

DESEO

DEVELOPMENT OF DISTRICTS OF EQUAL OPPORTUNITIES IN SOCIAL ECONOMY TERRITORIES



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development of districts of equal opportunities  
in social economy territories

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REVES  
European Network of Cities and Regions for Social Economy

*Local Authorities and Social Economy  
A Partnership for Local Sustainable Development*



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## PROJECT CONTEXT

REVES, the project leader, is a unique European network that brings together local authorities and social economy

actors in order to create stable partnerships and common policies for a socially sustainable local development and social inclusion. It was officially created in September 1997 as an international non-profit association, by a group of cities such as Östersund (Sweden) and Reggio Calabria (IT) in collaboration with the European Confederation of workers co-operatives, social co-operatives, participative enterprises (CECOP). The Reggio Declaration was written. It became the REVES Charter defining the targets and development lines of local and international co-operation within REVES. In 9 years of REVES' existence, its key concepts – partnership, participation, social cohesion and new quality employment for the creation of a new pluralistic local welfare – have gone through a period of analysis and joint development in different local realities within 15 EU member states, Morocco and Russia.

### THE STRATEGIC FRAMEWORK FOR THE DESEO PROJECT: REVES

Since several years, REVES has been developing a multi-disciplinary partnership-based approach for local policy planning and evaluation. This was done by extending the concept of Corporate Social Responsibility of enterprises to a wider concept involving all key actors on a given territory: Territorial Social Responsibility (TSR®). TSR® has been and still is being further elaborated in the framework of various projects and other activities. Its principles correspond with common objectives of the "European strategy against poverty and social exclusion" such as the mobilisation of all relevant bodies, subsidiary and the application of a multidimensional approach to foster

social inclusion. REVES activities are closely linked to European Union policies, on the one hand, and to processes of local development, on the other. As a relay between different territories as well as between territories and the EU, the network represents a unique laboratory for socio-economic innovation.

DESEO has been developed by the REVES network in the framework of its strategy for social inclusion and anti-discrimination. Most project partners are REVES members.

With 82 members on 50 territories in 15 European countries, REVES serves as a large test-bed for DESEO project results and ensures their wide dissemination. Its charter clearly states as one of the network's major objectives "to *apply* gender equality". The network already carried out different project linked to local development and the role of gender equality (business creation by women, improvement of communication/PR activities of public bodies and social economy etc.). Its members – local authorities and social economy – are able to provide valuable expertise in the field of local development, gender equality, CSR/TSR, territorial cooperation and related issues.

In most of the aforementioned initiatives, social economy operators are at the same time target group (as employers) and final beneficiaries (as member/employee of their organisation). They are best placed to analyse needs and potentials as well as to experiment new models of cooperation and participation. In addition, they are in a position to directly monitor the impact of different actions related to the implementation of those models. Finally, it seems worth highlighting that a large part of social economy members and employees are women.

## DESEO – THE PROJECT

The European Council, during the Lisbon summit in 2000, clearly stressed the importance "to further all aspects of equal opportunities in employment policies". With respect to the objectives of the "Programme relating to the Community framework strategy on gender equality", it also expressed the intention "to improve the understanding of issues related to gender equality...".

An important instrument able to link economic development and gender equality, however, seems to be insufficiently explored so far: Within strategies aimed to foster local development and economic growth, clustering plays an increasingly important role. The exchange of skills and knowledge, common management processes and a shar-

ing of resources between different companies and other structures proves to be a successful concept. Nevertheless, clusters do not only have the potential to establish a fruitful, *growth-oriented* co-operation. They may also contribute significantly to social inclusion processes at local level, create links between persons and counteract stereotypes.

Equal access of women and men to economic and social life has to be recognized as intrinsic element of innovative processes fostering local development, including economic growth. Up until today, aspects such as the promotion of gender equality and equal opportunities in general *through the creation of clusters* have been fairly neglected.

Actors such as social economy and local authorities could fully tap cluster potentials and add new value and contents such as gender equality to a concept which is still very much based on competition.

The project "DESEO – Development of districts of equal opportunities in social economy territories" analyses existing experiences and potentials for a system of local (social economy) clustering that gears towards improved mechanisms for an equal participation of women and men in economic and social life. Experiences of both local authorities and social economy operators are brought together. New methods of collaboration between social economy actors and/or between social economy actors and local/regional authorities will be conceived.

These activities led to a first conception of future local clusters, which included elements such as

- a. Methods for the development of instruments that would help establish clustering activities between different social economy organisations or within partnerships between social economy and local/regional authorities;
- b. The improvement of services/structures of already existing clusters;
- c. Criteria of local financing to support the above mentioned clusters;
- d. Methods for a local valorization of cluster experiences;
- e. Elements for the evaluation of the performance of clusters fostering gender equality.

On one hand, this process allowed for an improvement of *existing* instruments such as childcare, training or flexible timing systems. On the other hand, partners worked on the development of new tools (conception of new transport services and specific training modules applied after parental leave, creation of common systems of management support, development of new systems of business support to women linked to instruments such as microfinance etc.).

The following partners contributed to the project activities:

- Provincial Administration of Piacenza (IT)
- CE.SVI.P. (IT)
- Ethos (Social Cooperative) (IT)
- City of Modena (IT)
- Lega Provinciale Cooperative e Mutue Modena (IT)
- City of Messina (IT)
- Piattaforma per l'Economia Sociale dell'Area dello Stretto (IT)
- City of Grenoble (FR)
- Centre d'Information des Droits des Femmes de l'Isère (CIDF) (FR)
- City of Dunkerque (FR)
- ADELIE (FR)
- Carbery Housing Association (IR)
- West Cork Leader Co-operative Society Ltd. (IR)
- Cork County Development Board (IR)
- Coompanion (SE)
- CEPS (ES)

#### FOCUS THEMES AND METHODOLOGY OF THE DESEO PROJECT

DESEO aimed to establish economically *sustainable* clusters which foster different dimensions of gender equal-

ity in particular and equal opportunities in general. Partners therefore *built on existing and available resources instead of identifying and launching entirely new projects which would most probably also necessitate new means.*

At local level, the DESEO project brought together social economy resources for equal opportunities within the following priority fields:

1. Awareness-raising and information regarding equal opportunities and anti-discrimination, Implementation of relevant legislation
2. Appropriate instruments fostering work-life balance and parental leave, including subjects such as transport
3. Appropriate instruments promoting training/entrepreneurship, including access to financing

Due to the complex issue and the fairly unusual combination of a hitherto rather economic concept with an equal opportunities perspective, the project required a clear structure and procedure. It was implemented in the following phases:

Phase I: Definition of the problems and needs on each partner terri-

tory: What is the problem? What kind of cluster could be established – which specific objective should it have? What elements of cooperation should be improved (in case clusters already exist)?

Phase II: Mapping *existing* resources: Which resources are necessary and available?

Phase III: Finding methods to mutualise resources: How to mutualise available resources?

Phase IV: What is the added value of the clusters to be created on each territory?

Phase V: Test

In the end of the project, DESEO partners developed recommendations, including some guidelines for the set-up of successful cluster activities for equal opportunities and the implication of local authorities.

**This publication should enable readers to reconstruct the DESEO process and draw his/her own conclusions on the transferability of the models developed on his/her territory. After some theoretical considerations on clustering with a gender perspective in chapter 2, chapter 3 provides a first definition of a DESEO cluster, including minimum standards for its establishment and functioning.**

**However, it should be kept in mind that, so far, clusters or similar structures which subordinate their operations a clear gender perspective hardly exist. Chapter 4 will therefore present some good practice examples relating to the mutualisation of local resources with more general social objectives.**

**In chapter 5, the aforementioned definition and examples will then be confronted with networks and other structures promoting different dimensions of equal opportunities: What makes them being different from clusters?**

**Chapter 6 will propose planning and evaluation tools for local clusters promoting equal opportunities.**

**An outline and evaluation of local cluster designs and experimentation activities developed by the different project partners follows in chapter 7.**

**The aforementioned local tests finally represent the basis for European minimum standards and principles regarding the development of clusters for equal opportunities as well as for some general recommendations to national governments and the European level. These will conclude this publication in chapter 8.**

## THEORETICAL BACKGROUND

### ADDING VALUE TO AN INNOVATIVE ECONOMIC CONCEPT

#### CLUSTERS: INTEGRATING EQUAL OPPORTUNITIES AND THE GENDER PERSPECTIVE

According to REVES experiences regarding the construction of local partnerships, it seems evident that sustainable cluster processes should

not be initiated or established by political decision-makers only, but also by initiative and with the participation of various local stakeholders. Yet, it seems crucial that there be a firm support for the development of clusters in the territory through an adaptation of legislation as well as through positive attitudes towards entrepreneurship and the benefits of social integration.

In contrast to the USA, SME's and individual actors in Europe are included in the cluster processes to a larger extent. Robert Putnam's and Richard Normann's models add elements to Michael Porters diamante scheme: Profitability is complemented by social or individual benefit. Social capital plays a vital role.<sup>1</sup>

Key factors of success for clustering may be:

- creation of clusters in new business areas (responding to specific needs);
- specific territorial knowledge and competences that are used intelligently during planning and realization of clustering processes;
- entrepreneurs having enough freedom to develop successful market ideas in a cluster;

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<sup>1</sup> See, for instance: Richard Normann (2000): "Service management"; Robert Putnam (1988): "Hanging together"; Robert Putnam (2004): "Democracies in flux"

- integration of clustering as an engine for socio-economic development in local long-term strategies and policies;
- creation of territorial advantages through synergies between different clusters in a region or
- cooperation between enterprises, society and universities in new innovative areas (triple helix).

The above-mentioned factors may apply to all sorts of clusters. Other elements that should be taken into account are size (variable), structure (vertical/horizontal), technology and knowledge level, location(s) and rooting on the territory, territorial infrastructure, elements ensuring sustainability. Closely related to these elements is finally the way equal opportunities and other social aspects are developed.

Clusters generate growth through innovative links and synergies between enterprises and other local actors. Yet, there is no “wonder recipe” for the establishment of clusters (be they traditional or “DESEO clusters”). No guides exist that describe how to best establish these links and relationships in order to achieve economic progress *and* social cohesion in a specific geographical area. Experimentation is or, at least, *should* therefore always be a part of the process.

A positive dimension of the cluster phenomenon lies in the fact that structures are set-up on the basis of principles and methods that are different from traditional competitive business patterns. The connection between businesses that normally are not associated to each other may entail the emergence of innovative areas and potentials of growth. It therefore seems to be worth to also explore possibilities to foster equal opportunities within such clustering processes.

To conclude, it seems obvious that in all areas of clustering and cluster support creativity is necessary when it comes to decisions as to where (territorial or/and business area) and by which activities and means a cluster is established. Creativity and courage for innovation is required even more if clustering includes a specific gender perspective.

To date, the value of clusters in promoting not only economic growth, but also aspects of social inclusion such as equal opportunities has been fairly under-estimated.

CLUSTERING EQUAL OPPORTUNITIES  
POTENTIALS OF SOCIAL ECONOMY  
AND LOCAL AUTHORITIES

However, as has already been stressed, clusters represent ideal places not only for economic co-operation, but also for the creation of common tools allowing for a better participation of both women and men in economic and social development at local level. Designed in a specific way, clusters might foster at the same time innovation, business activities, social life and civic engagement.

Social economy and local authorities are, by their very nature, in a position to use and experiment such potential. In proving the success of new cluster methods they could add value to the notions of Corporate Social Responsibility/Territorial Social Responsibility (TSR®), wherein the aspect of "gender equality" has not yet been fully developed.

On the other hand, social economy structures are also most concerned by the issue as a high number of employees and managers within social economy are women.

Through the creation of a specific kind of cluster – serving their own purposes and/or the local environment – social economy operators could promote the participation of women and men in social and economic life, business creation, work-life balance, the well-being of their employees and thereby, not at least, their own economic performance. Enterprises that (temporarily) lack resources in terms of financing, management capacities or locations might profit from common structures and contribute with their knowledge, training competencies etc. Social economy may set an example by creating structures helping to strike the balance between economic and social aspects of local development. Herein, gender should be seen as an opportunity rather than an obstacle.

This would also draw the public's attention to the fact that gender equality is a crucial element in each dimension of social and economic life rather than an isolated aspect.

Complementing the notion of a "traditional cluster", a DESEO social economy cluster has been defined as follows: "*... a group of social economy enterprises operating on the basis of mutualised resources and services, a spill-over of skills/competences and knowledge as well as common management systems. Activities are founded on collaboration and the shared and overarching objective of all actors to promote gender equality as a major element of innovation, solidarity, participation and local development in general.*"

With local authorities getting involved *into* or supporting cluster activities under the same objectives, a social economy cluster might become a territorial structure.

Here, it should be stressed that partner structures of these clusters do not necessarily have to be physically located at the same place or in the closest neighbourhood, even though they will all be part of the same city or region.

Local authorities may thus capitalize on cluster processes promoting gender equality. By lending support and getting involved in different ways, they would be provided with opportunities to improve, decentralize and create services facilitating the access of women and men to the labour market, to social life etc. For this to be realized, though, they need to work on new patterns of support and public-private co-operation. The legal and financial framework has to be adapted.

However, it also has to be taken into consideration that cluster establishment entails risks. Often, it leads to or may be slowed down by long bureaucratic procedures. Moreover, the objective has to be clear and common to all partners. Finally, strong willingness of cooperation and burden-sharing by all actors is a pre-condition for success.

DESEO aimed to analyze these challenges and existing obstacles. With the establishment of joint minimum standards for cluster creation as well as with their experimentation activities, partners have been searching for solutions to overcome the aforementioned problems. These aspects will be treated more in detail in the following chapters.

*In conclusion it should be stressed that, in the framework of the DESEO project, clustering will be defined in the largest possible sense. Different forms and types of clusters may be created. Moreover, they might have different kind of specific objectives related to different aspects of equal opportunities, i.e. employment and entrepreneurship, training, work-life balance etc.*

### **Example 1 – Promoting equal access to work: Entrepreneurship and Employment**

An important incentive of including the gender perspective in clustering processes is to make a city or region able to tap on potentials of growth created by (new) entrepreneurship of both women and men. The gender perspective, however, is often absent in research and policy development regarding enterprise and cluster creation. Conventional business support is often channeled into businesses and sectors dominated by men.

Promoting entrepreneurship as an important element of equal oppor-

tunities means to build on various complementary skills and capacities of different individuals. Such behaviour may generate positive results, if women and men are given sufficient opportunities to launch and conduct business the way they have chosen themselves, maybe together with colleagues and associates.

For this to happen, they might work in clusters themselves or be backed by cluster structures of other local stakeholders (which have a strong interest in developing local entrepreneurship, employment and social cohesion).

Cooperation in clusters might offer various elements of support to entrepreneurship for both women and men. Advantages range from exchange of know-how, joint use of infrastructure and even human resources to common guarantee funds for an improved access to credit, common services tailor-made to the needs of entrepreneurs and employees, to name just a few.

Local authorities, social economy, private structures providing support to future entrepreneurs, associations working in the field of equal opportunities, social economy structures and universities may increase the efficiency *of* and access *to* their services for the specific target groups by joining forces and sharing resources for business support on a long-term basis.

It seems obvious that cluster structures promoting entrepreneurship will support most probably at the same time the creation of working places.

Under specific conditions, clusters might also secure working places by jointly financing a certain number of employees. These employees would then circulate, *as far as appropriate*, within the different structures belonging to the cluster according to the (changing) needs of the latter.

Here, however, strong convictions and a firm political willingness are crucial. They will emerge if different local stakeholders and politicians recognize that clustering may significantly contribute to the reduction of costs of unemployment, social exclusion and economic backwardness which the whole local community would have to bear.

### **Example 2 – Promoting equal access to work: Training**

Also, clusters – set up to this specific purpose or not – might conceive specific training modules for their current or future employees. This might happen in cooperation with other local or regional stakeholders. There is, for instance, a strong need for seminars fostering management skills particularly of women or “refreshment courses” for

women and men returning from parental leave. According to specific needs of the employee, time aspects, the area of the respective entrepreneurial activity and availability of employees and trainers, different forms of training (including online-courses and assistance by a mentor which might be an employee of a cluster enterprise himself/herself) could be developed. The realization of cluster activities in this field depends, of course, to large extent also on the domains in which different enterprises of a cluster operate. Joint training courses on management, for instance, might be easier to conceive than training for employees returning at a specific moment from parental leave to a very specific field of activity.

