of actions that they are rooted in the target groups’ own requirements and the opportunity to influence decision-making that concerns the target groups themselves. Spontaneous local actions must become more widespread and the competence of the participants must improve in order to prevent desocialisation and create opportunities for employment. Partly because of the target group, the promotion of entrepreneurship or creation of new companies is not such a significant result in these projects as the promotion of employment. These projects do not aim for the development of services for enterprises to any significant extent. The target groups of these projects also include handicapped people, and the targets have included the development of social entrepreneurship to some extent in order to employ these people. These experiments are still relatively uncommon, because the lack of legislation concerning social entrepreneurship is seen as a problem. The targets and directions of development are not clearly defined. More information about social entrepreneurship should be distributed to the projects, and they should be encouraged to conduct new experiments and develop the models of social entrepreneurship.

**Effectivity of partnership models**

In the statistical perspective, the realisation of partnership does not depend on the available monetary contributions. That is, partnership is realised equally well in small and large projects. However, the interviews indicated that money can promote the participation of the partners and their commitment to the project objectives. Businesses, for example, would not have participated in projects for the long-term unemployed without financial support. Free services have also promoted the participation of actors. On the other hand, the financial solvency of the projects has essentially influenced the availability of some public services. It can be noted that to some extent, the movement of money that has been important in the initial phase loses its significance as the project proceeds. The activity itself has proven to be so fruitful for the actors that they participate in it for other reasons than financial benefits. Businesses, for example, have noticed that the projects can find competent labour that would otherwise be impossible to find. Thus it is profitable to participate in the projects even if they do not generate immediate monetary returns. Social responsibility of companies seems to be increasing, even though dictated by slight compulsion.
The effectiveness of the models is demonstrated by other things besides results obtained by investing money. Partnership has been successful for example in eliminating overlapping functions in services provided by different sectors. Training is now more workplace-oriented and more correctly focused from the viewpoints of the target groups and the workplaces that make use of the competence (change of focus from offering to the customer). In addition, by taking the grass-root view into account, the actions have developed to be more focused on the regional level and on the target group level, which reduces the number of incorrect paths chosen. Partnership has also promoted the actors’ ability to cope with their work by means of work distribution, which may have very long-lasting positive effects.

Regional interaction

During the new programme period, the intention has been to build geographically more extensive projects. The objective has been to increase regional interaction and spread good operating models to a wider area. On the practical level, however, project functions have had to be separated and separate offices have had to be established in individual municipalities participating in the projects, for example. Operational co-operation has not functioned because of the geographical distances. The reasons may be very concrete. The target groups may not have the funds or other facilities to travel to the places where the project’s services are produced. This leads to a situation where the project operates well as separate units but does not create more extensive consistence or the intended cost savings.

Regional development in general must start from the region’s own needs and strengths, which is also emphasised in local partnership. Offices specific to individual municipalities and regions can be justified by the fact that they allow to focus in actual local problems and observe the needs and desires of local people. The most essential role of more extensive regional activity is the communication of good practices and experiences from one region to another. These proven operating models shall be applied from the local perspective, and regional interaction may prevent repeating the same errors.

The project field has been successful in implementing geographically extensive projects also from the operational viewpoint. However, these projects are characterised by their focus on developing a particular cluster, that is, they are limited to a specific line of business. Thus there is a clear formula regarding the functionality of regional interaction: operationally extensive projects require local focus, and geographically extensive projects require operational focus.
CHAPTER 2.

Effectiveness Estimation of the Theme

Summary: Local Partnership theme

Evaluating the justification of the theme from the target group viewpoint

As noted in connection with presenting the partnership models and evaluating the effects of the theme, the theme of local partnership has a very positive effect on the development of life control and increase in competence and by these means, employment and other activity in various sectors of life for target groups in a difficult situation in the labour market in particular. Partnership has also had a positive effect on the competence level and work-related wellbeing of employed people. On the other hand, the theme has not had any significant effect so far in creating new businesses and developing business services. The third sector has not benefited too much from the projects where it has been involved as the target group either, even though it has become more active in connection with the project operations.

Adults and aged people who have been unemployed for a long time have perhaps gained the most comprehensive benefits from local partnership. Models have been developed relatively equally for men and women alike. There are a lot of models for building extensive services for this particular target group in the project field.

Dedicated co-operation models have also been developed for the young long-term unemployed and those having a risk of desocialisation. These models focus more on training and practice periods in comparison with the models for adults. Besides the employment targets, seeking further education is seen as an important target. In projects for young people, the sequence of actions has a more rapid rhythm, which calls for a relatively effective approach in every phase. The models developed in the partnership spirit have gained good results in comparison to traditional workshops, for example, whose influence could be better. Thus young people require novel solutions with different alternatives. The weakness in models commonly offered for young people is that young people are categorised as a homogenous group, and the starting point is to offer the same actions to everybody. There are a lot of different services for unemployed people of more mature age, categorised by situation in life, physical fitness, desires etc. More diversified and customer-oriented services could be offered to young people. Thus the bottom-up principle works better for older people. Models utilising the activity and initiative of young people also exist, and it has been noted that active and responsible young people develop to active and responsible adults. The project can also be educational.

For the present, development of businesses by means of partnership is focused on developing the competence and work-related wellbeing of personnel. This internal development has created good results in the promotion of ability to cope with work and the equality of personnel (development of shallower business organisations). So, partnership has also been built inside businesses. On the other
hand, increasing co-operation and partnership between businesses has not been very successful. Businesses operate in intensive partnerships with educational institutions, for example, but not with each other. The obstacles may include competition issues and the protection of trade secrets. There are projects that involve a large group of entrepreneurs in different sectors, but instead of realising any business development objectives, the projects have improved the ability to work and created social networks. The original targets of improving the profitability of business, for example, have been buried in having fun together and building social networks. Partnership has been successful in projects built around a specific sector of business, however. The official categorisation guidelines do not include networking between businesses in the same sector in their definition of partnership. Cluster-specific operations have results-creating effects in the expansion of businesses in the sector and in securing the operating facilities for subcontracting companies, for example. New companies have also been established. This model also requires development starting from local and regional strengths, so the criteria for the local partnership theme are realised and the model may be presented as a good operating model of local partnership.

**Evaluating the justification of the theme from the viewpoint of existing structures**

Both the financiers and the project field have regarded the theme of local partnership important. Financiers view the theme as quite relevant, because it can be used to limit overlapping project operations and create permanent operations. In the financiers’ opinion, the theme improves the realisation of project goals and has strong significance also for the propagation of the results. In addition, the theme ensures that the projects are particularly focused on the needs of the target groups. Financiers must take their share of responsibility for implementing the theme and ensuring its realisation. It has been admitted that specific regional weightings and other criteria often surpass the themes when financing decisions are made.