### **Example 3 – Promoting work-life balance**

The difficulties of work-life balance originate in the fact that changes in some areas of life have not been matched by change in other areas. Peter McDonald<sup>2</sup> held that fertility is particularly low in societies where women have equal opportunities in education and work, but where they carry an undue proportion of family work. Livia Olah<sup>3</sup> found that women in Sweden are more likely to have a second child when their husband takes parental leave after the first birth.

Even though there seems to be a change towards more symmetry in the division of work, other changes are necessary that would ensure better burden-sharing within the family and among members of the local community as such, thereby fostering equal participation of citizens in society and economy.

Clusters do not only have the potential to promote entrepreneurship and employment of women and men, but also to create instruments allowing for a better reconciliation of work and private life, including civic engagement.

Services such as transport and childcare, conceived and shared by several enterprises, might be created and adapted to the specific needs of *male and female* employees. Local authorities and other service providers might be willing to join initiatives alike, as they could, for instance, at least partially help solving problems related to a lack of appropriate public services.

Another important aspect here is flexibility in terms of working hours. The CARE project<sup>4</sup> outlined possibilities of a new system or working

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2 Peter McDonald (2000): "Gender Equality, social institutions".

3 Livia Olah (2003): "Gender fertility: second birth in Sweden and Hungary".

4 See: [www.reves-portrayal.net](http://www.reves-portrayal.net); REVES: "A guide for a local strategic approach to the reconciliation of work, family and public life" (2007).

time agreements “à la carte”. By taking better consideration of capacities, availability and needs of different groups of employees *and* respecting requirements of the employer, they might render an enterprise even more efficient. Clusters are in a position to experiment such a system and profit from it even more than single enterprises, particularly if they operate in similar areas and could thus easily interchange human resources.

Other measures targeting work-life balance of employees might also include leisure activities for employees (and their families). Jointly used locations, to name just one example, could be placed at the disposal of the whole cluster.

Social economy enterprises are particularly well positioned to experiment such cluster activities, as the underlying principles of their work practice – such as cooperation, solidarity and non-sharing of profit – already pave the way for alike forms of collaboration.

## WORKING DEFINITION OF A DESEO CLUSTER

Even though DESEO defined clustering for equal opportunities in the largest possible sense, all different kind of clusters have several characteristics in common. In the first phases of the project, DESEO partners conceived a more detailed working definition and common standards that should be respected while setting up cluster structures in different fields:

### **With regard to their objectives, social economy clusters fostering equal opportunities:**

- a. are based on common objectives *linking the economic and social dimension (as well as environmental and cultural aspects)* and, more specifically:
- b. develop and promote *social economy structures as an instrument for equal access* of women and men to work, family, public and personal life (pro-active approach towards gender equality and equal opportunities in general);
- c. foster *equal access of women and men to quality services* (including finance/credit, employment etc.);
- d. lead to the *creation and maintenance of jointly-used instruments (structures, services etc.) in the medium and long term;*

### **Concerning their establishment and resources, social economy clusters fostering equal opportunities:**

- e. are established *at local and regional level* (in a geographical area limited in size);
- f. are based on *shared resources* (locations, human resources, financing, equipment, expertise...) and therefore found on a

- thorough mapping of (available/potentially available) resources and an analysis of competences of each of the potential partners (transfer and mutualisation also of expertise!);*
- g. *are developed in the framework of a jointly elaborated long-term strategy for local development/equal opportunities and anti-discrimination;*
  - h. *require the permanent support and contribution of all partners in terms of resources and concrete participation in all actions/operations as jointly defined by the long-term strategy (no punctual activities or commitment "à la carte" as it is often the case for networks);*
  - i. *are self-sustainable, i.e. rather independent from ad-hoc external financing (incl. ad-hoc public financing), unless the latter represents mid- or long-term structural financing (such as it derives, for instance, from the LEADER programme);*

**In terms of governance and relationships among the partners, social economy clusters fostering equal opportunities:**

- j. *require an equal footing of all partners, joint responsibilities and participative decision-making processes (reciprocity/equality within the cluster):*
  - *diverse contributions of different partners should be equally recognized*
  - *initiatives that touch on the activities of the cluster are taken after discussion and decision by all partners;*
- k. *have to ensure a mutual recognition of competences so as to valorize the partnership and the role of each partner;*
- l. *might necessitate animators/intermediaries to ease processes of negotiation between the partners, particularly in the initial phase: these animators might be external persons or representatives of partner structures – their role and competences have to be accepted by all partners;*
- m. *necessitate well-elaborated communication strategies among all partners;*

**With regard to local co-operation, social economy clusters fostering equal opportunities:**

- n. *ideally have among their partners or promoters local authorities which could profit of cluster activities to improve/decentralize/create local services and link cluster activities and related local cooperation to their policies and strategies:*
  - *such co-operation, however, necessitates time and space to find a methodology for joint work which would take into*

account specificities and mutual expectations of both partners (social economy and local authority)

- local authorities are in a position to adapt legal and financial frameworks for new patterns of local collaboration such as clusters

Attention: Also in this case, cooperation is based on an equal footing and reciprocity of both partners, a *mutualisation of resources* and *not* on unfair competition, mere subsidy-logics or domination of one partner (decisions are taken jointly)!!

- o. might be based on *co-operation between a limited number of partners in the initial phase*, but:
- p. may *open up for collaboration with other local stakeholders* once the cluster structures are established and stable;
- q. have an incubator function in the sense that cluster activities may lead to the identification of other future initiatives on which the partners could work inside or outside the cluster structures (opportunity to consolidate relationships among local partners)

Finally, it should be stressed that social economy clusters fostering equal opportunities are not a pure instrument of public relations and marketing.

So far, cluster-type instruments to promote equal opportunities – realized with resources that are shared between different social economy enterprises – hardly exist. It becomes even more difficult to find local authorities involved in such activities, i.e. a cooperation between social economy and local authorities that goes beyond a mere support through subsidies, public contracts or specific programmes that are often limited in time.

## EXAMPLES FOR PROCESSES OF MUTUALISATION AND CLUSTERING ON A TERRITORY

The following good practice examples, identified in the beginning of project activities, are not directly related to gender equality. However, regarding all other aspects they come close to what has been conceived as a DESEO cluster (see the aforementioned criteria) and might provide first ideas regarding structures, contributions, methodology etc.

### TERRITORIAL PACTS

#### **Territorial pacts – Characteristics**

Territorial pacts for employment were promoted by the European Commission since the European Council in Florence (1993). In this context, the Commission laid specific emphasis on assistance to cities and rural areas facing serious problem unemployment. In the framework of already existing programmes and initiatives such as Structural Funds/URBAN etc., selected territories received technical and financial support.

Approximately 80 Territorial Pacts have been co-funded by the European Commission. All of them obliged regions and cities to define more concrete and participative partnership-based strategies and to adopt a more responsible stance regarding decisions taken. Today, territorial pacts no longer exist. Several successful local partnerships and their initiatives, however, have been fully integrated into the Structural Fund programmes.

Partnership in a territorial pact was composed of public authorities,

associations, social partners and professionals. All partners had to carry out a joint diagnosis of the local situation and specific problems, thereby integrating, as far as possible, perspectives, opinions and concerns of each local player concerned by these problems. The partnership then had to table a joint proposal for a) a long-term strategy and concrete actions (including new initiatives as well as actions to coordinate already existing initiatives), b) the mobilisation and (re-)allocation of all available resources and c) the (re-) allocation of related tasks and responsibilities.

Territorial pacts went beyond collaboration such as in the framework of the follow-up committees of the Structural Funds. They were very much characterized by a bottom-up approach and an enlarged partnership allowing different local partners to co-construct measures and coordinate different actions without being extensively dominated by local administration. It should be stressed that, beside planning and implementing some new initiatives, the pacts very much focused on a better coordination of already existing measures.

With the territorial pacts a new kind of partnership was created which differed from traditional and often short-term public-private partnerships and their competitive approach. Most of the territorial pacts showed a great potential for innovation. They encouraged a new kind of local collaboration, new dynamics, greater efficiency of local services and policies through re-allocation of responsibilities and resources and even new patterns of local governance.

## **Territorial pacts – Examples**

### *Territorial Pact for Employment, Brussels-Capital region (B)*

The territorial pact for employment in Brussels-capital region consisted – and still consists! – of the following partners:

- Ministry for Economy and Ministry for Employment of the Brussels-Capital Region
- Economic and Social Council (with the social partners)
- Regional Secretariat for Urban Development
- Brussels French-Speaking Institute for Training
- Flemish Service for Job Placement and Vocational Training
- Institute for Life-Long-Learning of the Middle Classes and SME
- Flemish Institute for Self-Employment and Entrepreneurship
- Office for the Promotion of Tourism
- Brussels Harbour

- Téléport
- Regional Society for Investment, Brussels
- Society for Regional Development, Brussels
- Regional Office for Employment, Brussels (ORBEM)

Other local actors from the private sector, associations, university and other structures were involved for single activities regarding specific issues and domains. However, these structures or experts were not part of the General Assembly.

The pact was coordinated by the general director of ORBEM.

Staff costs and general costs for coordination, budget for studies, communication, dissemination of information and publicity of the pact was financed by the EC whilst the other costs are taken in charge internally by the participating partners.

Priorities, strategy and actions of the partnership were discussed jointly within the General Assembly and developed within different working groups. All working groups had a "pilot" in charge of organising meetings, reporting on WG activities during the plenary as well as inviting external experts. Items discussed during WG meetings included a) concrete elements of each measure (details), b) division of tasks between different partners, c) definition of competences, d) establishment of a calendar for each stage of the implementation, e) estimation of costs and, if necessary, f) possibilities for additional fund-raising. However, final decisions are taken in plenary by all partners.

One main axis of the territorial pact of the Brussels-Capital regions was to stimulate entrepreneurship (particularly among young people) within the local and social economy. In this context, "Centres d'Entreprises" were established. These structures work as an interface between entrepreneur and divers other organisations. They provide administrative support, consulting regarding management, training, phone permanencies and infrastructure such as meeting rooms or IT.

Activities also resulted in the creation of a "Brussels Enterprise Agency", which provides guidance and support to both traditional enterprises and social economy. It was set up and co-financed by the SDRB (Société de Développement pour la region Bruxelles-Capitale), SIRDB, the Centres d'Entreprises and relevant ministries of the Brussels-Capital region. These actors also contributed with human resources/working time to the preparation of the establishment of the agency.

In the field of social economy, three main actions had been envisaged:

1. the draft of a decree for the recognition of the social economy sector as such and its support by the regional government (a major condition also for the social economy of the Brussels-Capital region to have access to national programmes of support),
2. the promotion and adoption of measures of support for the social economy, particularly regarding social integration enterprises, and, in this context:
3. the conception of specific training modules for managers of social economy structures.

Most of the objectives have been achieved. In 2004, a decree regarding the support of the social economy sector has been issued by the regional government.

The development of training schemes for managers of social economy enterprises is still ongoing and has been taken up in the new pact 2007-2013. However, the latter does not foresee anymore any specific working group on social economy: In 2004, a platform for social economy, bringing together public and private actors (social economy) has been created. It will carry on activities launched with the pact.

After two periods of direct co-financing of the Territorial Pact for Employment by the European Commission, the Territorial Pact of the Brussels-Capital will be carried on, in the period of 2007-2013, at local level. This opens up new room for manoeuvre in local programming processes. Actions will be co-financed by the Brussels-Capital region, private and public local stakeholders (most and foremost the partners), with some financing deriving from the Structural Funds (Objective 3).

In May 2007, new modes of functioning, priorities and domains of action have been (re-)defined jointly by the partners and other interested stakeholders and key persons. The new programme will be finalised and adopted in June 2007 the plenary of the pact.

*Brussels Territorial Pact: Concerted actions against discrimination on the labour market*

While searching for innovative models regarding the mutualisation of resources, it appears worth having a closer look at the actions initiated by the Brussels Territorial Pact and its transversal working group for anti-discrimination on the labour market. In our view, these initiatives might already give a valuable example for a model of innovative

clustering between different actors on a territory. Anti-discrimination obviously includes all aspects related to gender equality.

In June 2001, the Council of the Brussels-Capital region (now the Parliament) called upon a broad range of local stakeholders to join forces and fight against political, social and economic aspects of discrimination on the labour market. After a number of hearings and debates, several initiatives emerged.

Amongst other initiatives, it was decided to strengthen actions carried out by the ORBEM (Office Régional Bruxellois de l'Emploi) in context of the anti-discrimination measures of the Territorial Pact for Employment. This was done, most and foremost, in cooperation with the Centre for Equal Opportunities and Fight against Racism which was in a position to provide strong expertise related to legal, economic and other dimensions of discrimination. Other private and public stakeholders, including associations, as well as trade unions joint the activities.

After negotiations and strong lobbying activities by the social partners, the government of the Brussels-Capital region had already created a specific budget line for actions against discrimination. In a unique and probably up until today exceptional decision, the management of this budget line and related actions was finally conferred to the partners of the anti-discrimination working group of the Territorial Pact for Employment.

The initiatives launched aimed to establish above all a specific structure of support and consultation for victims of discrimination on the labour market. The stakeholders jointly agreed on the fact that this desk should be located in closest proximity to the employment desk, i.e. within the ORBEM. It should be noted that the latter is generally in charge of administration and implementation of all activities promoted by the pact and its working groups. However, the ORBEM does not take any initiative on its own. At least three different stakeholders have to support and approve a specific action (including, for instance, dissemination and publication of results) before it is realised. Bilateral partnerships are not possible.

This desk as well as the employment of three consultants for diversity by the Brussels-Capital region were in the first place financed through the above mentioned budget line. However, the set-up of the desk, its maintenance as well as the creation of the job profile and conception of pedagogic instruments of the consultants made necessary and still require a considerable contribution of expertise and working time from the part of the non-profit partners and trade

unions, which put their human resources, venues and material at the partnership's disposal.

In relation to the aforementioned initiatives, other actions such as the organisation of seminars, the development of a "Framework for diversity plans" of private and public actors", the conception of training modules for future diversity managers of the public sectors, pilot projects (example: integration of members of the sub-Saharan community into the labour market, specifically through social economy structures) awareness-raising campaigns (information brochures for new employees or immigrants) were carried out. All of them could be realised not only thanks to the financing delivered by the budget line for anti-discrimination, but also due to the contributions of the different partners. The seminars, for instance, addressed employers and employees of specific branches of enterprises such as gastronomy, metal and chemistry or banking and insurances. They were organised not at least on the basis of a co-funding of regional/local enterprises working in these sectors, the provision, by these enterprises and other partners, of venues, catering and not at least human resources for the preparation of the training modules.

Three stakeholders and members of the pact (among them the Centre for Equal Opportunities and fight against Racism) decided to start working on the creation of a specific database which would support the activities of the anti-discrimination desk and give employers, employees and job seekers access to information on different aspects of discrimination, including preventive measures and possibilities of support for victims. Again, resources are based on the budget line as well as on contributions of the partners in terms of human resources, know-how and expertise.

*It seems crucial to underline that all these actions are part of a long-term strategy promoted by a local/regional partnership of public and private stakeholders. They cannot be considered mere punctual and short-term initiatives. For this reason, the territorial pact of the Brussels-capital region and particularly its working group on anti-discrimination might be considered a valuable model for proper and innovative clustering activities at local and regional level.*

The strengths of the partnership lie a) in the strong willingness of all partners to work in a proper partnership including co-decision and joint management, b) in the joint identification of common objectives, c) in a partnership of a "reasonable" size (to be operational the number of partners has to be kept limited, with a larger number of stakeholders being associated to specific actions) and not at least d) in the strong mediation and negotiation capacities of the animator of the pact which counteract long and tiring processes of search for consensus.

In the opinion of Marc Trullemans, coordinator of the Territorial Pact, the openness and capacities for collaboration of the different stakeholders might also be related to their being familiar with the already fairly complex governance structures at national and regional level in Belgium. Processes of co-planning and co-decision – the introduction of which might take some time on other territories (in other countries) – very rapidly resulted in first actions.

#### *Territorial pact Caltanissetta (IT)*

The Territorial Agreement of Caltanissetta is one of the first examples of coordinated activities between the public and private structures of a territory. The pact was established in 1997, on the initiative of the association of enterprise managers (COOs). It started with cooperation between the latter and trade unions. However, soon local public authorities joined the partnership, which introduced a new model of industrial relations with the specific objective to promote employment and entrepreneurship.

The partnership consisted of:

- Local authorities
- Small and medium enterprises (traditional and social economy)
- Trade unions and employer's organisations
- Credit institute (Cofidi)
- Training institutes
- Association of entrepreneurs and craftsmen
- Federations of professions
- Consortiums

The major aims of the pact were a) to better integrate and promote SMEs through training, targeted investment and other instruments, b) to develop tourism and c) to foster innovative agricultural and industrial activities.

For the implementation of the pact, a non-profit consortium, the "Società Consortile per Azioni", was created.

The partnership involved in the pact provided consultancy regarding organisation and management, promotion of produce and export, technical innovation as well as financing to small and medium enterprises.

Partners contribute to the actions with different means:

The association of enterprise managers and COOs (Assindustria) engaged in the implementation of several training projects and initiatives for employees, thereby promoting the participation of industrial entrepreneurs and craftsmen willing to invest in new initiatives.

In this context, Cofidi, a credit institute for co-operatives and a partner of the pact, anticipated or took over financing for certain investments. Other credit institutes made similar contributions. Local and regional authorities committed to accelerate and ease, in the limits of the law, administrative procedures.

Responsibility of the partner Consortium A.S.I. was to render the pact and its regulatory plan operational as well as to carry out promotional activities targeting the Region of Sicily. Trade unions sought to create a favourable framework for actions regarding social dialogue as well as measures fostering flexibility.

Beneficiaries of the pact, i.e. single enterprises, finally, engaged in implementing the investment programmes fixed in framework of the pact and programme, thereby fulfilling all obligations such as the employment of the foreseen number of workers and co-financing of the measures.

All signatories of the pact contributed thus with their competences, finance, technical and human resources.

Additional financial resources were raised through European, national, regional and local programmes and funds.

Decisions were taken within the Società Consortile per Azioni. A "mixed group of animation, monitoring and control of local development" was created – a sort of steering committee, in the framework of which the signatories of the pact discussed, adopted and monitored priorities and concrete actions. If necessary, specific working groups on different issues were established.

The practical implementation of actions were the task of their respective promoters.

Another form of collaboration and cluster-type mutualisation of resources, which might bring together social economy, local authorities and other local players, are consortia.

CONSORTIUM

### **Consortium – Characteristics**

A Consortium could be described as a group of organisations that come together to pursue a joint (long-term) objective or a project which requires (structural) co-operation and the sharing of resources. Its most advanced and institutionalized form is the institute.

Generally speaking, the aim is to deliver “more than the sum of the individual parts”. Consortia usually develop out of existing working partnerships. Partners need to have a clear common goal in order to ensure the success of their joint undertakings.

Consortia emerge most often in the non-profit sector. In a consortium each member keeps its own legal status. The consortium’s competences and control refer only to activities linked to the common purpose. Partnership is based on a contract in which rights and obligations of each member are clearly defined.

### **Consortium – Examples**

#### *Birmingham Social Economy Consortium (UK)*

The objective of the Birmingham Social Economy Consortium is to promote Social Economy activities in all fields of the society.

Birmingham Social Economy Consortium consists of following members:

- Local authority: Birmingham City Council
- Social economy operators/community organisations: Business in the Community, Colebridge Trust, Co-Enterprise Birmingham, Birmingham Voluntary Service Council
- Banking sector: Bank of Scotland Community Banking, Birmingham Credit Union, Development Agency
- Church: Diocese of Birmingham
- Training and education structures: Aston School for Social Entrepreneurs

The Birmingham Social Economy Consortium provides support in market and feasibility research, business advice, training, access to finance as well as development.

#### *GESCO – Social cooperatives Consortium (IT)*

GESCO was set up in 1991. It is made up of social co-operatives working particularly in the field of care for elderly, disabled, specific groups of immigrants and other disadvantaged members of society. Moreover, GESCO collaborates closely with public authorities.

GESCO’s activities focus mainly on the coordination of local services, service planning and other interventions at local level. It manages daily care centres and residential centres, administrative and information desks, street activities. Moreover, GESCO organises training

activities for associates and employees as well as awareness-raising campaigns among the local population. The consortium also promotes the development of cooperation with other local players. Furthermore, it carries out research regarding opportunities for employment creation and (economic) development. Finally, GESCO delivers services for the creation and support of non-profit enterprises. All activities are based on fixed guidelines and rules. The consortium is active on the whole territory. Due to an increase in sales, it was able to employ a higher number of employees and to restructure its organisation and management system.

Main objectives of the consortium are the joint realisation of different projects, the promotion of the members' activities and social economy in general, the promotion of territorial cooperation in the Campagna region as well as protection and strengthening of capacities to participate in public procurement procedures.

As has already been mentioned before, the consortium is only responsible regarding activities carried out in the framework of the common strategy. Their realisation is coordinated by different co-operatives in charge of specific actions, depending on their respective experience and competences. Assemblies, working group meetings, study groups, seminars, other kind of (public) meetings and conferences are organized in collaboration with different local stakeholders and citizens.

Despite a number of positive results, collaboration with public actors and private companies still remains rather difficult. Reasons may be found in tendencies of (public) control and supervision as well as to strongly competitive attitudes.

Yet, the consortium seeks to set different resources and local actors in relation with different expressions of demand, depending on the specific needs in diverse parts of the territory. Furthermore it promotes and is involved in a number of different networks (e.g. fight against social exclusion) as well as in cooperation with trade unions, universities, chambers of commerce and NGOs.

A new type of enterprise opening up new ways of collaboration between diverse public and private actors, emerged in France with the adoption of new legislation in 2001: An adaptation of the law on the statutes of co-operatives (adopted in

«SOCIÉTÉ COOPÉRATIVE  
D'INTÉRÊT COLLECTIF» (SCIC)

1947), Law 2001-624, contains a definition of the SCIC and various complements to existing legislation such as the Commercial Law. It was followed by Decree 2002-241, which specified the legal framework for SCIC approval procedures, conditions for the granting of subsidies and the co-operative review obligation.

### **SCICs – Characteristics**

SCICs are limited liability companies or joint-stock companies with a variable capital. They produce goods or services of general interest and aim to have a clear impact on social aspects of local development. SCICs are non-profit structures, which means that at least 57,5 % of their profit has to be allocated to the indivisible reserves. Their activities are governed, as already mentioned, by the above-mentioned law as well as by the Commercial law. SCICs operate in very different branches such as social services, catering, transport, creation of enterprises, promotion of social economy and fair trade

Any declared association may become a SCIC without changing its legal status.

SCICs are private initiatives and therefore autonomous. However, public bodies may conclude agreements with a SCIC, subsidize and/or collaborate in the framework of public tenders. Most important though, they may also join the partnership and hold a share. The latter, however, may not exceed 20% (shares of all public entities in total).

The main differences to traditional co-operatives are that third parties, i.e. non-members of the co-operative may join the activities. Moreover, at least three different categories of legal or natural persons have to be part of the membership, all of them bringing in different kind of experiences *with* and different relationships *to* the activity. Any private/public or natural person may be member. Moreover, a SCIC is obliged to include users (clients and beneficiaries) and employees of the co-operative in their membership.

In short, a SCIC is carrying out an economic activity in order to promote employment and to respond to specific needs of the territory, as defined by the different members.

Decisions are taken by the General Assembly. The principle "one man one vote" is applied and will also be maintained in case of college creation. Colleges may act as interface between individual members and the General Assembly (see example: SCIC LANDES).

## SCIC – Examples

### Theoretical example: Transformation of an association into a SCIC (France)

Since co-operatives of general interest emerged only recently, there is a lack of good validated examples. Therefore, a theoretical example of a SCIC will be given first.

An association providing childcare services may decide to create a SCIC by associating its employees, a public office and two enterprises which operate in the same neighbourhood with similar interests and objectives (linked to the general interest). As a consequence, it will subscribe all its property to the SCIC and receive, in turn, bonds. In case the association keeps its status for at least 5 years, its operations will not be taxed. Employees, parents, public offices and the two enterprises mentioned beforehand will contribute to the capital.

Major decisions would be taken by a General Assembly, where the association and each of the other three groups (employees, parents, public office&enterprises) would have one vote.

### SCIC Landes (Fr)

LANDES (Lancement d'Activités Nouvelles pour le Développement d'une Economie Sociale et Solidaires/Launch of New Activities for the Development of the Social and Solidarity-based Economy) is a coopérative d'activité, established in 2002. The main activities of SCIC Landes refer to guidance of future and new entrepreneurs. Moreover, the cooperative provides office locations for the latter.

SCIC Landes was established in the framework of an already very strong local culture of partnership, fostered, above all, by the Comité Bassin Emploi (CBE), du Seignanx. This regional association was founded in 1993 on the initiative of local authorities who wished to associate other local stakeholders in the discussion *on* and realisation of specific actions *for* local social and economic development.

The aims of the CBE are to:

- a. respond to social needs emerging on the territory – creation of new services and activities;
- b. creating opportunities for anybody willing to start his/her own enterprise/activity (in particular for young people) – assistance with the objective to integrate them and their activities in the labour market (the aim is *not* to keep them permanently in the SCIC Landes);

- c. jointly promote territorial development and provide an opportunity to young people to deliver their contributions herein;
- d. imply and ally different local actors on the territory (beneficiaries, associations, enterprises, local and regional authorities, volunteers) in order to respond to local needs and mobilise resources the best possible way;
- e. develop solidarity-based practices

The CBE is composed of four colleges:

- 1. Enterprises
- 2. Politicians
- 3. Trade unions (employees)
- 4. Local actors (associations, other structures working in social integration, local development structures and associations, training structures, insertion enterprises, structures promoting the creation of entrepreneurial activities etc.)

In the framework of its activities, different places and structures for local development have been created that allow to identify local needs, to plan activities and engage interested young people. Have been set up a local development Council, a Territorial Observatory and diverse venues where young people may express their views and ideas. In addition to this, a "project school" which conveys project management skills to young people and provides assistance in developing their entrepreneurial projects has been established (in relation with activities of the Local Development Council, Territorial Observatory).

SCIC LANDES, the creation of which also profited from the programme Interstices<sup>1</sup> for development and research, provides a test-bed for the entrepreneurial activities and projects of the young people. It allows, for example, to:

- a. establish an *enterprise* with a *final social objective*
- b. grant young people the status of an *entrepreneur*;
- c. have *mixed financing* (own resources and public subsidies)
- d. base activities on a democratic and participative approach
- e. have a *mixed membership* (employees, beneficiaries, volunteers, local and regional authorities, physical and legal persons)
- f. indivisibility of accumulated reserves

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<sup>1</sup> This programme for local development and research was set up in 1999 by UFJT (Union des Foyers et Services pour Jeunes Travailleurs – today 'UNHAJ – Union nationale pour l'habitat des Jeunes).

In most cases, members and associates of SCIC LANDES are partners of the CBE. Like the latter, the co-operative has thus four different categories of members:

1. Users/Beneficiaries = local actors (in this case: associations, other structures working in social integration, local development structures and associations, training structures, insertion enterprises, structures promoting the creation of entrepreneurial activities etc.
2. Public authorities and their federations: *Community of municipalities of Seignanx*
3. Enterprises (physical or legal persons representing economy such as enterprises, craftsmen, farmers...)
4. Project managers/entrepreneurs-employees: young persons from the territory

Among its activities figure, for instance, services offering mobility assistance, delivery free domicile of meals, organisation of tracking and other activities for different groups, associative bar and organisation of multi-cultural events as well as rent of vehicles.

The financing of the activities is based on the principle of mutualisation of resources and solidarity among members and associates: Insurances, services such as administration and bookkeeping, training and salaries are funded through the financial contributions of members/associates and, partially, by the profit generated by young entrepreneurs. A majority of the latter, however, is used to cover the costs for setting up the activities.

Moreover, SCIC LANDES profits from infrastructure (offices etc.) and services (administration, bookkeeping) established by other initiatives of the CBE such as the "pépinière entreprises" and the "hotel enterprises" (support structures for local and social economy providing technical assistance, affordable venues and other infrastructure etc.). Different local structures, including SCIC LANDES, share thus these resources.

Finally, members support the activities with their specific competences. Local authorities, for instance, provide institutional support and legitimisation. They play an active role in disseminating information on the services of SCIC LANDES among the local population. Enterprises operating in different fields, in turn, provide their expertise in the planning and implementation phase of diverse actions of the cooperative such as the holiday village for children etc.

SCIC LANDES is conducted as a not-for-profit association where associates/members do not receive shares. Associates/members

commit to accompany and assist the young entrepreneurs during the set-up of their activity with their respective competences; they commit to jointly search for the most appropriate solution to a specific need expressed (also with a view to promote social innovation).

*The promotion of equal opportunities and related issues such as women's entrepreneurship is part of the objectives of SCIC LANDES and all other structures set up by the CBE. One should keep in mind that the aim of the latter is not at least to develop long-term strategies for local development in general.*

### **Co-operatives of general interest – similar structures in other countries**

#### Belgium: Société à finalité sociale – Society with a social objective

Structures similar to a SCIC in Belgium are Societies with a social objective (Société à Finalité Sociale – SFS). The SFS are social economy initiatives operating in the field of integration of disadvantaged persons into the labour market as well as in the domain of community services (housing, care services for children and elderly, disabled). Even though Belgian law does not foresee any *specific* status for such companies, there is a possibility for each commercial society to insert in its statute a particular modality (law adopted on 13 July 1995). May become a «société à finalité sociale»: a) a société anonyme, b) a société à responsabilité limitée (limited liability companies) or c) co-operative society, provided that the following conditions are respected:

- a. associates should not seek for benefits (or only for limited benefits);
- b. the social objectives to which the activities are dedicated have to be clearly defined;
- c. the number of votes of a single associate is limited to 10% of the total

#### Spain: Mixed social integration co-operatives

Mixed social integration co-operatives in Spain are a special type of consumer co-operative or worker's co-operative. New legislation of 16 July 1999 (Art.106) enabled this type of co-operative to become active in the management of public social services as well as in the field of economic integration through work of socially excluded groups. Different kind of co-operatives and public bodies, foundations, trade unions and associations may set up a mixed social integration co-operative in order to jointly and on equal footing tackle

specific problems or needs for actions. Thereby, each associate or member keeps his or her autonomy and specific institutional features.

#### Great Britain: Community Interest Company

In Great Britain, the Community Interest Company is based on new legislation adopted in 2005, which added to the already existing company law framework. This legislation made the establishment of a company type in-between charity and traditional commercial company possible. In order to fulfil requirements, companies have to prove that profits and assets serve the public good. The composition of members and shareholders may include private players, social economy, local authorities and other local stakeholders.

The CIC is based on two principles

1. An annual report needs to be submitted to the Regulator of CICs with a view to prove the general interest-related objective and activities of the company (principle of the community interest test).
2. Profits and assets may not be distributed to members or investors, only to specific community interest companies or charities (principle of the assets lock).

May become a CIC:

a) private company limited by shares, b) a company limited by guarantee or c) a public limited company.

Registration is not possible in case of political campaigning or if the company delivers core public services (hospitals, education etc.).

The CIC is seen as a new basis for collaboration between social economy, SMEs as such and public authorities for different reasons: It is flexible in its form, i.e. different applications in the public and private sector are possible. Local authorities might get back to activities of CICs in the framework of public tenders or might set up a CIC themselves.

CICs may be set-up in the framework of a number of various initiatives local authorities are involved in, such as "local strategic partnerships, local area agreements, the transfer of publicly-held assets to community groups etc."<sup>2</sup>

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<sup>2</sup> Community Interest Companies: Information and Guidance Notes (2006): [www.cicregulator.gov.uk/guidance](http://www.cicregulator.gov.uk/guidance).