Co-operation between the financier and the project still requires improvement, in particular the bottom-up principle is not always realised. The financier’s decisions affecting project structure sometimes seem to be arbitrary, and the projects do not necessarily have any opportunity to influence them. Projects that have persistently adhered to partnership and negotiated to a sufficient extent have been able to create a functioning channel of conversation and improve their own opportunities of influence.

From the project organisation viewpoint, local partnership naturally is a factor that facilitates the operations. When partnership is realised, tasks and responsibilities do not concentrate too much on specific people, and more creative solutions are made when ideas are planned in a larger group and by means of co-operation between partners that have not co-operated before. All the parties and people in-

Summary: Local Partnership theme
CHAPTER 2.

Effectiveness Estimation of the Theme

Summary: Local Partnership theme

Involving the partnership are able to improve their opportunities of influence, and the activities can be assumed to create results for a larger group of actors and target groups. The project field acknowledges the relevance of the theme, and even though the idea is understood and interpreted in many different ways, it is implemented well and creates good results in most projects.

Summary of the justification of the theme

The local partnership theme is implemented equally well and extensively in both the local partnership projects and other projects of the Association of Finnish Local and Regional Authorities. On the other hand, the theme of local partnership should be emphasised by creating a separate action line for it in the ESF programmes. Some people think that the theme is realised well in the horizontal direction in particular. The conclusion from the evaluation is that local partnership is an operating model based on cooperation between various actors and a basis for implementing actions that intend to realise the project goals. Local partnership is not an intrinsic value and the final goal of the project but a way to operate. It cannot be separated from the actions as a distinct goal, because it does not create new jobs, new companies or new educational structures by itself. It can be seen through partnership models that the theme is quite well implemented horizontally in relation to all strategic focal points, be they related to employing the unemployed, developing businesses or improving the quality of training. The theme is horizontally realised in a manner suitable for ESF operations and is applicable to any development programme as an operating method. In programmes implementing ESF actions, the theme is justified and relevant.

Focal points and suggested actions for development

Parties implementing the projects have varying understandings and interpretations of the local partnership concept. The theme occurs in different programmes with different intensity and emphasis. In the EQUAL community initiative, the local partnership theme is visible as a built-in operating principle that is taken into account already in the project selection phase. Evaluation criteria for project selection and follow-up indicators have been defined for evaluating the realisation of the theme. Other programmes have not implemented similar systems in terms of this theme, even though categorisation guidelines have also been issued to authorities in relation to the local partnership theme and a section for evaluating the manifestation of the theme has been added to the application form. With the exception of the EQUAL community initiative, local partnership seems to be an artificial theme in all programmes and as a concept, does not have a clear function in the operating lines and action entities. In terms of content, elements of the theme occur under various names in the ESF action entities, but the actual con-
cept of local partnership has not been established in the programmes yet. The theme should be promoted more as a concept, and evaluation criteria and follow-up indicators should be created just like in the EQUAL community initiative. The categorisation guidelines must be made clearer by removing the examples that create interpretation problems from the main categories and by clarifying the contents of section b in the first main category.

Some problems have arisen in the implementation of the local partnership theme. Some ESF coordinators admit that they cannot take the theme into account when preparing financing decisions because of a lack of instructions regarding the theme. The concept is unorganised also for the financing parties, and like in the previous programme period, it is regarded as an instrument for taking care of employment, not necessarily a horizontal theme, which means that its added value and relevance cannot be applied to projects belonging to the education sector, for example. New categorisation guidelines can slightly reduce the uncertainty, but more detailed guidelines and additional training on good practices achieved through partnership would open the theme better. After this, the coordinators would have better facilities to give instructions to the project field in implementing the themes.

Co-operation between financiers and projects requires improvement. From the financier viewpoint, more time would be required for getting familiar with the operations of the field, and the field should communicate more project-related issues to the financier. If problems arise in implementing the project, for example, these should be discussed frankly in good time. Project implementors feel that regional financiers in particular handle them using the top-down principle. Project bureaucracy and tinkering with small issues seems to have been increased after the decision-making power on financing was transferred to the regional level. In nationwide projects, the different interpretations of various regions cause problems, and the partial projects may have unequal positions due to this. More uniform guidelines and increased transparency is required both on the project level and the regional financier level.

In the project implementors’ opinion, the projects do not provide an opportunity to change with the changes in the operating environment. Even though the programmes emphasise the innovative approach of ESF actions, project implementation follows quite a conservative line. More experimentation is desired. Here, the attitude of the financiers is an obstacle. They do not want to take risks for innovative projects. It can be asked whether the regional financiers feel that they have insufficient decision-making power for taking risks or if they do not trust the projects’ potential to actually create something new and innovative. Boldness and experimentation should be emphasised more in training events for actors on the regional level.
Local partnership is implemented well as a horizontal theme, which is manifested by good partnership models implemented in various sectors of operation. The models are well suited for propagation in different parts of Finland. Building a partnership takes time. The projects where co-operation networks have been created in the previous programme period should be required to show quite influential results at this point, they should no longer concentrate on partnership-building only. Functioning and fruitful partnership requires relevant partners, and the financier should observe this already in the application phase and monitor it by some means during the course of the project. Monitoring in the application phase is facilitated by co-operation agreements that define the roles of the partners. In the project operation phase, network analysis is a functioning tool for inspecting the functionality of partnerships in addition to self-assessment. To ensure good partnership, all project structures could apply a model based on the phasing of EQUAL projects. The first phase should focus entirely on creating co-operation networks and operating plans, and the implementation phase should start after this.

In many projects, partnership building has started from the easy end and from utilising personal relations. There are projects where partnership is solely built on people that already know each other. This creates a danger of clique-building and inner circle operations that make it difficult for new people and parties to join in. Functioning partnership is open and transparent to all directions. Projects should be required to include partners with whom there is no previous record of co-operation. Even though most projects have involved new partners in some stage of the activity, the situation could be improved in the project planning phase in particular. The theme was clearly more visible in the project implementation phase than in the planning phase and the objectives. This leads to the conclusion that the theme has not yet become mainstream in all stages of operation.

All models have regarded the realisation of the bottom-up principle important and essential for the functionality of the model. In projects where customer surveys have been made in the initial phase and where the target group has been involved in project planning, false steps have been prevented better than in projects where the needs of the target group have not been investigated. This also emphasises the activity of the target group. In projects geared towards business development in particular, the target group expects a ready-made offering and may not necessarily be able to present its own desires and needs. Entrepreneur organisations could act as an active link in these cases. The project leader or person designated for development operations is also required to have sufficient expertise of business operations. Projects related to people in a difficult labour market situation include sector experts and target group experts with sufficient knowledge and skills for resolving the problems of the target group. Projects related to
business development have not necessarily utilised business expert resources in a similarly many-sided and comprehensive manner. More extensive expert partnership should be built around business projects.