## EXISTING INITIATIVES PROMOTING EQUAL OPPORTUNITIES AND THEIR PATTERNS OF COOPERATION

A number of initiatives exist in the field of equal opportunities and their promotion.

Very few of them, however, are based on proper clustering processes (as defined on pages 19-21). They may be characterised above all as networking activities – a softer form of collaboration. Yet, this does not mean that networking is less important. It has to be considered a crucial basis, a means and a framework for clustering. Networking activities may thus lead to the creation of a cluster.

Subsequently, some examples for such initiatives will be given. The actions realised concern priorities of DESEO project partners and have been identified as interesting good practices. At the same time, differences between these activities and clustering will be highlighted to facilitate the understanding of the DESEO cluster definition.

### **Example 1**

In an English region an initiative has been created to assist local women in pursuing their personal goals and in actively participating in local economic life and society. A major aim is to provide networking opportunities among women. Activities include mentoring and one-to-one support regarding training, exchange of knowledge and expertise, integration into the labour market and entrepreneurship. All these activities aim to promote equality between women and men.

The 'parents' of this initiative define the latter as a *network* which carries out a wide range of different activities. Members, be they provid-

ers of information and training or beneficiaries, do not necessarily take part in all these activities, but chose those that are of most interest to them. Implication into the network's activities may thus differ in terms of quality and quantity (time, knowledge ...). Moreover, members may get involved more actively or withdraw from initiatives at different periods/moments in time. Finally, actions may concern different geographical areas and groups within the region. Also, some of these actions might have from the very beginning a limited duration.

All in all, the network follows more general objectives – activities are not necessarily subordinated to a specific local long-term strategy, A major aim is the dissemination of information and knowledge as well as networking.

Most of the criteria for clustering listed on pages 19-21 cannot be found in this example.

## **Example 2**

In another European region, an online community has been established. Founders and/or beneficiaries are women starting and developing businesses in this region. The online community has over 150 support organizations assisting women in identifying and elaborating their business ideas throughout the whole business lifecycle. The network activities are driven mainly by the following organizations:

- a structure specialized in the creation of networks and clusters; women's enterprise, science and technology,
- a specific enterprise training program,
- a university (managing programs linked to business start-up of women, with specific expertise in minority ethnic enterprise support),
- national organization specializing in supporting women in rural areas, supporting in particular new business ideas,
- an association helping disadvantaged women to set up their own enterprise,
- a business network with a 40% women membership,
- a national association for organizations and individuals concerned with supporting women's' enterprise.

Again, as indicated also in the title of the initiative, the above mentioned actions are clear networking activities, funded above all by the European Social Fund and the regional development agency. Describing its structure as "online-community", the initiative promotes exchange among single members and provides consultancy as

well as training on a variety of issues. It mutualises resources insofar as it pools knowledge and expertise. However, activities serve above all an overall objective rather than following a specific local long-term strategy tailored for a specific territory. Women in a geographically larger area are addressed – the online-community may extend to the whole country. Member's involvement may differ in terms of quantity, quality and time/duration.

### **Example 3**

With the support and coordination of the responsible ministry, a German region supported the establishment of a forum on women business start-ups. The initiative can be defined as an interregional network of intermediary organisations and individuals working with (future) women entrepreneurs.

The objectives of forum are the following:

- Raising awareness among decision-makers and experts: Specificities of women entrepreneurship are critically discussed in the network's meetings. Regional decision-makers and entrepreneurship experts are being made aware of gender aspects in entrepreneurship.
- Informing and learning about the specific situation of women entrepreneurs and available promotion: By sharing information within the network and hiring experts for specific topics, the network members can increase their knowledge about women entrepreneurship and its support.
- Lobbying: By involving politicians in the network and informing political decision makers, the network outlines the importance of women entrepreneurship towards policy.
- Development of new support activities: The network discusses projects and activities and acts as a consultant to the governmental bodies in charge of policies concerning women entrepreneurship.

As indicated in its name, the initiative operates above all as a forum supporting diverse actions that do not necessarily involve a continuous activity/contribution from the part of all members (labour agencies, banks, education, women projects, consultancies etc.). It realizes its various actions in a wider geographical area instead of focusing on a specific local problem and local long-term strategy. The forum defines itself above all as lobby network and network of multipliers (representing the interests of women that set up their own

enterprise). Furthermore, its aim is to *encourage* the launch of a wide range of local activities among local and regional stakeholders rather than implementing these activities itself.

#### **Example 4**

The working group "Business start-up through women" is an important actor in the promotion of women entrepreneurship in another region in Europe. Members of this working group were individually nominated by the Ministry of Economy and Labour and the Ministry of Social Affairs of a region. They represent a wide range of stakeholders:

- Agencies for start-up consultation
- Associations of women business owners
- Associations of women in management
- Banks
- Chambers of commerce
- Chambers of crafts
- Economic associations
- Economic development agencies
- Labour administrations
- Offices for equal opportunities at municipalities
- Offices for women and job issues
- Public support banks
- Universities
- Women entrepreneur networks

The objective of the working group is to promote women entrepreneurship by discussing obstacles and possible solutions, mapping structures and instruments of support, raising the awareness of business consultants on aspects concerning specifically women, initiating the draft of a guide for women entrepreneurs, disseminating information and encouraging projects or other initiatives.

Notwithstanding the implication of a large number of stakeholders and their pooling of knowledge, this interesting initiative represents above all a forum for discussion. It is limited in time and does not entail a continuous cooperation of all actors (meetings are organized four times a year) or a common implementation of actions on a concrete territory.

DEVELOPING LOCAL CLUSTERS FOR GENDER EQUALITY  
AND EQUAL OPPORTUNITIES:  
PROPOSAL FOR A PROGRAMMING AND EVALUATION TOOL

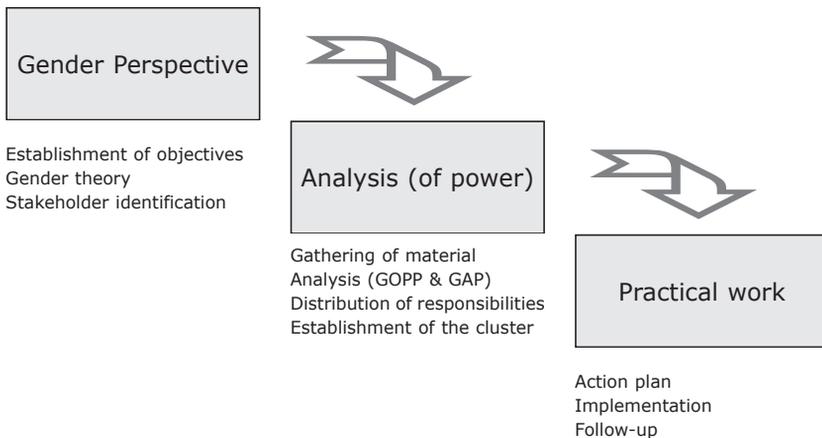
Establishing cooperation between different local actors is in its own nature a process that is often innovative and needs to be measured, systematically reflected and evaluated. The DESEO project aimed to examine possibilities to create innovative territorial clusters which would promote gender equality based on efficient mutualisation of resources. In order to do this effectively, an instrument for efficient programming of cluster activities has been developed, the DESEO programming tool. This tool is a combination of analytical methods used in different areas. DESEO experts and partners believe that, combined the right way, these methods create an efficient "pathway" to the creation of stable cluster processes for gender equality and equal opportunities in general.

Three important steps have to be taken into consideration:

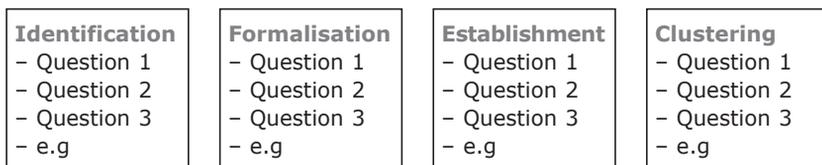
1. The first step focuses on the application of a gender perspective. It implies an active discussion of definitions and concepts related, for instance, to gender theory and equal opportunities. It is important to clearly stress and agree upon different terms and definitions as well as to secure that clustering and mutualisation are meaningful in relation to the societal topic chosen and the local reality. This becomes especially important when mutualising resources from different sectors applying "different meanings", i.e. different interpretations of concepts. Partners and stakeholders need to be identified carefully.
2. The second step is the analysis of power, which is a combined approach bringing together studies and materials for

the establishment of the cluster (strategies, work plans e.g). It includes the *goal-orientated project planning (GOPP)* method, which is used for a systematical analysis of aims and necessary activities. GOPP is connected to a *GAP analysis*, which clearly defines shortcomings in potential and actual performance. Finally, results of the *power analysis* will constitute the driving force for increased growth in the clusters.

3. The last step, a fairly practice-related work, represents a synthesis of the power analysis and its integration into an action plan, which should be implemented and followed-up properly.



The definition of main elements common for all clustering processes may be regarded as a strategic reflection of diverse situations in processes of effective clustering. These reflections may concern structuring or formalization of the cluster, the development of ideas, the creation of external networks and related aspects. The definition of main elements aims to identify gender-related questions that may be particularly relevant to the respective clustering phase.



## GENDER PERSPECTIVE, MACRO ANALYSIS AND STAKEHOLDER ANALYSIS

Before starting the process of systematic work on clustering for gender equality, it is neces-

sary to analyse in which context these processes will happen. A context analysis has to be carried out through discussion of different definitions and concepts related to gender theory and equal opportunities. Its objective is to create a common understanding on various concepts that are or will be applied.

Gender constitutes a normative aspect, which is generally built around the human concept of sex, i.e. a biological, physical division that was extended to a broad social construction. The latter, however, might lead to limitations regarding participation of women and/or men in society and economy. In sum, gender is a socially constructed means of assigning characteristics to sex categories. Gender boundaries may be changed, permeated and created. Here, one could quote Simone de Beauvoir who held that 'one is not born, but rather becomes a woman'.

It is important to find a common language regarding what subject will be addressed, why and how. Actors involved should find an agreement on what they associate with different concepts and definitions. Moreover, it should be ensured that the work is meaningful in the territorial context. This becomes even more important when mutualising resources from different actors using different meanings of concepts and definitions.

In the beginning of this process it is necessary to define the area of analysis, e.g. employment, work-life balance, entrepreneurship, finance etc. Usually different statistical data exist in the relevant area. They should be gathered and marked as "earlier context data". Together with the gender theory, this step will constitute the starting point for the trend analysis or, in other words, the Macro analysis.

The Macro analysis takes into account the trends in the given area (related to gender theory and existing data) in political, social, gender, legislative, territorial and economical terms. This will lead to a description of the situation and context.

After realisation of the *Macro analysis*, areas of responsibilities and required stakeholders have to be identified. If the partnership does not already respond to diverse results of the Macro Analysis and deduced necessities, it is important to ensure the sustainability of the cluster by adding or including more or other partners or stakeholders.

The following *stakeholder analysis* relates to the following questions:

- Which resources are needed and available in the present partnership?
- What competences are needed and available in the present partnership?
- In which areas are the partners present with activities?

A stakeholder analysis is used to identify and assess the importance of key people, groups of people or institutions that may significantly influence the success of the activity or project.

It has two main objectives: First of all, the analysis will identify *existing* resources and competences in order to define resources and activities that may be mutualised. Secondly, it will show which areas need to be complemented by involving other partners with necessary resources and/or competences into the mutualisation process.

The stakeholder analysis aims thus to:

- identify people, groups, and institutions that will have an impact your initiative (either positively or negatively)
- anticipate the kind of influence, positive or negative, these groups will have on your initiative,
- develop strategies to get the most effective support possible for your initiative and reduce any obstacles to successful implementation of your program.

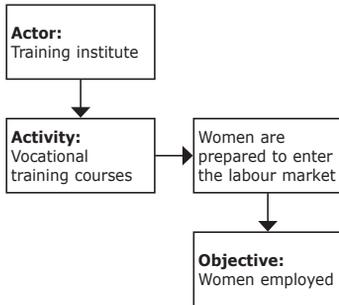
The second step of establishing a cluster promoting gender equality is to focus on the process of mutualisation as such. This will be done through an examination of useful documentation and the conception of studies (strategies, work plans e.g).

## GOPP ANALYSIS

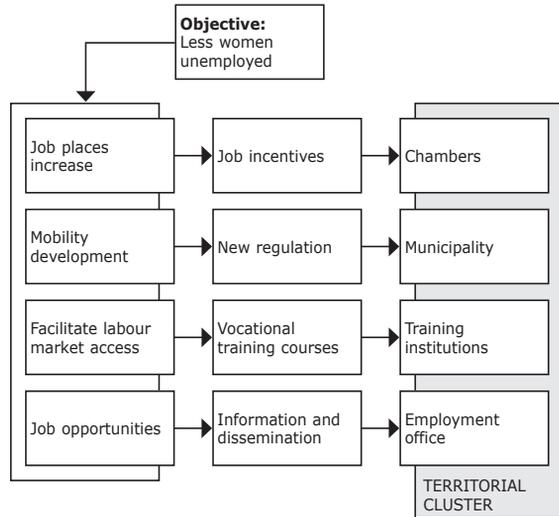
The *goal-orientated project-planning tool (GOPP)* may be easily applied for a systematic analysis of aims and required activities. GOPP enables groups of actors to analyse and prepare project plans in a participative way. The method can be freely used: it is not subject to copyright or a patent. It has applied used in a wide variety of situations since the 1980s and proved to be robust and effective in helping groups achieve consensus on the purpose and goals of their cooperation. GOPP is an excellent method for improving team effectiveness and mutualisation of resources.

The strength of GOPP is that the method allows transforming a projection through activities into a projection through objectives.

Projection through activities:

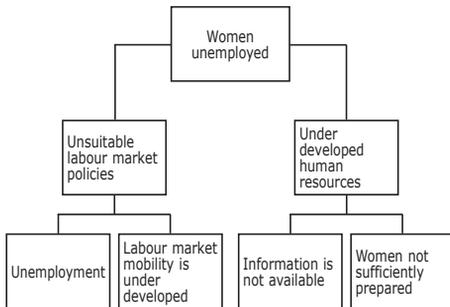


Projection through objectives (GOPP):

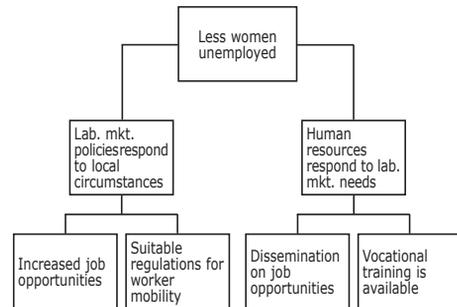


The GOPP analysis is conducted by all relevant partners concerned (all identified stakeholders) who jointly identify the problem connected to the context. It is important to assign an independent "GOPP coordinator", who will lead the actual work. In the end of the analysis, a problem tree will be established, with different branches of inter-connected problems. Here, reference should also be made to the stakeholder analysis. This process will allow for an identification of at least one of the main areas for the future clustering process. To change all problems into objectives, final aims as well as aims for each different stage of cluster activities should be defined.

Problem analysis:



Objective analysis:



When the different problems and objectives have been identified, actors have to find out in which area the mutualisation of resources seems most appropriate. The *scope* of future cluster activities have to be defined: What do we want to achieve out of our mutualisation?). In this context, another important step is the identification of measurable indicators for the activities planned by means of the GOPP analysis.

	LOGIC	INDICATORS	SOURCES	ASSUMPTIONS
OBJECTIVE	Less women unemployed	Average number of male and female workers	Registration statistical office	National legal framework does not change during the project
SCOPE	Suitable labour market policies	X% labour market turnover	Labour chamber report	Women target group is sufficiently prepared
OUTPUT	More job opportunities	X% labour demand increase	ILO yearly report	Available labour force
ACTIVITIES	Incentives to create new jobs	<b>INPUTS</b>	DESEO report	Entrepreneurs obtain incentives
				<b>Not enough work places</b>

The GOPP method should ideally be followed by a GAP analysis.

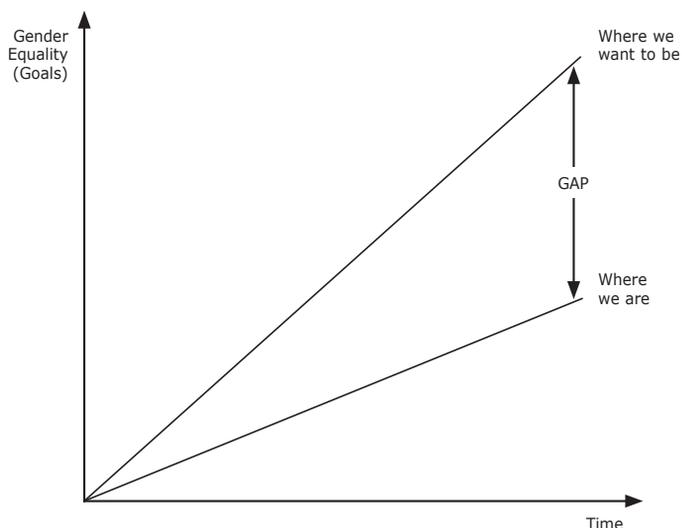
## GAP ANALYSIS

GAP analysis is an assessment tool allowing for a comparison between the *current* and the *potential* performance of an organisation, company, authority or initiative. If a company, for instance, does not make use of resources it actually owns, it may be producing or performing at a level below its potential. The same could be stated for a region or organization that, due to insufficient gender equality management, does not use all its human resources.

'Gap analysis' constitutes thus a formal study of how different actors are currently performing and where they want to go in the future. Gap analysis provides a foundation for measuring investment of time, money and especially resources required to achieve a particular outcome.

The goal of the gap analysis is to identify the gap between optimized allocation and integration of inputs and the current situation. It determines and documents thus differences between requirements

and capabilities. Gap analysis may be linked to specific benchmarking and other assessments. Once the general expectations for the performance are defined and understood, it is possible to compare these expectations with the actual performance. GAP can be applied at the strategic or operational level of an organization.



At this stage, the distribution of responsibilities amongst partners in the network will thus be based on the definition of activities by the GOPP analysis and main objectives to fill shortcomings such as they have been identified in the GAP analysis. Context analysis, stakeholder analysis and analysis of concrete objectives and activities may be seen as the foundation for processes of mutualisation.

#### REALISATION OF CLUSTER PROCESSES

Before the very practice-related work, namely cluster establishment and mutualisation may be launched, a strategic action plan should be established. Different methods exist. The widely known *SWOT analysis* appears to be a good instrument to conceive a relevant action plan referring to the GOPP and GAP analysis.

SWOT Analysis is a strategic planning tool used to evaluate the **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats involved in the DESEO clustering process. It involves a specification of the objective of the activities and identifies internal and external factors that are favourable or unfavourable to achieving that objective.

In the DESEO gender clustering process, the SWOT analysis is a result of the trend analysis, stakeholder analysis, GOPP analysis and GAP analysis. It results in the creation of the final action plan for the establishment of the clustering process.

Since a clear objective has been identified (through the GOPP analysis), SWOT analysis is applied above all in order to ensure the appropriate pursuit of that objective. In this case, SWOT means:

- **S**trengths: attributes of the organization that are helpful to achieving the objective.
- **W**eaknesses: attributes of the organization that are harmful to achieving the objective.
- **O**pportunities: *external* conditions that are helpful to achieving the objective.
- **T**hreats: *external* conditions that are harmful to achieving the objective.

Identification of SWOTs is essential because they form the basis of subsequent steps in the process of planning for achievement of the selected objective. They are also used as inputs to a creative generation of possible strategies, by asking and answering each of the following four questions:

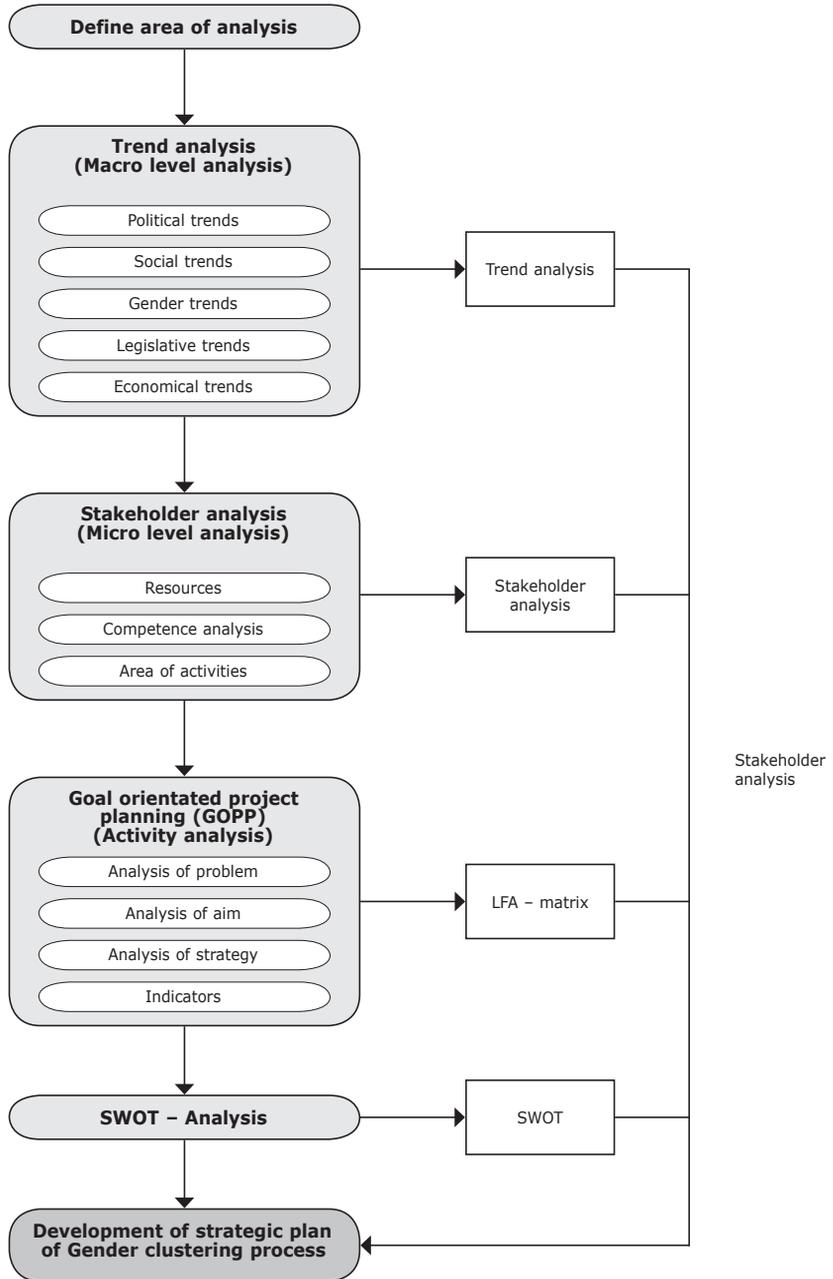
- How can we **U**se each Strength?
- How can we **S**top each Weakness?
- How can we **E**xploit each Opportunity?
- How can we **D**efend against each Threat?

SWOT may also be employed for evaluation of the outcomes of the processes of cooperation and clustering activities.

As a result of the SWOT analysis, an action plan has been created.

	<b>HELPFUL</b> to achieving the objectives	<b>HARMFUL</b> to achieving the objectives
<b>Internal origin</b> attributes of the participating partners	<b>STRENGTHS</b>	<b>WEAKNESSES</b>
<b>External origin</b> attributes of the environment	<b>OPPORTUNITIES</b>	<b>THREATS</b>

Methodologically, the above-mentioned process may be pictured as follows:



Following the above-mentioned analytical model, a stable cluster at local level may be established. Once the cluster is operating, an appropriate and continuous follow-up of its activities should be ensured.

The debate over corporate social responsibility is not new, since it has gone on for many decades. However, measurement instruments for soft values, social or gender equality return on investments are a fairly new phenomena in society. The methods described below might be applied when evaluating the performance of DESEO clusters.

### Theory of change

Theory of change is a tool to design and evaluate social change initiatives. By creating a blueprint of the building blocks required to achieve a social change initiative's long-term goal, such as improving a territorial gender equality activities, a Theory of Change offers a clear roadmap to achieve desirable results identifying the preconditions, pathways and interventions necessary for an initiative's success.

Theory of Change defines all elements required to bring about a given long-term goal. This set of connected elements is referred to as outcomes<sup>1</sup> and is depicted on a map representing a pathway of change, which is a graphic description of the change process.

Built around the pathway of change, a Theory of Change describes the types of interventions<sup>2</sup> (a single program or a comprehensive community initiative) that bring about the outcomes depicted in the pathway of a change map. Each outcome in the pathway of change is tied to an intervention, revealing the often-complex web of activities required to bring about change.

A Theory of Change would not be complete without an articulation of the assumptions<sup>3</sup> that stakeholders use to explain the change process. Assumptions explain both the connections between early, intermediate and long term outcomes and expectations as to how and why proposed interventions will lead to these outcomes.

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1 An outcome is a state or condition that must exist for an initiative to work and does not currently exist. An outcome may represent a change in a group of people, organizations, or places.

2 Interventions are specific actions a program or group of stakeholders will undertake to bring about outcomes.

3 Assumptions relate to conditions or resources that, in the opinion of a group of actors, are needed for the success of a program and that already exist. An assumption represents a condition for a program's success. Unlike a precondition, it already is in place and does not need to be brought about. A proper and well-founded definition of assumptions is crucial. Incorrect assumptions may completely alter the operations of a program.

Stakeholders value theories of change as part of program planning and evaluation because they create a commonly understood vision of the long-term goals, of how they will be reached and of which instruments will be used to measure progress along the way.

### Gender equality return on cluster investment

All economic activities create a range of types of impacts, only some of which are measured using conventional financial accounting. The analysis of *Social Return on Investment (SROI)* is a method focusing on the value being created by initiatives in addition to the financial value. This added value can arise from social, human and environmental impacts.

To apply SROI, some fundamental questions have to be answered:

**What** are we trying to change, prevent or influence?

What **result** do we want to realize?

What **assumptions** do we have on cause and effects that will lead to our desired outcome?

What **added value** do we create?

The final objective of activities the outcome of which has to be measured has to be clearly defined, e.g. "work on and strengthen existing networks to realize and mainstream cluster practices for gender equality and strengthen demand for related services, rather than create new ones"

Following matrix shows the different steps of the SROI idea:

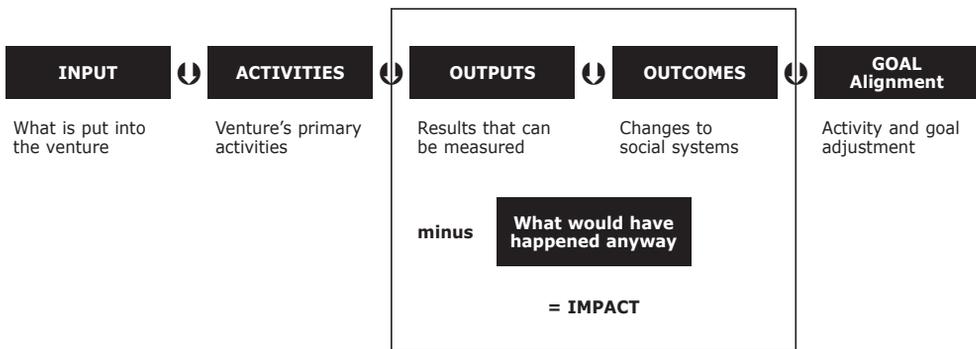
Input	Activity	Output	Outcome	
Money (also in-kind, time and grants shall be regarded as financial investment)	Mutualising resources among social economy organisations; implication of local authority	Change in public planning, work places for women etc.	Change in activities, performances and opportunities related to gender equality	
			Attribution	Impact
			Other programs with similar objectives	Change in regional gender realities (historical view/ comparison with other regions)

The SROI method consists of following elements:

- Scope
- Stakeholder-analysis
- Impact and indicators
- Projections of social results
- Accounting social value
- Reporting

Definition of the scope, stakeholder analysis and indicator analysis have already been realised by the GOPP analysis. In the SROI analysis we need to further deepen the stakeholder analysis so as to establish a mapping of potential investors and beneficiaries. In the case of DESEO clusters, where we measure societal change and territorial structures (clusters), we need to have a more comprehensive view of who our stakeholders are. Stakeholders are the initiative as well as society in general.

The impact is the difference between the outcome for the stakeholders *identified as a result of the initiative* and the outcome that would have occurred anyway *without the initiative*. It is generated by calculating the inputs (resources used to carry out the activity – money, people, facilities and equipment) and connect them to the activities conducted in order to measure the outputs (measurable units created by the activities). The outcome relates to the changes that occur in conditions, people and policies as a result of the activities inputs, activities and output. However, most important is to measure the *impact*, which is, as mentioned above, the difference between the outcome and the outcome that would have occurred anyway (deadweight).



The most difficult part of the SROI cost-benefit analysis is probably the definition of indicators to be used in order to achieve a reliable result in terms of sustainability. Indicators for impact are sometime more easy to find in some cases than in others. Especially in social

change, they are hard to identify. Impacts may consist of two or more indicators.

In clustering activities for gender equality it might be necessary, for instance, to measure self-confidence or social safety of women in the territorial context. If self-confidence of women is an objective, the former can be measured only by investigating the change in people's behaviour. Changes might occur, for instance, in the number of social contacts, visits to support agencies, number of guiding hours etc. Social change means sustainable, long-term changes. For every part of these changes indicators have to be defined that may be translated into financial costs and benefits.

The indicators shall be SMART (Specific, Measurable, Acceptable, Realistic and Time-limited). It is furthermore essential that they be related to the initial mission.

After having established measurable indicators, objectives regarding indicators for upcoming years need to be set. In order to do so, indicators have to be monetized in euro-value. Moreover, multi-year projections of social costs and benefits have to be made. Market prices should be used as far as possible. Moreover, the "travel cost method" (value of transferring oneself from one point to another) or methods related to the prevention of costs (costs avoided by activities) might be applied. In some cases, the widely accepted "contingent valuation method" (how much are we willing to pay in order to...?) may be used.<sup>4</sup>

There is an obvious difficulty in determining a comprehensive, valid, reliable value for a given social impact when there is no market-based price for it. Therefore, a mutualisation of resources promoted by the DESEO project and even more the exchange of experiences are important in order to establish several fictive markets for units of social impact. This will render a comparison possible.

After the conclusion of the projection phase, an analysis of income and expenditures of activities should be carried out. Therefore, an overview of costs and benefits of the activities has to be drawn up. Once the total for income and monetized social benefit as well as for expenditures and monetized social costs have been estimated for future years, it is possible to calculate and account social value.

Since results depend on assumptions, accounting should by preference be used to present a range of scenarios.

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<sup>4</sup> Further information on SROI and value estimation can be found, for instance, on the website of the New Economic Foundation: [www.neweconomics.org](http://www.neweconomics.org).

## FEASIBILITY ANALYSIS AND TEST APPLICATION ON THE PARTNER TERRITORIES

Drawing on the working definition of a DESEO cluster and jointly defined minimum standards (see chapter 3), the partners proceeded with local tests regarding feasibility and possible design of a future territorial cluster for equal opportunities.

Realities, needs and priorities differed from territory to territory. Therefore, different fields of experimentation have been identified (transport, business support, employment, access to credit, information *on* and implementation *of* legislation in general ...). However, all activities made, wherever possible, reference to the minimum standards mentioned beforehand. These standards have been verified in the course of these local tests.

Finally, the reader's attention has to be drawn to the fact that some partners already disposed of a certain experience in clustering and rather advanced local partnerships whilst others had to "start from scratch". Existing partnerships between local actors and collaboration of different types proved once again a crucial key to success for processes of local development and innovation. A number of project partners were already used to work with other structures on their territory. This enabled them to directly discuss possible scenarios of mutualisation and cluster creation. Other project partners that were not in a position to refer to existing relationships to other local actors were confronted with greater difficulties. Their objective was thus to first of all take a fundamental step towards future cluster activities by establishing a *network of potential cluster members*.