Good and functioning partnership models have been built for promoting employment especially among the long-term unemployed. The target group has committed to the project operations to an excellent extent. The models have had moderately good employment effects as well. Well-focused models have also been built for business development. However, objectives related to creating new businesses and promoting entrepreneurship have not been realised particularly well. A separate “business path model” should be created for potential entrepreneurs. The operating principle would be similar to the employment path model, that is, the prospective entrepreneur would have continuous access to personal guidance, and various authorities and experts could create their own services on the path in the sequence demanded by customer needs. In addition to the project support person, the principal partners would include the tax authorities, a business advisor, representatives from parties offering corporate financing, marketing experts, accountants etc.

A commonly admitted problem point in partnership models is the co-operation between the educator and the project (target group and other actors). The contents of the training entities and the training methods are planned and implemented too much in a offering-oriented fashion, and the needs of the actual target group (such as the long-term unemployed) and the indirect target group (employers) are not taken sufficiently into account. Partnership models pay quite a lot of attention to this, but it cannot always be influenced. Ready-made training packages are seldom suited to the needs of the target groups, so new training methods and models must still be developed together with the target groups, ensuring that the target groups get involved in planning the training.

The role of the third sector as a beneficiary of the project actions is still not emphasised. It can best act as an active operator. In many projects, the third sector is a significant implementor of the actions, and has achieved a legitimate position as an equal partner in parallel to the public and private sectors. The third sector also acts as a project administrator to an increasing extent, which requires flexible financing solutions and partnership with solvent actors. Thus the lack of a buffer fund is not an obstacle; there are usable and propagable models for solving the problem.

In many projects, interaction between towns and rural communities has been developed from the viewpoint of bringing new competence to the countryside. People living in the countryside – mostly women – have been trained in quite extensive areas, improving the opportunities for employment and diversifying the industries. Urban dwellers have also moved to the countryside and established new small enterprises that contribute to making the rural operating culture more lively. Finland could have more of these projects. People who have participated in
these projects are a bit older in age, so similar projects could be focused on slightly younger people and the actions could have more long-term effects to the repopulation of rural areas. This way, the level of education in the countryside would also improve. Projects aiming to develop the countryside should pay more attention to the bottom-up principle and the ensuring of opportunities for influence on the grass-root level. This means that bidirectional interaction between towns and the countryside is not realised particularly well in the project field. Towns and the countryside are developed using the same concepts, and the parties wonder why businesses in the countryside, for example, do not participate in the operations. In addition to exporting competence to the countryside, it should also be imported from there to the towns. A simple solution is to diversify partnership so that rural actors are involved since the planning phase. Natural channels between actors in towns and the countryside may not exist yet, but projects can create them.

Local partnership has promoted the realisation of targets in all the target programmes in a significant way at best. Both financiers’ representatives and project actors admit that the theme has a significant effect on the realisation of project targets and creation of permanent operating models in particular. Functional differences related to partnership occur in various areas, but the analysis of evaluation questions and partnership models for each target programme revealed that the overall effects of the theme are quite similar regardless of the target programme. Even the obstacles to partnership are horizontal phenomena, not bound to the cultural characteristics of the regions.
ANTICIPATION AS A HORIZONTAL THEME
Evaluation of ESF-frame of reference
Summary of the Final Report

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1. GOALS AND IMPLEMENTATION OF EVALUATION

The main objective of the European Social Fund is to promote human resources and employment. The ESF-frame of reference consists of strategic points of emphasis and horizontal themes (Figure 1) that direct operations supported by the Fund in all programmes. In practice different emphasis are realised through different policies and measures.

Figure 1. Supporting pillars, strategic points of emphasis and horizontal themes in the ESF-frame of reference

The regulation on the European Social Fund states that the Social Fund should advance employment and vocational competence by sustaining anticipation. In Finland, in the period 2000-2006 anticipation has been made a horizontal theme that runs through all ESF programme work in the ESF-frame of reference. Thus anticipation should occur as a theme in all operations that are supported by the Fund in objective 1, 2 and 3 -programmes, and the Equal-programme.
1.1 Defining anticipation as a horizontal theme

Anticipation as a horizontal theme conforming to the integration principle

Anticipation as a horizontal theme conforming to the integration principle is included in all ESF programme work, from planning of the programmes to evaluation. The starting point in including anticipatory viewpoint in ESF programme work is anticipating changes in the socio-economic environment, and reacting to those changes (proactive anticipation). Through this, the needs of the operational environment are concretised, as well as prioritising them. Producing anticipatory information has a central part in the phases mentioned above. The programme process is followed through in planning strategies, setting goals for development, and implementation and project planning in the programmes. At this stage the emphasis is on utilising anticipatory information. The projects result in experience of how appropriate and efficient the interventions are, and this experience takes shape in the evaluation. Experience and evaluation are also sources of anticipatory information (Figure 2).

Figure 2. Anticipatory viewpoint in the ESF programme work
The horizontal theme of anticipation includes the idea of taking future changes into account in the projects. Essential to the theme is the extent to which already existing anticipatory information is utilised in the planning phase of the projects. Another important question is, whether the projects produce new anticipatory information, and whether they develop new methods of anticipation. In addition to the traditional organisationally and regionally focused approach, broadly defined the theme reaches also individual level, e.g. through mapping out the forming of realistic vocational goals (control of life and career). The theme of anticipation is defined in the ESF-frame of reference as follows:

“Horizontal theme of anticipation: this includes anticipatory viewpoint in all ESF-programmes. The programmes should prevent social problems and advance solving complexes of problems, and on the other hand support unprejudiced seeking and utilising of new possibilities. Anticipation aims to produce information that can be utilised in the directing and guidance of ESF-programmes. This may occur as e.g. so-called reorganising and utilising weak signals. On the other hand, anticipatory viewpoint means utilising already existing anticipatory information in the planning and implementation of programmes, as well as promoting practices that support anticipation. Anticipation should be included, when appropriate, also in the selection criteria for the projects. Good anticipation ensures the best possible effects of projects.”

It is relevant for this evaluation to make a clear distinction between the horizontal theme of anticipation and actual anticipation projects. The horizontal content of anticipation is defined as adopting of anticipatory viewpoint all ESF programme work. Thus the projects should prevent problems and support unprejudiced search and utilising of new possibilities.

It is important in the evaluation of the themes to take notice of their different roles in the projects. Promoting anticipation and local partnership aims first and foremost to improve the efficiency of the projects. Promoting information society, equality and sustainable development in the ESF-frame of reference are, however, target-oriented operations.

1.2 Contents of the evaluation of anticipation as a theme, and evaluative questions

The aim of this evaluation is to find out how the horizontal theme of anticipation has been realised in ESF programme work in the first half of this current period. Attention is paid also to how the programmes support the national action plan for employment through the theme of anticipation.

The objective of the evaluation is to create a practical picture of the realisation of the theme. The evaluation is divided into analysis of the contents of the theme, analysis of implementation and projection of output and justification of the
theme. For the part of the theme of anticipation, the evaluation focuses on its contents and implementation. Through these the output and justification of the theme can in the progress report be preliminarily evaluated.

The ultimate goal of the evaluation is to draw conclusions of the functioning of the theme and its success in the ESF-programme work. In addition to this the aim is to produce concrete recommendations for developing operations as well as to produce information of good practices and operational models, from the point of view of anticipation as a horizontal theme. The evaluation aims to answer the following evaluative questions set in the assignment:

1. Do the projects prevent problems in the labour market or do they only answer to an acute need?
2. Do the projects produce anticipatory information, or do they utilise already existing information?
3. How is the produced or acquired anticipatory information utilised?
4. Do the projects develop methods for anticipation?
5. Do the projects offer training in preparedness for anticipation, or anticipatory methods, or utilising anticipatory information?
6. Do the projects advance anticipatory co-operations between different operators?

1.3 Implementation of the evaluation

The fact that the evaluation is focussed according to mainstreaming principle on ESF-programme work as a whole, can be considered a special feature is thematic evaluation (Figure 3).

Following the aforementioned integration principle, the evaluation process consists of analysis of strategic level, implementation and development and acceptance of projects, and implementation of projects. The analysis of the strategic level is based on programme documentation. Analysis of execution of programmes and development and acceptance of projects utilises results from interview of ESF-co-ordinators (N=15) as well as information from register materials (N=500). The realisation of the theme in the implementation of the projects is analysed through the results and case studies of an interview of the implementors of the projects (N=949).

The analysis of the strategic level and development and acceptance of projects/execution of programmes aims to create a picture of the internal and external coherence and successfullness of ESF programme work, from the point of view of anticipation -theme. A synthesis of different points of view creates a projection of the potential results and effects of the theme in the projects, within the limits of the progress report.
Figure 3. Starting points of thematic evaluation

Figure 4. Evaluation process

Summary: Anticipation as a Horizontal Theme
2. RESULTS AND RECOMMENDATIONS FOR DEVELOPMENT

2.1 Horizontal theme of anticipation in the ESF-frame of reference

Anticipation is included in the ESF-frame of reference as a horizontal theme, which should be included in all operations in the programmes conforming to the so-called mainstreaming principle, in other words, from the planning of the projects through to evaluation of the implementation. The horizontal theme of anticipation in the ESF-frame of reference covers, as well as the actual anticipation projects, also other projects that require anticipatory viewpoint, to which is related also utilising and producing anticipatory information, and developing methods.

The objective of the European Social Fund is to advance the development of human resources and advancing employment, and because of this, anticipation and future-oriented point of view should be included in efficient realising of project operations. Anticipation as a theme is, in the frame of reference, closely related also to the relationship between increase education and competence capital, and recursiveness of employment, in which justifiable choices in educational policy advance employment, but at the same time the structural changes in employment create new needs and emphases in education.

In the horizontal theme of anticipation, the definition of anticipatory viewpoint is very abstract. By definition, it includes developmental operations that are clearly future-oriented, and which include also utilising and producing anticipation information. It is characteristic to the ESF-frame of reference that through developing competence capital and advancing employment there are reactive, preactive and proactive elements related to the theme that in their part form the different levels of the occurrence of the theme (figure 5). In ESF-operations reactivity means recognising acute problems and having an impact on them. Including pre- and proactive levels in ESF programme work gives the theme content,
and thus through the theme and the frame of reference it is possible to talk about developing competence capital and employment that is both prepared for changes and future-oriented.

The main results of evaluation are summarised in Table 1. Following the mainstreaming principle of horizontal themes, the evaluation results are presented from strategic level to implementation of projects.

Based on the results, on the strategic level the theme of anticipation emphasises on developing competence capital and employment, that is both future-oriented prepared for changes. Thus in the emphases of different programmes, the theme is focused on preactive and proactive future-orientatedness. In development and execution of projects as well as implementation the same is realised, in certain measures, but correspondingly especially projects that aim at social inclusion focus on reactive operations, and this way aim to interfere in acute socio-economic problems (Figure 6).

The horizontal theme of anticipation is the most emphasised in the measures that aim at developing connections between education and working life, promoting professional mobility, and advancing research and development. In the issues mentioned above, the theme occurs as developing competence capital that is prepared for changes and future-oriented. Through condensing working life relations these are integrated also in employment that is both prepared for changes and future-oriented. Preparedness for changes is much emphasised in the operations on the enterprise sector, and through this also the preparedness to anticipate competence demand. However, partly the projects only answer to the acute needs of enterprises.
### Table 1. Main results of evaluation

#### STRATEGIC LEVEL:
Strategic analysis of ESF-frame of reference and programme-analyses

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| Programme documents, ESF-regulation and government programme. | Including anticipation as a theme in programme strategies. | - The recursive relationship between education and employment, defined in the ESF-frame of reference, includes anticipatory standpoint in the strategic level.  
- Anticipatory standpoint is clearly noticeable in the setting of the strategic emphases of the programmes.  
- The setting of objectives for the programmes is preactive of proactive by nature.  
- The theme of anticipation brings clear additional value to the strategic level as setting of objectives in order to make the programmes more effective. |

#### PROGRAMME WORK:
Analysis of implementation and development and acceptance of projects

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<tr>
<th>Sources of information</th>
<th>Main objective</th>
<th>Main results</th>
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| Co-ordinator interviews (15). | Including the theme to the implementation and problems related to it. | - Anticipation and utilising anticipatory information were considered an important route to increasing the efficiency of the projects, but not as an actual selection criteria.  
- The concept of anticipatory standpoint was considered unclear and requiring of clarifications on the strategic level.  
- The role of anticipation in increasing the efficiency the projects could be enhanced by clarifying the contents and bringing forward new openings.  
- Commitment of projects to the theme in the implementation phase was considered suspicious. |

| Data on the project register (project applications, sample of 500 projects). | Manifestation of the theme in selected project applications (selection criteria). | - Anticipatory standpoint was emphasised the most in projects that aim at developing schools and enterprises.  
- Anticipatory standpoint was manifested in the project applications through utilising experiences from previous projects and anticipation projects of the previous programme period, as well as through preliminary clarifications, producing anticipatory information and producing methods for anticipation.  
- Anticipatory standpoint was manifested in project applications most clearly as utilising the information produced by the same implementing organisation in previous projects.  
- There were 12 actual anticipation projects in the sample, and they were mainly thematic or focused on certain industries.  
- Anticipatory standpoint was not manifested in the project applications as a clear criteria for selection, unlike e.g. information society and equality. |
In the projects aiming at preventing socio-economic problems the operation in most cases focused on acute needs, and through this their nature was strongly reactive. For example, recruitment services, workshops, and training of the unemployed. The theme is, to some extent, integrated into the training of the unemployed and other projects that aim at finding an individual path to employment.
through their strong connection to labour market. In part of the projects there was a clear aim to answer the demands of the labour market, and thus also to local bottleneck areas in competence conforming to the anticipatory viewpoint.