In the following sub-chapters, extracts of the experimentation reports of the partners will be provided.

CITY OF MESSINA/PIATTAFORMA PER L'ECONOMIA  
SOCIALE DELL'AREA DELLO STRETTO (IT):  
SHARING INFORMATION TOOLS TO FOSTER  
EQUALITY AT THE WORKPLACE

Definition of the general context and needs for action

A major obstacle for gender equality, identified by DESEO part-

ners in Messina, is the lack of initiatives and services promoting work-life balance as well as insufficient dissemination of information on the latter. Employees, be it in the public or (social) private sector, still experience great difficulties when it comes, for instance, to the reconciliation of work and family life. Here, it is still women who are most affected.

Particularly in the private sector, work-life balance is often perceived as an individual need to which enterprises respond rather sporadically. It is less considered as a right. Moreover, enterprises are frequently rather reluctant in institutionalising practices promoting gender equality, as the latter could question the conventional organisational context and existing structures.

In addition, on the labour market, female employees usually have a comparatively low salary and fulfill positions that are to be found rather at the bottom of the organizational hierarchy. Most often, higher positions are attributed to men, who are considered a workforce able to ensure a greater continuity in the production process and a higher investment of working time.

On the other hand, a number of different measures and initiatives to counteract the above mentioned problems, in particular those related to work-life balance, have been developed in recent years. Nevertheless, well-targeted information activities regarding the appropriate use of these measures and instruments that would take into account needs of women and men are missing.

Specific objective of local DESEO activities

Local experimentation activities in Messina focused thus on the objective to develop and test new, mutualised instruments of information that would target employees and employers in the public and (social private) sector. Therewith, partners hoped to increase knowledge of and understanding for the need of family-friendly measures as well as their application at the workplace. Among the planned outputs of the experimentation phase figured a specific information desk.

Partners

Experimentation activities on the territory of Messina were coordinated and realised by the local project partners, namely the city of

Messina and the Piattaforma per l'Economia Sociale dell'Area dello Stretto, a local social economy platform.

The city of Messina experiences a part of the aforementioned problems in its own structures. One third of its employees are female. Higher positions are mostly held by men, whereas the latter are nearly completely absent in areas considered as typically "female" (social assistance, education...)

Since years, the local administration has shown a high interest in promoting gender equality. Different initiatives and projects have already been carried out in this domain. Among these initiatives also figure numerous training sessions for employees of the municipality.

In 2006, an equal opportunities committee has been established. This committee is composed of two working groups which conceive the Triannual Plan for Positive Actions and draft diverse national and European projects. In this context, a specific code of conduct for gender equality, targeting the local administration, has been developed and approved.

The Piattaforma per l'Economia Sociale dell'Area dello Stretto (local social economy platform) brings together different social economy actors which collaborate among themselves and were involved in DESEO experimentation activities at local level. Among these structures figure *Mare Sol*, a consortium (management of social and health services), the co-operative *EcosMed* (training, research and consulting), the association *Arkesis* (integration of disadvantaged groups in the labour market), the network *Centro Servizi l'Acquario* (training, culture, environmental protection) and the consortium *Terre del Sole* (realisation of agricultural projects on territories confiscated from the mafia). Through a number of projects focusing above all on disadvantaged groups of society, the members of the platform have developed specific expertise related to the promotion of equal opportunities. Diverse training activities have been realized.

Apart from the main objective to conceive new instruments and methodologies for target-group oriented information on measures promoting work-life balance, both DESEO partners hoped to reinforce dialogue as well as to exchange and better validate best practices among themselves. Knowledge of each other's initiatives had initially been rather low.

#### Activities of the cluster and resources

In order to identify main necessities regarding efficient information on diverse measures for work-life balance, partners first of all conceived a questionnaire. This questionnaire was distributed among

members and employees of the platform and the city of Messina. It contained questions relating to aspects such as the family status, education and training, work and working conditions, knowledge of legislation and of other initiatives on equal opportunities; Moreover, it focused on specific needs of the employees.

In a next step, partners pooled different kind of information and documents related to relevant legislation and measures at the workplace that foster work-life balance. Here, an already existing data bank of the Piattaforma dello Stretto and documentation provided by the equal opportunities committee were of great use.

First outcomes of this collection of information were fed into the future website of information desk for equal opportunities as well as into a specific area of the intranet of the city of Messina.

Finally, thanks not at least to the voluntary collaboration of several representatives of the equal opportunities committee of the city of Messina, who invested their time and knowledge, the information desk could be established. It aims to disseminate and better channel, in a very target-oriented and systematic way, information on equal opportunities and instruments for its promotion. The desk has to components: a front office providing assistance to public employees as well as a back office dealing with specific questions of employees of the private sector. The front office is run by the city of Messina, with special support of the equal opportunities committee. Services of the back office are coordinated and delivered by experts of the Piattaforma.

The information desk was opened on 11 December 2007 for a test period lasting till the end of February 2008. Its impact as well as possibilities to maintain the desk beyond the time limits of the project will have been analyzed by then.

The desk, situated in the premises of the city of Messina, provides information on instruments related to:

- Decentralised contracting;
- Creation of opportunities for reconciliation of work and family life;
- Parental leave;
- Maternity;
- Telecommuting;
- Indirect and direct discrimination;
- Mobbing etc.

### Resources

In the beginning of the experimentation activities, a concrete plan regarding objectives, methodology, actions and the mutualisation of necessary resources was established.

Both structures made human resources and therewith specific exper-

tise and know-how available (IT specialists, graphic designers, equal opportunity experts, social assistants, advocates, psychologists, sociologists etc.). Methodology of the survey and questionnaire were conceived by experts of the city of Messina. To support research for specific legislation, the city provided access to the legislative data bank of the Ministry for Equal Opportunities. The Piattaforma, in turn, delivered important input in terms of documentation by creating access to the data bank IRIS, which contains a broad range of information on European legislation for equal opportunities as well as on national legislation regarding equal opportunities and the private sector. The front office of the information desk has been set-up in the premises of the city of Messina.

#### Strengths and positive effects

Both partners felt motivated to continue activities and face related challenges due to their common interest in the well-being of the territory and, in particular, the opportunity to disseminate information on equal opportunities in a more systematic and targeted way.

Even though they did not always share the same opinion on methodologies or the division of responsibilities and resources, they appreciated the opportunity to seek for new methods of cooperation that would allow them to more effectively share know-how and competences.

Partners felt that the local project activities provided them with a major opportunity to test a new methodology of work and collaboration, which could possibly also be transferred to other areas and be adapted in cooperation with other local stakeholders.

The city of Messina seized the opportunity to work in a network also internally by involving the expertise of different departments of the local administration in the conception of experimentation activities.

The Piattaforma's experiences of cluster creation among its own members can be considered a positive asset and basis for the experimentation.

Despite certain obstacles (see below), the partnership tried to realize its objectives following the general indications and standards conceived by the European DESEO partnership.

An important contribution in terms of human resources was delivered by the representatives of the equal opportunities committee who got involved in the activities on a voluntary basis.

#### Weaknesses

Experimentation activities in Messina showed that the establishment of clusters and processes of mutualisation necessitates well-elaborated strategies and time. It is thus impossible to make it happen "overnight" or in a period of 15 months. This is particularly true in cases

such as Messina where social and economic conditions render a continuous and stable cooperation between the public and the private sector rather difficult.

Finally, the establishment of clusters such as they are proposed by the DESEO project, requires changes in existing systems of power as well as in traditional patterns of thinking.

Consequently, during the local experimentation activities in Messina, several disagreements between the partners emerged. They were mostly related to relationships of power and responsibilities, to specific objectives as well as to appropriate methods to share resources. Long processes of mediation were thus necessary. They slowed down experimentation to a certain extent.

Processes of negotiation and establishment of relations based on trust in each other are vital in order to ensure the willingness of different local actors to participate *in* and develop the partnership.

Finally, however, it should be underlined that the project partners in Messina made great efforts and continued searching for a consensus in areas of initial disagreement.

A second weakness inherent to the experimentation activities in Messina lies in the lack of resources, which concerns in particular social economy structures. Additional resources have to be found to ensure the sustainability of project activities.

### *Perspectives*

With respect to public administration, the establishment of the equal opportunities committee and the adoption of the triannual plan of positive actions created a rather favorable framework for innovative initiatives such as the DESEO experimentation activities. Instruments developed by the partners in Messina have been integrated in actions deriving from this plan and might therewith ensure a continuation of the initiative.

Project outcomes will be spread within the networks of each partner. The city will further build on DESEO results and promote awareness-raising actions among its employees. Piattaforma, in turn, will take the opportunity and continue to disseminate jointly developed expertise and instruments regarding work-life balance among social economy enterprises belonging to its own structure and network.

Both project partners already declared their willingness to disseminate and transfer DESEO methodologies to other domains, thereby applying and adapting them in partnership with other local actors.

Finally, jointly conceived instruments, such as the questionnaire, will possibly be (re-)used by the partners in future initiatives for gender equality and equal opportunities.

Definition of the general context and needs for action

Gender equality has been an issue on the agenda of Spanish politics

for the last few years. In March 2007, a new law for gender equality, entitled "Law for effective equality of women and men" was finally adopted.

The original text stresses that *"the novelty of this law lies in the prevention of discriminatory conducts and in the objective to make the principle of equality effective in the foresight of active policies. This implies necessarily a projection of the equality principle on the different fields of the social, cultural and artistic reality where inequality can be generated or perpetuated. Hence, the consideration of the transversal dimension of equality, an expression of modern rights related to antidiscrimination, is the fundamental principle of this text."*

The law regulates general matters, on which the state can intervene directly. However, it also introduces changes in specific pieces of legislation regarding areas such as public health system and regulations on the workers' statute.

Interventions that the Barcelona Provincial Council has already been promoting in the field of gender equality are now supported by this legislation. Municipalities, enterprises and trade unions have to start and implement concrete actions to promote gender equality.

Although the new law is supposed to guarantee gender equality and promote the implementation of concrete actions, it is sometimes not concrete enough and rules regarding its implementation are missing. As a result, enterprises do not feel urged to implement changes, *no schedule* is fixed, and changes in the behaviour of various actors do not happen. Besides, a *lack of knowledge* of the aforementioned law can be stated among trade unions and union representative committees. This compromises the incorporation of the new rules in collective negotiations.

Lack of knowledge of legislation is one obvious obstacle. But there are other, related barriers that appear even harder to overcome. They make real changes difficult to achieve. One of the greatest obstacles identified relates to the fact that decision-making still happens in the framework of structures ruled and conceived by men. Equality policies are considered a minor issue and the gender perspective is not taken into account seriously enough. Gender equality thus has to be continuously legitimized and pushed for in order to make it a main axis for planning and execution of actions in enterprises and public bodies.

Regarding public bodies and administrations, one main obstacle is

linked to the limited terms of office of politicians: If there is no continuity regarding the parties or the persons in charge of the issue, the implementation of equality plans can be compromised and slowed down. Often, in municipalities, these plans are promoted by the women's office (in case it exists), which normally has a fairly limited budget and from where it is difficult to propose deep or transversal changes. Everything finally seems to depend on the good intentions and will of the politicians... However, if the latter change, there is no guarantee of the continuity of the process.

In both the public and private sector, gender equality is thus a priority neither on agendas nor in budget and programmes. Transversal changes, organizational changes or changes that might affect systems of power are not easily understood or accepted. Small actions, dissemination activities or plans are very welcome, as long as they do not affect established structures. Deeper interventions are most of the time questioned or sidelined.

All these considerations lead to the assumption that one of the main obstacles is still the society's way of thinking, i.e. a masculinised mentality and way of doing. Dissemination and awareness-raising are thus still vital to start changing realities from the bottom by concrete actions and new forms of cooperation.

An issue that needs to be addressed and revised concretely is the labour model which reflects still to a large extent needs of men. Changes regarding conciliation of family and working life are necessary. Bad practices such as the lack of transparency in the moment of the selection of human resources or discriminative attitudes when hiring staff have to be avoided.

Another element which has to be taken into account is the way gender equality projects, plans or activities are "sold", i.e. how they are presented to society in order to make them attractive and comprehensive. A possibility to "sell" gender equality to enterprises, for instance, was the use of the concept of "keeping talents" in the enterprise. Women have a number of talents and specific capacities. An introduction of equality programmes or of plans for reconciliation of work and family life may reduce the exodus of women from the labour market and therewith the exodus of talents from the enterprise.

#### *Specific objective of local DESEO activities*

During the last few years, gender equality has started to become an issue in *discourses* of representatives of local authorities, and it also became a matter of *policies* as such.

In this context, a few local authorities in and around Barcelona, in most cases supported by the Barcelona Provincial Council and the local women's office, have started to develop "Gender Equality Plans" for the whole municipality.

Development of these plans does not pose problems. Obstacles appear in the moment these plans are implemented and are supposed to kick off real changes in the behaviour of different local actors.

Consequently, local activities of the DESEO partners in Barcelona were based on the objective to improve the concrete implementation of gender equality plans and legislation at local level through *information, awareness-raising, communication between diverse actors and training*.

To this purpose, local actors first had to establish a network which would enable them to enhance their collaboration. Most of them had never worked together before. This network development has to be considered a pre-condition for a possible future cluster creation on the territory of Barcelona. Awareness-raising activities had to be carried out. Different actors, resources and possibilities of collaboration had to be identified.

#### Partners involved

DESEO actions in Barcelona were coordinated and promoted by the association CEPS.

Local stakeholders that participated in local DESEO activities represented a) social economy (CEPS, Espais per la Igualtat), b) private enterprises (Aleph Comunicació), c) trade unions (UGT and CCOO), d) local authorities (Ajuntament del Prat de Llobregat) and e) regional authorities (Generalitat de Catalunya, represented by the labour department and the programme for equal opportunities).

All the mentioned participants are involved in the realisation of gender equality plans or the promotion of gender equality at different levels. This helped in generating a more general view regarding main obstacles in the implementation of aforementioned plans both in the public and private sector.

A positive attitude towards the new law on the promotion of gender equality, the promotion of gender equality plans at a local level and related difficulties as well as, most and foremost, *a lack of debate at a technical level* were the main incentives for above mentioned stakeholders to join the DESEO activities. Most of the time, interaction, *at a technical level*, between different actors in these fields has almost been inexistent.

All of the participants shared the interest of disseminating and realising gender equality as a social and transversal issue, rather than a 'women's issue'.

### Local project activities and results

Activities started with a research for specialists in equal opportunity policies at local level with whose assistance main needs for action were identified. Subsequently, a map of resources and competences was created.

Finally, the different actors involved, i.e. third sector, local authorities, private enterprises and trade union representatives, met in the framework of a workshop to discuss main obstacles in implementing equality plans and possible joint initiatives. The workshop was prepared by CEPS in cooperation with Espais per la Igualtat and realised by gender experts of the latter. Workshop conclusions were disseminated within the networks of the participants.

One of the most important results of the workshop relates to the fact that stakeholders realized that they have very few opportunities to exchange and collaborate at a technical level. Activities such as the workshop were therefore welcomed. Most actors expressed themselves in favour of a continuation of meetings.

As explained before, the experimentation in Barcelona did not reach the point of conceiving first scenarios for a possible cluster creation. However, they could strengthen communication between different stakeholders, promote the creation of a network and launch collaboration as future foundation of clustering activities.

### Strengths and positive effects of the experimentation

A major strength of local DESEO activities in Barcelona lay in the participation of a broad range of diverse actors (local authorities, trade unions, social economy...). Different kind of knowledge and expertise as well as different perspectives enriched the discussions.

Moreover, the initial mapping of local resources turned out to be a useful basis for discussion and planning of joint activities.

A multiplier effect was created due to the fact that all involved actors have their own networks, in which information about the initiative and its subject was disseminated. It reached other local authorities, social economy organisations, traditional enterprises etc.

Project activities responded to a major, though very basic need, namely the creation of space to debate possibilities to promote gender equality from different technical points of view.