2.2 Horizontal theme of anticipation and the national action plan for employment

The primary objective of the national action plan for employment is sustaining the functioning of the labour market and ensuring the availability of labour force. The demand for labour force focuses mainly on trained professionals, and thus the central challenge in labour and educational policy is to answer to the structural change in work life and changing need of competence.

As well as securing the availability of labour force, the national action plan for employment focuses on maintaining of an adequate demand of labour force. This requires, for the part of developing competence, also perceiving structural changes in employment, which also creates new needs and emphases on education. Thus the national action plan for employment emphasises also the recursive relationship between employment and education, in which the right choices in educational policy advance employment, but at the same time the structural changes in employment create new educational needs and emphases. Through recursiveness the theme of anticipation included in the ESF-frame of reference supports the outlines of the national employment policy on not only strategic level but also on operational project level, in which the theme is closely related to the projects that aim at developing competence.

In the national employment policy it was considered important to develop competence conforming to the principles of life-long learning in preventing youth unemployment, long-term unemployment and social displacement. According to the results of this study, the ESF-projects aimed at these problem groups have aimed to enhance individual’s potential for employment by finding out and further enhancing their level of competence, and mapping out realistic career and educational choices. However, the importance of anticipation could be increased for these parts by connecting them more strongly with paying attention to the demands of labour market in both national action plan for employment and ESF-frame of reference.

In the projects focused on enterprises, developing enterprises’ preparedness for anticipation as well as developing competence was considered important. Thus paying attention to the theme in ESF-projects has supported the objective of the national employment policy to support the development of business operations and operational environments of enterprises. The horizontal theme of anticipation also creates an opportunity to connect projects that aim at promoting equali-
ty to become a part of the challenge created by the structural and competence changes in bottleneck areas in employment. However, with few exceptions, ESF-projects have not been able to take up this opportunity.

2.3 Evaluative questions and recommendations for measures

In the following, answers are given to the question set for the evaluation of the theme. The questions are also a summary of the contents and manifestation of the theme in ESF programme work. The answers give form to the occurrence of the theme with mainstreaming principle from the strategic level to execution of programmes, development and acceptance of projects as well as the implementation of the projects.

**Do ESF-projects prevent problems on the labour market or do they only answer to an acute need? Is the viewpoint of the ESF-Projects future-oriented?**

**Strategic level.** The horizontal theme of anticipation runs through the different strategic emphases of the ESF-frame of reference in different objective programmes (1, 2, 3 and Equal), and thus the strategies of the programmes aim to prevent problems on the labour market and, on the other hand, to pay attention to the potential positive development. On the programme level, the theme of anticipation is most closely connected to measures that aim at utilising labour demand and advancing employment, as well as improving the quality and efficiency of education. In addition to this, however, the guidelines take into account also, for example, developing the enterprises’ preparedness for anticipation and preventing social displacement through social inclusion. In operations that aim at equality between sexes the theme of anticipation occurs correspondingly as, for example, taking into account the structural changes in female-dominated fields.

**Execution of programmes and development and acceptance of projects.** ESF-co-ordinators have an important role in preventing problems on the labour market and the realisation of the future-orientedness in development and acceptance of projects. According to the results, from the points of view of different financing parties, the horizontal theme of anticipation in the execution of programmes and development and acceptance of projects was considered an important part of the developmental operations. In the process of selecting projects there is an attempt to pay attention to the fact, how does the development and acceptance of projects meet the operational environment and the needs created by changes in it. The importance of the anticipation that comes through the ESF-frame of reference is well understood. On the other hand, anticipatory viewpoint in the projects was considered unorganised, and much dependent on the visions of development of the operators. For this part the contents of the theme in implementation need to become more concrete.
According to the results, the directive influence of the theme of anticipation on execution of programmes and development and acceptance of projects comes strongly from the own emphases of the regional strategies and employment and economic development centres. Anticipation has effected the forming of them, as well as the application process of the projects. It was considered a threat to the theme of anticipation in regional programmes that the strategies planned in them do not support having an impact on the problems noticed in the anticipation. For example, the emphases of the regional strategies may be different in what comes to changes in operational environments.

The strength of the theme in the execution of programmes is that by taking the it into account the projects can be directed to serve long-term future-oriented development. This ensures the prevention of problems on the labour market, and supporting future-oriented development. On the other hand, acute regional needs may become a problem in the realisation of the theme. Part of the socio-economic problems are acute, and require immediate solutions. In these cases the most important in the selection of the projects is that they are immediately based on demand.

The projects that include the theme in the execution of programmes stand out from the mass. For example, in the projects that aim at preventing social displacement, there has been a clear increase paying attention to the theme. Recognising problems and efficient interventions is emphasised in their implementation. A problem in the execution of programmes of the projects directed at enterprises was that the contents and objectives of the projects often may change despite the fact that the basis of the original objectives is, for example, anticipatory information of an upcoming labour shortage.

According to the analysis of the projects documentation, anticipatory viewpoint was in most cases connected to projects that develop learning on the job, developing schools and entrepreneurship, as well as research and development. As a whole, development and acceptance of projects was also strongly integrated in work life, following the ESF objectives, and thus in preventing problems on the labour market and future-oriented development. In practice, organising and networking into economic life was central content in most of the applications of the projects. Developing education and working life co-operation, as well as immediate development of the enterprise sector make possible the developing of human resources taking into account also the changing labour demands labour market, following the regulation on ESF.

It is also good for the theme of anticipation that part of the projects aiming at prevention of social displacement were characterised by anticipatory viewpoint.
Implementation of the projects. As a whole, the theme of anticipation and this way also the future-orientatedness of the projects focused on the projects that aim at developing schools and enterprises. In addition to this, a survey of the realising parties of the projects confirmed the picture gained from the evaluation of the assignment and implementation that the theme of anticipation has gained strength in the projects that aim at preventing social displacement. In practice this has been realised in individual mapping out of competence and need for education, as well as paying attention to labour demand. In these interventions the goal has been to have an preventive impact on both socio-economic problems and labour demand through social inclusion.

In the evaluation of the implementation it was considered a threat that the contents and objectives of the projects that aim at developing the competence enterprises may become short-sighted despite the fact that they are based on anticipatory information of an upcoming labour shortage. According to the analysis of the project applications and the survey of the implementors, however, in the projects related to enterprises, and the competence of their staff and management the theme of anticipation was emphasised more than average. In the projects aimed at enterprises the central problem remains, to which extent do the objectives and implementation correspond to each other. According to the survey, the theme has kept its contents also in the implementation.

Recommendations for measures

1. On the strategic level it is important to make the concept of anticipatory viewpoint concrete, so that its contents would become clear to both the party deciding on the financing and the implementors of the projects
2. According to the results of the study, the theme is gaining strength in the projects that aim at preventing social displacement. It is important to the additional value of the theme that in the project implementation they would be connected to the anticipatory information about the competence and labour demands of the economic life. The target group is problematic, and thus directing the measures to meet the demands found out in the anticipation is difficult. However, an attempt to this should be encouraged. Co-operation between projects and local enterprises is also important in this respect, and makes possible the producing of practical information for the projects.
3. In planning development programmes the co-operation of different authorities on regional level should be increased. Thus the regional strategies should be made flexible, so that the changes that occur in the operational environment during the period could be paid more attention in the developmental operations.
4. In the projects that aim at developing enterprises and their personnel, the threat that the implementation of the theme of anticipation may be weakened in the implementation must be taken seriously, although the survey of the implementing parties did not support this suspicion. Utilising methods, such as the national MONITAITO-concept, are considered to have a strengthening impact on the execution of programmes, development and acceptance of projects, and implementation of the projects.

**Do the ESF-projects produce or do they acquire anticipatory information, or do they utilise already existing anticipatory information?**

**Strategic level.** Utilising and producing anticipation information focused at the strategic level on promoting labour demand and employment and in the setting objectives for these interventions. Paying attention to the changing of the labour market and competence demands then become the central contents of the strategies in different programmes. For those in weak position in the labour market, focus was on mapping out realistic career and educational choices, which, however, had on the strategic level remained rather distant from actual anticipation. In the operations that aim to promote equality of sexes, anticipation included mainly paying attention to the changes in female-dominated industries.

**Execution of programmes and development and acceptance of projects.** According to the results of the study, anticipation is utilised in the directing of the developing and acceptance of projects by different financing parties, although it was not generally considered a systematic practice. Utilising anticipatory information or producing it was not considered a prerequisite or conscious selection criteria for approving of projects. In the implementing of the programmes focus was on the fact that projects in which anticipation was clearly included were most likely to be selected. In the selection process anticipation was considered a definite strength in the projects.

The biggest problem in utilising and producing anticipatory information in the execution of programmes is the limited resources of the project implementors, which makes it impossible to enter into anticipation in detail or making careful preliminary surveys. Another problem was that anticipatory information is often too contradictory for application in practice, irrelevant, and hard to come by. Producing information that is relevant for a certain operator often requires a specially tailored anticipation project.

According to the analysis of the register materials, utilising anticipatory information was connected to the projects’ own preliminary surveys and the experience gained from the previous programme period, and not as much utilising the anticipation projects of the previous programme season. The picture given by the projects documentation supports also the views of the ESF-co-ordinators of the
CHAPTER 2.

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Summary: Anticipation as a Horizontal Theme

extent to which the utilising of anticipatory information occurs in the projects. Based on the register materials, utilising anticipatory information from the previous period, making preliminary research and utilising previous projects was focused in the projects that aim at developing enterprises and their staff as well as developing schools. In workshop operations and training of the unemployed the focus was on the utilising of experience from projects of the previous programme period. Utilising the anticipation projects of the previous period occurred only in those projects that attempted to take into account social inclusion as well as labour demand (e.g. bottleneck areas in education and competence).

Producing anticipatory information focused on developing the operations of schools and projects dealing with learning on the job. The central content of the projects was, for example, strengthening interaction between economic life and education, and anticipating the future demand for competence. In addition to this, anticipatory information was produced in projects that aimed at developing enterprises and their personnel, in which the goal was mainly on improving the competitive strength of the enterprises. Most often they attempted to map out e.g. the future competence demands of the enterprises. In the actual anticipation projects that were studied in the research, focus was on the objectives set for the programmes documents about anticipating changes in the labour market, especially through recognising changes in the competence and economic structure.

Implementation of the projects. According to the implementors, utilising anticipatory information and anticipation projects from the previous season has had an important role in the planning of the projects. The picture of the utilisation of the anticipation projects from the previous period is not, however, supported by the analysis of register materials and the results of the survey of the ESF -co-ordinators. On the other hand, the importance of anticipation in individual projects does not necessarily manifest itself clearly enough in the project applications, and in most cases this remains “silent knowledge” between the financer and the implementor. An optimistic estimate is that the utilisation of anticipatory information has gained a bigger role in the implementation phase.

According to the implementors of the projects, anticipatory information was produced in a remarkable part of the projects. The producing of anticipation data focused mainly on the projects that aim at developing schools and learning on the job, and development projects of enterprises. The results show that anticipation data was remarkably produced also in projects for training the unemployed, and projects that aim at preventing social displacement. In most cases these are about the mapping out of the competence demands and need for education of the target groups, and not so much about actual anticipatory information.
The objectives of the actual anticipation projects in the implementation phase were focused on in finding out the future demand of competence and improving the quality of education. More than the quantitative anticipation, the emphasis has clearly been on qualitative anticipation. For example, in the projects that concerned educational needs, the emphasis is not on the “quantity of construction workers”, but on “what the construction workers should know”. A positive feature in the implementation of the projects is that the attempt to utilise co-operation and practical utilising of anticipation data has remained an important theme in also the implementation of the projects.

**Recommendations for measures**

1. It is important for regional development that the survey projects of each field are implemented, and based on them the execution of programmes can also be monitored. The surveys should be practical and thus easily utilised also by the project implementors.
2. Actual anticipation could be more closely connected to the operations of the parties utilising it. For example, anticipation methods could be more widely connected to projects that develop learning on the job, which in its part would produce practical anticipatory information for schools. This would also ensure that the teachers’ “tackit knowledge” would be put to a wider use.
3. One solution to promote the making of careful preliminary surveys and utilising anticipation data could be “starting money”, that would be granted to the project in the phase when a feasible idea has been developed far enough and the basic structure for the implementation exists.
4. Utilising anticipation should be supported by directing the implementing party in the project negotiations and encouraging them to familiarise themselves with previous anticipation projects, research, and other corresponding projects. Thus the theme of anticipation is sustained, and the utilisation of previous experiences and good practices is ensured.