In particular the cooperation between CEPS and Espais per la Igualtat has been advantageous, as both structures shared their experience as experts in gender equality. Both of them provided very practice-

related point of view of service providers working for local authorities that elaborate gender equality plans.

### Weaknesses

Due to the absence of stable relationships between the different local actors at the beginning of the project, activities could not reach the stage of design of a future cluster. They could just add to the establishment and reinforcement of dialogue and cooperation between diverse stakeholders.

A major weakness lies in the fact that, so far, collaboration and dialogue have been based on rather personal interests and attitudes. To date, no institutional agreement or a specific policy to promote partnerships and clustering for equal opportunities exists.

Moreover, as policies and politicians might change, priorities shaping the context of collaboration might change, as well. Dialogue risks to be interrupted.

### Perspectives

Up until today, the promotion of gender equality most often still depends on the good will of political representatives and administration to lend support to these initiatives. Political or personal changes can influence the participation of some stakeholders. In this context, the need to create other forms of local exchange and alliances for the promotion of equal opportunities becomes even more obvious.

During their joint activities, local actors in Barcelona recognised this. They will now seek to continue their exchange, coordinated by CEPS, and establish stable relationships which might result in common projects regarding the promotion of gender equality programmes. A successful realisation of the latter might then lead to a proper mutualisation of resources and clustering processes in specific fields such as training of public administrators, employers and employees.

### Definition of the general context and needs for action

A majority of employees of the social economy sector in

Italy are women. This might lead to the assumption that social economy represents an ideal place to develop skills and capacities of women. In contrast to private enterprises and the public sector, they might provide women with better opportunities to be allocated important responsibilities and to access higher positions within the organisation.

Several studies, however, show that the predominance of women in the non-profit sector as well as in social economy not only tends to reinforce discrimination regarding career opportunities or access to

PROVINCE OF PIACENZA/ETHOS/CE.SVI.P. (IT):  
MUTUALISING TRAINING FOR  
WOMEN MANAGERS IN SOCIAL ECONOMY

higher positions. Due to a lack of valorization of women's contribution, it might also entail a devaluation of the whole sector.<sup>1</sup>

Lower entrance barriers and a broader range of different kind of contracts are often perceived as positive aspects regarding work in the social economy sector. Moreover, due to the higher diversity of work contracts that may better respond to the needs of the workers, women with responsibilities in their family, for instance, might find easier conditions to reconcile family and working life. However, these arguments may be seen in another light when considering negative aspects such as low salaries and limited career opportunities. Better training opportunities and a higher flexibility in terms of work-life balance may go hand in hand with lower chances to have access to a *stable* working place, appropriate career opportunities, good salaries etc.

Prejudices and stereotypes regarding women, in particular women making their career, a lack of valorization of so-called female competences and the frequent exclusion of women from decision-making and managing positions constitute cause and effect of an ongoing discrimination. They can be found also in social economy. Women represent hardly more than a third of all employees in Italy and two third of employees in social economy. Face to the last figure, the presence of strong mechanisms of discrimination of women in social economy seems surprising.

To give a more concrete example: Women represent 73, 8 per cent of employees of social co-operatives. However, they hold the position of the president only in 37 per cent of all cases.

There is thus a contradiction between the dynamics of development of female competences in social co-operatives and the persistence of obstacles hindering women to access higher positions in the organizational hierarchy...

Social co-operatives are still far from being completely neutral or representing fully-fledged alternatives to predominating models of social segregation.

#### *Specific objective of local activities and a possible future cluster*

In view of the realities described above, the objectives of a future cluster in Piacenza are the following:

- a. to reinforce, among female employees and managers of the structures belonging to the cluster, capacities linked to management and entrepreneurship;
- b. to support the access to credit of smaller social co-operatives

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1 Steinberg Ronnie J., Jacobs Jerry A. (1994), "Pay Equity in Nonprofit Organizations: Making Women's Work Visible" in *Women and Power in the Nonprofit Sector* edited by T. Odendahl and M. O'Neill. San Francisco, Jossey-Bass, p. 79-120.

(in particular those with a high proportion of female employees) through the creation and promotion of an instrument facilitating the assessment of the social impact of the activities of these co-operatives on the territory.

### Partners involved

Local experimentation activities were coordinated and promoted by the project partners Province of Piacenza, Ethos co-operative and CESVIP. Their joint objectives focus, above all, on the promotion of local development processes through the support of small social co-operatives.

Moreover, two other small social co-operatives (Mele Verdi, Antarius) have been involved in establishing a partnership, in the framework of which possibilities for a mutualisation of resources and know-how were discussed and experimented. They all have similar basic characteristics: a) small structures, b) activities at local level, c) provision of social services, d) predominance of female workers – also and above all in management positions.

Ethos, Mele Verdi and Antarius – the future cluster – face similar challenges regarding growth and development. They experience problems such as:

- difficulties to design a proper business plan in order to identify middle and long-term objectives;
- a lack of managerial ability in properly implementing plans;
- difficulties to access credit.

On the other hand, the three co-operatives may put at disposal and share among each other the following resources:

- profound knowledge of local realities;
- specific competences regarding planning and implementation of social and health services;
- knowledge and competences of consultants, psychologists, trainers, social workers etc.

As has already been mentioned above, the joint objective of their future clusters activities is to develop strategies for a better management of small and medium co-operatives, based on an improvement of managerial or administrative capacities of (female) employees.

To this purpose, continuous training activities for the employees of the three co-operatives need to be organized. This, in turn, requires continuously updated knowledge regarding strategic instruments that would promote professionalism of managers.

In the course of the experimentation activities, the three co-opera-

tives were able to divide among themselves the costs for training and consulting, to rationalize the necessary resources and, not at least, to realize an important experience of collaboration and exchange.

Diverging interests between the coordinating partners did not appear. This might in particular be due to the fact that each of the partners could contribute to the initiative with its own competences and strengths while continuing to pursue, during the project activities, the mission of the own organization:

Ethos, for instance, could provide its own competences regarding consulting, project development and support of public authorities.

CESVIP put its expertise in training matters at the disposal of the partners and the cluster. It coordinated the analysis of training needs in the three co-operatives and helped establish proposals for a proper training process.

The Province of Piacenza, as public entity, supported the experimentation activities insofar as it disseminated information on ongoing activities and results on its territory, thereby enhancing the visibility of the process itself as well as of the participating co-operatives. The promotional actions carried out by the Province of Piacenza also included important awareness-raising activities, among other enterprises, on the advantages of mutualising competences and resources so as to create synergies in specific fields of actions.

### Resources

All resources needed to implement the given objective were not immediately available within the participating co-operatives. Especially finances still had to be raised.

However, in the course of the experimentation activities the training process entitled ***Percorso formativo di aggiornamento per i dipendenti delle cooperative Ethos, Mele Verdi e Antarius*** (*Training module for employees of the co-operatives Ethos, Mele Verdi and Antarius*) has been approved and will be financed by a specific fund (Fondo Paritetico Interprofessionale per la Cooperazione «Foncoop»). Apart from contributing with know-how to the establishment of indicators for an impact assessment, each co-operative will contribute with a part of the match funding to the financing of the training activities.

In the framework of a process, accompanied and coordinated by the local DESEO partners, the three co-operatives identified major obstacles to their development, defined common objectives and individualized training activities to be mutualised.

All three cluster structures showed themselves satisfied and convinced by the way decisions were taken during the test activities, by

the outcome of the latter as well as by the advantages emerging for each of them with the participation of their employees in a training process tailored to their specific needs.

All decisions within the future cluster have been taken jointly and were accepted by all the partners. Each of the three co-operatives has been involved in the planning process. Specific needs and expectations were taken in due consideration. This smooth collaboration has been made possible a) through the arrangement of regular meetings between the co-operatives as well as through b) already existing close working relationships among the co-operatives (members of the consortium Sol.Co. Piacenza) and the local DESEO partners.

#### Activities of the future cluster

The co-operatives that are part of the cluster will be involved in a process of training and consultation, based on the coaching methodology<sup>2</sup>. These activities will enable (female) employees to further develop their managerial and administrative competences as well as their capacity to elaborate entrepreneurial strategies.

Contents of the training modules may be summarized as follows:

- The co-operative and the role of management
- Management activities: programming, organizing, guidance, coordination and control
- The business plan as strategic instrument and analysis tool: presentation of the enterprise, products and services, market analysis, competition, strategic objectives, cost-effectiveness of the initiative, organization, planning and costs of human resources, the investment plan, the statement of assets and liabilities, book-keeping, accounts and economic prospects, the budget plan.
- Indicators for social well-being on the territory generated by the services of social co-operatives

Direct beneficiaries of the actions will be members and employees of the co-operatives who find themselves in management positions. In most cases, it is young women who are members of the respective co-operative who will profit from training. Through the foreseen activities, the three co-operatives forming the cluster will have the

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<sup>2</sup> **Coaching** is a process in which individuals or groups of persons help each other to realize specific objectives they could not reach on their own in a most effective way. They support each other in the establishment of a precise action plan and put at each other's disposal diverse instruments to implement this plan.

opportunity to acquire specific capacities regarding the development of their enterprise. Potential indirect beneficiaries will be the co-operative as such and, finally, the whole local community which will benefit from the provision of highly quality services.

Moreover, through the identification of a set of indicators relating to the social benefits generated by the activities of the co-operatives, the latter will be in a position to document the added non-economic value they produce. This might strengthen their position in negotiations regarding access to bank credits etc.

#### *Strengths and positive effects of the local activities*

The territory of Piacenza participated in the DESEO project with a local partnership composed of a local authority (Province of Piacenza), the social co-operative Ethos and the – CE.SVI.P. This partnership can be considered a rather consolidated one. Since several years, a close collaboration between these structures in the framework of local, national and European initiatives exists.

The significance and added value of this local partnership has to be stressed when referring to the strengths of local DESEO experimentation activities. Synergies created through the collaboration of these two social economy organisations with a local authority appear more than noteworthy: Each structure contributed with its own competences, specific functions and know-how to the realization of *common* objectives that are closely linked to the well-being and development of the whole local community.

Strengths in the creation of the cluster as such lie in the fact that all cluster components, i.e. the three co-operatives, among them Ethos, were already part of the consortium Sol.Co.Piacenza. They had thus already a certain experience in processes of mutualisation of resources and competences.

Another crucial key to success, which proves to be of importance in particular for small co-operatives, relates to the involvement of the Province and therewith to the visibility the latter could guarantee. The co-operatives have been in a position to create an example for a new methodology of cooperation and mutualisation. They have generated an experience that may serve as a model and seems worth to be disseminated on the territory in order to encourage experimentation among other enterprises (be they social economy or not).

Last, but not least, the support delivered by CE.SVI.P. enabled the co-operatives to participate in a grant application for co-financing that

would be necessary to realize the training modules. This co-financing could finally be obtained thanks to CE.SVI.P.'s competences and the Foncoop system, a specific fund for training activities in co-operatives. As has already been mentioned before, the initiative and its possible continuation represent a precious occasion for Piacenza's and other co-operatives to establish a methodology for the joint definition of objectives, a joint elaboration of common strategies and creation of synergies in the field of equal opportunities.

### Weaknesses

Critical points identified for the local cluster in Piacenza relate to two major issues:

1. Dimension and size of the co-operatives that constitute the cluster: the small structure of the three co-operatives and their limited number of members may lead to difficulties, as their managers are also often involved in the concrete realization of activities of the co-operative and might not be able to dedicate their whole working time to the management of the structure, or to the elaboration of development strategies.
2. Time: In order to prepare the ground for sustainable cluster activities, experimentation in Piacenza still needs to continue. Not all issues and problems related, for instance, to long-term financing and methods, could be settled in several months.

External factors that might create obstacles for the activities of the future cluster and their financing refer above all to questions such as the access to credit. It is always difficult to make other than economic values and impacts count when a decision on the granting of credit is taken by a credit institute.

Here, fortunately, financial instruments such as Foncoop exist within the major families of Italian co-operatives. Also smaller co-operatives have access to them and use them to invest in their development and growth. It seems thus of major importance to make possibilities to measure the "state of health" of a co-operative regarding its contribution to social well-being known to diverse local actors, in particular to enterprises and credit institutes.

In this respect, one should highlight the crucial role of major families of co-operatives and consortiums as well as of local authorities. All are in a position to widely disseminate, sensitize for and valorize the subject of access to credit for small enterprises.

### Perspectives

With the joint realization of training modules for (female) members and employees with managerial positions, DESEO partners hope to

increase equal opportunities in social economy and skills of its women employees. This would enable the involved co-operatives to operate on the market with best competences and abilities. Such a positive outcome might also foster access to credit of small co-operatives. Additional financing ensured by Foncoop will enable the DESEO partners to realize cluster activities at least for a certain period. External factors that could positively influence the continuation of the initiative are the following:

- a recognition of co-operatives, also of small size, as promoters of fundamental values and social well-being;
- a general recognition of the advantages of mutualisation between enterprises (be they social economy or not) as a modality for the optimization of existing resources;
- a valorization of mutualisation processes by local authorities: the latter could confer the management of their services to local social cooperatives which mutualise their means and competences with other (social) enterprises.

**CITY OF GRENOBLE/CIDFF (FR):  
CREATING A CENTRE OF RESOURCES  
FOR WOMEN ENTREPRENEURS**

*Definition of the general context  
and needs for action*

During the last 30 years, a major concern of associations and public authorities in Grenoble has been the (re-) integration of women into the labour market. Women of different ages still experience greater difficulties to find employment than men, in particular after having taken maternity leave. In this context, the creation of an independent, remunerative activity represents a valuable opportunity. Nowadays, in France, more than 50% of business starters with an own project are women. Even though less recognised on the labour market, competences and capacities women acquired during voluntary activities for their family or for an association are precious and have to be validated. Women that present business projects are less present in traditionally masculine professions such as construction. They are active most often in the field of (social) services or in commerce. Some of them follow a long dream which they decide to finally realise after fruitless search for work. They are willing to take risks for their personal passions. However, even though women represent 50% of those presenting a business project, less than 30% of enterprises are finally created by them. In comparison to men, women experience twofold difficulties: Within a couple, a woman's project should not lead to any "costs for the couple", be it in terms of time, attention or savings and other resources.

Public institutions have not yet tried to properly address these difficulties. Few among them have specific knowledge regarding the specificities of business creation by women, e.g. the duration of the process related to the establishment of the business, combination of work with family-related responsibilities etc.

For this reason, the CIDFF (Centre d'Information des Droits des Femmes de l'Isère) and the department for social economy of the city of Grenoble dedicate a part of their resources to the accompaniment of women on their way to business creation. Both assist the latter in assessing and validating a project, in the realisation of this project and in finding access to finance (through, for instance, the Guarantee Fund for Women Initiatives, local credit unions for women entrepreneurs etc.).

#### Specific objective of local activities and a possible future cluster

The objective of local DESEO experimentation activities has been to render already existing initiatives for women entrepreneurs more efficient. This happened by examining ways to go from mere networking of local actors to proper mutualisation processes for the establishment of a common virtual centre of resources.

This main objective includes sub-objectives such as the review of initiatives of a rather informal local network for women entrepreneurship which has been established in Grenoble in the nineties, its impact and concrete outcomes in terms of contents and resources.

The centre of resources would then bundle and coordinate the different experiences and resources and make them available to all members of the local network as well as to REVES members.

#### Partners involved and resources made available

DESEO activities in Grenoble were coordinated by the City of Grenoble and the CIDFF (Centre d'Information des Droits des Femmes).

A variety of local actors belonging to the above mentioned network has been involved in local experimentation activities and will contribute to the establishment and running of the centre.

Resources will be brought together as follows:

The city of Grenoble will deliver political, technical and financial support. Other partners such as the CIDFF, Pôles Initiatives Emploi, the Mission Locale, diverse associations, the chamber of commerce, business incubators, financial organisations (e.g. solidary and ethical finance), university (University Pierre Mendès France), different networks of women entrepreneurs and public offices working in the field of women entrepreneurship will provide their specific know-how, staff, documentation, IT resources, venues and other resources.