**How is the produced, acquired or already existing anticipation data utilised?**

**Strategic level.** The central objective of the theme of anticipation in programmes was improving the efficiency of operations. The anticipatory information produced or obtained this way should be utilised to improve the efficiency of the projects. Through improving the efficiency of the projects, the contents of the theme and paying attention to it can thus be expected to grant additional value to the projects and the realising of the objectives of the strategic level in the implementation.
CHAPTER 2. Results and Recommendations for Development

**Summary: Anticipation as a Horizontal Theme**

Execution of programmes and development and acceptance of projects. In the execution of programmes, anticipation in the implementation of the programmes was considered a strength in the application process of the projects. According to the objectives of the strategic level, the most clearly positive effect of paying attention to the theme of anticipation was considered to be improving the efficiency of the projects.

Analysis of the project register showed that utilising anticipation was mainly connected to planning the implementation of the projects. According to the results, the role of anticipation in the programmes has been well understood by both financing and implementing parties.

Analysis of the development and acceptance of projects shows that in the actual anticipation projects, information was mainly attempted to developed to support organisations in charge of regional development, schools and operations of labour administration. In addition to these, there was an attempt to pay attention to private sector as well in the development and acceptance of actual anticipation projects. The practical producing of anticipatory information and utilising anticipation that manifested itself in the project applications is, however, the most important obstacle in the realising of the project objectives.

**Implementation of the projects.** According to the results of the study, anticipatory information was utilised in the planning of the projects in selecting target groups, planning operations and setting goals. Utilising anticipatory information in the implementation of the projects as effected to a great extent the expected results of the projects. This was especially manifested in projects that, based on the survey, utilised the anticipation projects of the previous programme period. The survey showed that the active producing of anticipatory information and developing methods has strengthened the ideas of the effects of paying attention to the theme to the results of the projects.

The actual anticipation projects analysed in the study focused mainly on anticipation of changes in the labour market and competence demand. As mentioned before, the central content of the projects was especially anticipating competence demand and changes in economic structure to support organisations in charge of regional development, schools and labour administration, as well as the operations of enterprises. According to the implementors of the projects, the expected effects after the implementation of the projects will be manifested in improvement in meeting of demand and supply on the labour market, and how vocational education corresponds to work life. Recognising competence demands makes it possible to plan education to meet the changing demands of working life. In the long run this is expected to effect for example reducing the recruitment problems of enterprises (bottleneck areas) as well as improvement in employment after education.
Recommendations for measures

1. Utilising anticipation information can be promoted by learning networks between implementors of projects and regional authorities. Learning networks enable coherent interventions, which seek answers to specific problems.

2. For promoting exploitation of anticipation it is relevant, that the horizontal theme of anticipation is made more concrete in organisational and individual level. In that way anticipation can be connected naturally to individuals and organisations way of action.

3. For example, connecting anticipation to the quality systems of schools should be supported. In that way anticipation is integrated to strategic planning and practical ways of action.

Do ESF-projects develop methods of anticipation?

Strategic level, execution of programmes and development and acceptance of projects. Developing methods of anticipation manifested itself in programme documents in the operations aimed at improving the quality and effectivity of education. In these cases the strategic level means utilising connections to working life to anticipate changes in competence demand and economic structure. Developing methods of anticipation was focused especially in the objective 2 programme in Western Finland; focus was on developing anticipation systems into regional tools.

From the point view of monitoring the execution of programmes and development and acceptance of projects, for example the model of monitoring bottleneck areas in supply of labour (anticipation method) developed for objective 2 programmes can be seen as the next step towards a system, which gathers together the views of different financing parties, views on regional development and developmental needs. Utilising the model requires that different operators produce anticipatory information, and form an overall picture of the directions of regional development, and the focusing of operations, especially from the point of view of bottlenecks in competence.

As a whole, integrating anticipation methods into actual operations was considered important in developing the methods. In practice this means, for example, anticipation systems connected to learning on the job. According to the analysis of project applications the developing of anticipation systems related to this is indeed focused on developing the operating of schools (educational establishments) as well as projects about learning on the job, which are closely connected to strengthening the relationship between economic life and education, and thus also paying attention to changes in working life from an educational point of view.
CHAPTER 2.
Results and Recommendations for Development

Summary: Anticipation as a Horizontal Theme

Implementation of projects. According to the survey of the project implementors, methods of anticipation were developed, but the emphasis was mainly on producing anticipatory information. According to the results, anticipation methods were developed in the implementation of projects that aim at developing operations of schools and developing education and learning on the job, as well as in projects that aim at developing enterprises and their personnel. In addition to these, according to the results, anticipation methods were also developed in different workshop projects and training of the unemployed.

Analysis of the development and acceptance of projects shows that in the projects related to enterprises the methods of anticipation most often are connected to improving the enterprise’s preparedness for anticipation. One example of the anticipation methods that are related to developing enterprises is the national MONITAITO –analysis, which aims to map out, future-orientedly, the developmental needs in the business operations and staff of the target enterprise.

In workshops and projects related to preventing social displacement, methods of anticipation can not be considered to be actual anticipation, but largely practices which are utilised to improve the control of life of individuals. This is often connected to mapping out the competence and educational needs of the individual, and measures tailored based on them, through which a basis for realistic educational and career choices is formed.

An important issue in developing of anticipation methods that is realised in actual anticipation projects is how practical they are and, also, how well they can be utilised. In the anticipation projects analysed in the report this been taken into account. Also positive co-operation between different organisations was manifested in the developing of the methods (e.g. labour administration, schools and enterprises). Also, in some cases, integrating actual anticipation projects, and methods developed in them, into projects about learning on the job has been realised. The strength of these projects is that the information gained from utilising them is used by the utilisers on both individual and organisational level. As well as with anticipatory information, the focus is on the fact that the actual utilisers are involved in the planning.

Recommendations for measures

1. The starting point in the development of methods of anticipation should be the utilising party. Thus the growth of the competence of the utilising party would be ensured on both individual and organisational level. Only this way the information produced by the operations can be considered to become a part of practical operations. For example, it is easy to connect developing anticipation methods to projects about learning on the job.
2. Recognising possible co-operating parties, and networking with them already in the early stages of the project is very important to the utilisation of the results.
3. The methods of anticipation that are developed should be easily copied to the context of different regions and organisations. This way also the spreading of them is ensured.

**Do the projects offer training in preparedness for anticipation or anticipation methods or utilising anticipatory information?**

Strategic level, execution of programmes and development and acceptance of projects. As a whole, in all programmes the focus was on the developing of the enterprises own facilities for anticipation. In the follow-up of the execution of programmes, the projects that aim at developing the enterprise’s personnel were considered problematic to some extent. The reason to this was that anticipation has not acquired a very strong position in enterprises. Strategic thinking in the enterprises often works on a short timespan, and thus the enterprises often are unable to direct the developmental operations for a longer timespan. The strategic emphases and development and acceptance of projects, for their part, have attempted to solve the aforementioned problem by attempting to develop the preparedness for anticipation in enterprises.

In actual anticipation projects, according to the project application, there was an attempt to also advance co-operation between operators and advance utilising anticipation. In these projects the focus was especially on the practicality of these projects and the clear anticipatory information, and methods gained through cooperation. This may be partly due to the fact that in the previous period there was little utilisation of anticipation projects in relation to the resources tied to them.

**Implementation of the projects.** In projects that aim at developing enterprises, the main objective was to advance their competitive strength. In most cases this was connected to developing competence and improving the preparedness to anticipate competence demand. In the projects aimed at developing enterprises and education it is be important to attempt to ensure the continuity of the anticipation processes created in them, and through this, for example, to ensure the accumulation of the enterprise’s preparedness to anticipate and strategic thinking.

There was an attempt to promote co-operation between operators in utilising anticipatory information in the implementation of actual anticipation projects, and thus also an attempt to promote methods of anticipation. This is largely considered a prerequisite for realising the objectives of actual anticipation projects.
Recommendations for measures

1. In the projects aiming at improving the enterprises’ preparedness to anticipate there should be an attempt to make sure that they have a permanent impact on the strategic thinking on the enterprise sector. In these cases the preparedness to anticipate is accumulated.

2. There should an attempt in actual anticipation projects to ensure the continuity of the use of methods and the practical utilisation of anticipation information, through which the objectives set in anticipation projects are realised.

Do the projects promote anticipatory co-operation between operators?

Strategic level, execution of programmes and development and acceptance of projects. Anticipatory co-operation occurred in different programmes in, for example, developing co-operation between enterprises and different operators (educational organisations, public administration). Anticipatory co-operation is linked to the strategies of the programmes also through local partnership. Unfortunately, however, this is not openly written down in the contents of anticipation or partnership as themes.

Anticipatory co-operation between different financing parties is important in the execution of programmes. Monitoring bottleneck areas in competence can be considered an example of a system whose the introduction has had positive impact on the increase in co-operation. The strength of the system is that in utilising it authorities must produce information from their own point of view, but at the same time attention must be paid also to the characteristics and needs of the operations of others. This also condenses the co-operation and creates a more holistic picture of the state of the area of operations and the interests of different financing parties from a developmental viewpoint.

Implementation of projects. According to the survey of the project implementors, there was an attempt to develop anticipatory co-operation with the help of local partnership and co-operation networks. Actual anticipation projects attempted this way also to promote utilising anticipatory information and methods. In addition to these there were promising examples in the projects dealing with the increase in co-operation between labour administration, enterprises and schools through constructing common methods of anticipation.

The effectivity of anticipation, according to the inquiry, was clearly connected to the theme of local partnership, which can be seen as a critical part of the success of anticipatory information and methods, and spreading them. The most important part of anticipation is its applicability and practicality. This requires, in both anticipation projects and in the development and acceptance of projects in general, practical creation of contacts with e.g. economic life.
According to the survey anticipation was included in the final reports of the projects and the recommendation for measures. Thus it is important for the theme that, for example the anticipatory information produced in the projects is documented, so that it is also in disposal of others. However, utilising networks can be considered to have better effects on utilising the experience gained.

**Recommendations for measures**

1. On strategic level there should more emphasis on the importance of anticipatory co-operation. From the point of view of the theme of anticipation, this could be carried out through the theme of local partnership. Paying attention to local partnership (as a theme) in the light of the results brings, without question, positive additional value for the theme, and therefore connecting them should be also considered on the strategic level. Central content would then be e.g. co-operation of schools, labour administration and enterprises, and implementors of local projects from an anticipatory viewpoint.

2. A prerequisite for the success of development and acceptance of projects is that the participating authorities on both national and regional level form a learning network, through which the objectives characteristic of different authorities create a more holistic picture of the state of the operational field and needs for development. Learning networks function as feelers and interpreters of the development acceptance of projects. This requires co-operation between organisations. For example, utilising the bottleneck model of objective 2 – programme (anticipation method, which charts bottleneck areas in labour supply), the central input in the ESF programme work has been the condensing of co-operation between authorities.

3. Anticipatory co-operation between operators should be advanced. In practice this means horizontal (e.g. schools as project implementors) and vertical (e.g. schools and labour administration) networking, in which should be paid attention to in the co-operation of both different fields of administration and project implementors.
3. CONCLUSION

Important for the justification of horizontal themes (information society, equality, local partnership, sustainable development and anticipation) is the additional value that they bring to the programmes. In practice this means also that the contents of the themes should be such that they can be thoroughly paid attention to in the form of integration principle on strategic level, execution of programmes and implementation of projects. However, their contents should not be taken for granted from the point of view of producing additional value.

According to the results of the research, the content of the theme of anticipation is adequate, so that paying attention to it has been possible in all ESF-interventions. The theme is easily connected to ESF-operations, and the additional value brought by it is connected to the improving the effectivity of the projects. On a whole, the content of the theme meets well the strategic objectives of ESF programme work, execution of programmes and characteristics of project operations. The role of structural funds is much emphasised mainly in starting the development processes. This way developing competence capital, employment and promoting business operations are an important part of the operations of the European Social Fund. Due to the objectives of developmental operations the horizontal nature of anticipation (as a theme) is a natural part of the strategy and operative operations that aim at implementing them. The clear additional value of the theme, improving the effectivity of the projects, creates also the basis for the justification of the theme in the ESF-frame of reference.

According to the estimate of the project implementors, paying attention to the theme has clearly has an impact on the expected results of the projects. This is much dependent on the extent to which the implementing and financing parties have succeeded in finding and interpreting the weak signals of changes in the operational environment, and how the operations based on them in both development and acceptance of projects and project implementation are able to prevent problems in the future, or strengthen the accumulation of positive development.
Summaries of the evaluation reports on the strategic priorities and on the five horizontal themes defined in the ESF policy frame of reference:

Information society, equal opportunities, sustainable development, local partnership and anticipation