Additional local actors, in particular local authorities, were contacted in order to raise additional financing for the future centre.

Face to increasing shortcuts regarding public support and financing, the incentives for each partner to join the initiative were very much linked to the perceived advantages of a proper mutualisation of resources.

Moreover, all partners appreciated the prospect of a more regular exchange. The opportunity to share knowledge and expertise in the framework of a European initiative encouraged local actors to join discussions on the creation on the future cluster.

#### Activities of the future cluster

The future centre of resources will provide assistance to (future) women entrepreneurs in all phases of the establishment of their activities. According to appropriate competences and resources of the involved local actors, working groups have been established to pool necessary material and resources for each of the following fields:

- Orientation
- Information and awareness-raising (communication)
- Accompaniment/Technical assistance
- Creation of networks of future women entrepreneurs
- Financing
- Business incubators
- Evaluation
- Mutualisation of resources among different business starters

Among the very specific activities realised by the future centre figure:

- Creation, update and dissemination of a guide for business creation by women
- Facilitating access to financial instruments such as ethical finance, guarantee funds, loans to 0 % etc.
- Individual assistance and assistance in groups "from the idea to the project":
  - Individual accompaniment
  - Provision of information in groups (seminars etc.)
  - Training and Traineeships
- Provision of documentation and literature regarding economy in general, commerce, juridical matters, fiscal information ...
- Organisation of thematic workshops on issues such as work-life balance
- Providing links *to* and promoting initiatives *of* associations of women entrepreneurs and business starters

- Publication and dissemination of a directory of women entrepreneurs and business starters
- Creation and promotion of an umbrella structure allowing to engage business starters in the start-up phase of their project as employees
- Organisation of other events at local and regional level

Strategies and actions of the centre of resources will be based on a (partial) merging of the working programmes of the different partners.

The establishment and functioning of the centre of resources will be based on partnership agreements as well as on specific internal rules adopted by all partners.

#### Preparatory activities

As already mentioned beforehand, the experimentation phase and preparation of future cluster activities were coordinated by the DESEO project partners, i.e. the city of Grenoble and the CIDFF.

After a first mobilisation of different local actors and a mapping of resources and competences, a number of meetings between all interested stakeholders were held. In these meetings, participants discussed very specific needs and potentials. Finally, a strategy for mutualisation was set up.

In addition, the local partners were given a major opportunity to present their initiative, create new contacts and involve the public during a seminar, organised in the framework of a two days event entitled "Oser l'entreprise" ("Dare to establish your enterprise"). This event was arranged by the Chamber of Commerce Grenoble.

#### Strengths and positive effects of the experimentation activities

As in the case of other project partners, partners in Grenoble could build their experimentation activities and cluster design on an already existing network of local stakeholders.

Different kind of relations and cooperation between the different partners were thus already in place, even though some had lost dynamism, which the new DESEO initiative promised to revive.

Moreover, all stakeholders pursue in general a similar objective, i.e. the promotion of women entrepreneurship and assistance to female business starters.

It should also be stressed that activities were and still are based on the strong engagement of a department of the local authority, which recognises the advantages of processes of mutualisation with social objectives. This ensures a high visibility of the initiative, its integration into local networks and development processes as well as technical and financial support.

### Weaknesses and Threats

A major difficulty experienced by the partners lies in mentalities that still dominate the institutional environment when it comes to women entrepreneurship. Questions relating to the latter are still approached with caution and a certain suspicion even among politicians and administrators of the city of Grenoble.

Other obstacles to an efficient realisation of the clustering process relate to a certain competition among local stakeholders in the framework of a "race for public finances".

### Perspectives

The DESEO initiative enabled local actors in Grenoble to revive their network relations by testing a rather new form of cooperation: clustering for equal opportunities.

Partners recognised that a mutualisation of resources and competences among different local stakeholders might deliver a valid alternative of cooperation face to decreasing (financial) support of public authorities and/or possible changes in the attitude of the latter.

Activities launched by the DESEO project will thus continue. The centre of resources for women entrepreneurship and business starters is due to be established in 2008.

A recent initiative regarding the accompaniment of women entrepreneurs, taken by the University Pierre Mendès France, Grenoble, might allow to enlarge the local partnership and address a higher number of potential beneficiaries. For the moment, issues related to business creation in general are still less raised and addressed in universities (apart from commercial schools).

Finally, the local partnership hopes to develop and apply models for a mutualisation of resources *among different business-starters* so as to make them a basis for successful entrepreneurship and cooperation.

## COOMPANION (SE): PROMOTING EQUAL ACCESS TO CREDIT

### Definition of the general context and needs for action

Even though Scandinavian countries are often considered as being most progressive in promoting gender equality and equal opportunities, much remains to be done when it comes to the full implementation of favourable legislation and changes of mentalities.

This can be stated, for instance, with regard to women entrepreneurship. Here, obstacles become visible in particular concerning access to finance.

Investigations in Sweden show that female entrepreneurs are discriminated when applying for finance in order to realise their business ideas. Banks and other finance institutes tend to refuse credit even more often, when a woman wishes to set up business as a *social* entrepreneur.

The attributes "woman" and "social activity" carry thus both negative connotations that lead to negative consequences for both sides: Women have greater difficulties to access the labour market, to develop and realise their own ideas. Society, in turn, is losing great potential and resources generated by women during, for instance, their activities in (social) economy. Such behaviour is often due to a lack of knowledge and of capacities to assess the added value of women entrepreneurship and social economy, the causes of which may often be found in a rather 'masculine' economic system. Yet, women's business ideas are often different from those of men (which, from an economic perspective, should rather be a positive aspect) and women might present them in a different way.

Business advisers of credit institutes, however, are used to the masculine style and content of business ideas. Women often present projects in fields that are less addressed by men, e.g. in social services, care, commerce... Sometimes, these projects might not fit into the 'traditional' pattern of business, in particular if they are linked to innovative and creative aspects. In many cases, business advisers do not have any appropriate criteria or benchmarks at hand to judge these ideas. This might be linked to the aforementioned missing knowledge or methodologies, but also to stereotypes and specific mentalities. Male business advisers may be used to have certain services provided 'for free' by their wives, mothers and public services.

Discrimination does not necessarily happen consciously – advisers, credit counsellors and others might simply be unaware of it.

Another obstacle for women entrepreneurs lies in the fact that financial institutes advertise their services usually in a typically male context and fields of activities dominated by men.

Up until now, specific attention to aspects linked to gender equality is not considered a necessity.

#### *Specific objectives of (future) cluster activities*

The objective of local experimentation activities in Västra Götaland was to develop strategies and methods to improve the performance of an already existing cluster, a credit union (see below) so as to create opportunities for women to have equal access to finance and start-up companies in the social economy sector.

Through their initiative, partners also aimed to strengthen cooperation between social economy and local/regional authorities in the promotion of gender equality.

### Partners and Resources

DESEO experimentation activities in Västra Götaland were promoted by the DESEO partner Coompanion, a social cooperative, and carried out in the framework of the credit guarantee union for social entrepreneurs Västra Götaland (MGS). This cluster structure was established in 2006 by a broad range of social economy organisations, local cooperative development centres, consortia and (cooperative) banks in cooperation with the public sector, the Västra Götaland region. In total, 20 structures constitute and develop the MGS, which aims to counteract discrimination of social economy and social entrepreneurs when it comes to access to credit. Apart from pooling and provision of loans, training of credit counsellors on methods to assess business ideas in social economy as well as the elaboration of such methods and necessary indicators are considered crucial.

Each member organisation lends finances to the credit guarantee union and acts as an ambassador for the latter face to other local and regional stakeholders and citizens. However, members do not only provide loans, but also human resources and therewith diverse competences and knowledge. Banks, for instance, contribute with their expertise regarding finance and investment. Housing cooperatives may be referred to when questions linked to real estate arise. Three cooperative development agencies as well as the Västra Götaland region are involved in the activities with experts in the promotion of gender equality, social economy and local and regional development.

Partners either disposed of or have developed the capacity to assess business ideas linked to social economy activities.

MGS has the status of a non-profit organisation with an elected board and a chairman. Meetings are held on a regular basis. Decision-making processes among the members follow the principle "one member – one vote".

### Experimentation activities of the cluster

In order to improve access to credit for women entrepreneurs through the activities of the own credit union, the local DESEO partner (Coompanion), with the support of the Västra Götaland region, first of all arranged a number of meetings with the board of the credit union. Once the board agreed to support the experimentation activities, meetings with different cluster partners were organised with a view to make them aware of the difficulties women experience, needs for action and the potential of the credit union to improve the situation and its own performance.

Together with diverse social economy partners and social entrepreneurs, specific needs of women entrepreneurs were identified. Subsequently, Coompanion, in cooperation with other members of the

union, started to develop information material and specific training modules for credit counsellors. Moreover, further information activities among cluster members were carried out. The aim of these actions was to inform all parties about the specificities and socio-economic value of business areas developed by female social entrepreneurs, about the capacities and competences of women entrepreneurs and challenges they face in their professional and private life.

Based on these activities and the developed material, the partners wish to continue and deepen activities by drafting a manual and checklist for the assessment of business ideas. In addition, they plan to carry out training for credit counsellors and further awareness-raising activities.

To this purpose, possibilities to engage specific human resources and experts such as teachers or researchers were discussed.

#### Strengths and positive effects

Again, a major advantage and strength of the experimentation activities can be found in the existence of an already established cluster, in the framework of which new strategies for the promotion of equal opportunities could be developed and partially tested. The different cluster parties were already used to work together and mutualise resources with multi-fold objectives, linked to socially sustainable local development. Moreover, all members of the cluster recognise the existence of an added, non-economic value of social economy activities and the necessity to strengthen it. Finally, a strong relationship between diverse social economy actors, certain banks and local/regional authorities existed and served as a stable pillar for the realisation of local project activities.

In the course of experimentation, the board of the credit guarantee union decided that the promotion of gender equality should be mainstreamed and considered in all actions and documents of the cluster. Training of credit counsellors and business advisers has been listed as a major priority.

Beneficiaries of the services of the credit guarantee union will be strongly involved in the evaluation of final outputs and impacts of these actions. Aspects related to gender equality will be included in the index for customer satisfaction.

#### Weaknesses

Even though the initiative attracted the great interest of a number of local actors and even though the credit guarantee union could be involved, it remained still difficult to convince several members of the union and external organisations of the importance of gender equality. Some are not aware of the obstacles and degree of discrimination

women entrepreneurs in social economy experience, others still show fairly traditional patterns of thinking and stereotypes. Again others do not perceive the promotion of gender equality as a priority.

### Perspectives

Based on experiences and activities launched in the framework of DESEO, the cluster in Västra Götaland will continue to develop strategies fostering equal opportunities in social economy and credit systems.

The methodologies developed during the DESEO project will be disseminated and applied by Coompanion, Västra Götaland and other local actors while working with similar cluster structures, business support organisations and other credit guarantee unions.

Moreover, the cluster hopes to further strengthen cooperation between social economy and local authorities in the field of gender equality so as to raise awareness on its importance and mainstream related issues into all spheres of economy and society.

### CITY OF MODENA/LEGACCOOP MODENA (IT): MUTUALISATION FOR BETTER TRAINING AND MOBILITY OF FEMALE EMPLOYEES

#### Definition of the general context and needs for action

The job market is currently going through a period of

profound transformation. Changes include the diversification of job typologies and the various employment formulae adopted. A cyclical crisis with serious effects on the employment market at national and local level in the nineties, complicated the situation.

These developments are reflected in the policy choices taken by the city of Modena in order to support employment. Specific emphasis is laid on integration of work and training policies in order to develop dynamic and innovative solutions. In this context, the initiatives of the city of Modena focus on two main activities: a) monitoring the job market (job market observatory), and b) providing support to specific training actions.

With regard to these realities, two major problems could be identified by the local project partners:

1.) First of all, there is a need for training modules *for* and support *of* persons re-entering the labour market after long periods of absence due to family responsibilities such as parental leave.

Social economy is particularly concerned: Co-operatives providing social and health services, for instance, have a high percentage of female employees (90%) and frequently need to substitute employees on maternity leave. In the end of the maternity leave, in turn, it

is necessary to organise the women's return to work, which in many cases goes hand in hand with a request for flexible working hours. Furthermore, many women seek to prolong their leave, even after the maximum period of time foreseen by the law. Wage supplements may be paid by the co-operative, if the latter is economically strong enough to apply a management model aiming to promote loyalty of staff members. Also in this case, it remains indispensable to reintegrate the worker and meet her needs for flexible working hours remains. Other workers leave the workplace during the first year after childbirth, as they do not feel able to live up to the skills and knowledge required after their return. Training on the employee's return to work is clearly an important element which might help the worker to re-accommodate herself to the workplace, ideally to the same responsibilities, with respect for those who have carried out her tasks during her absence. The following figure confirms these necessities: One of the co-operatives involved in local DESEO project activities has an average of women on maternity leave of 70 out of approximately 1,000 employees.

2.) A second major problem identified by the partners relates to the fact that employees are faced with a lack of services to satisfy their needs linked to personal mobility. For some of them it is impossible to commute autonomously between home and work at certain times of the day or at night when public transport is not available. In a number of domains, it is women who face this problem. Appropriate services would be needed in particular for those on call for certain tasks which are often required on short notice, such as cultural mediation or services in a hospital.

Co-operative companies, for instance, which employ staff whose presence is required at special times of day (before 6am and up until 10pm) record high losses of staff members that are unwilling to accept these working hours due to the lack of available transport services. Surveys have shown that 11.4% of the persons employed are searching for a new job as they experience difficulties related to mobility. Some 19.7% of employees tried to negotiate, but have failed to obtain compromises in their work contracts, e.g. part-time or tele-commuting. This phenomenon concerns again above all women.

#### Specific objectives of the experimentation and future cluster activities

Face to the situation described above, Modena DESEO partners decided to concentrate their experimentation activities on two objectives:

- a. to work on possibilities to mutualise resources in order to train and tutor employees returning from parental leave and/or the persons replacing them;

- b. to examine the feasibility of creating a local cluster structure that would ensure the provision of services for a better mobility of employees of co-operatives operating in some of the key work centres: the *Ospedale Civile di Modena*, the *Policlinico di Modena* and the shopping centre *Grand'Emilia*.

#### Partners and future beneficiaries

DESEO partners that committed themselves to work on possibilities to develop clusters for equal opportunities on the Modena territory are Modena City Council and the Co-operative League of Modena (Legacoop Modena).

Modena City Council is a local government body employing more than 2,000 persons, among them a majority of women. An Equal Opportunities Committee works in tandem with the councillorship and gathers the proposals made by the various components of the committee with the aim of fostering a widespread culture of equal opportunities throughout the council and its policies.

The Provincial League of Co-operatives and Mutual Societies Modena (Legacoop Modena) represents and monitors co-operatives in Modena and surroundings. Thereby, it promotes the co-operative system and underlying values. Legacoop offers diverse services and expertise to member companies and supports the foundation of new co-operatives in a great variety of sectors.

Following the values and principles of cooperation, their members' quality of life represents a major reference point for the undertakings of Legacoop's member co-operatives. In this context, Legacoop members have a strong interest in valorizing social entrepreneurship and in developing solidarity between co-operatives with the aim of conceiving new forms of mutual aid in the achievement of the aforementioned goals. New and experimental approaches of cooperation such as common management systems are applied.

In the two fields of experimentation, activities involved a number of additional local actors, among them member co-operatives of Legacoop.

1. Regarding the conception of **shared training courses** to be established and used jointly by different co-operatives, the following co-operatives were implicated and might engage in common clustering activities:
  - a. Gulliver Cooperativa Sociale is a type-A social co-operative working in the field of community services. The company employs almost 1,000 workers, of whom 930 are partners and

almost 90% are women. More than 40% of the partner employees have part-time contracts; maternity leave represents at least 8% of all paid working days.

Since the co-operative's services area is considered to be one "exposed to risk", Italian labour law foresees compulsory maternity leave of 16 months during which the co-operative provides full pay, part of which is supplied by the INPS (National Public Welfare Institute).

- b. Aliante Cooperativa Sociale is both a type-B social co-operative (fostering integration of disadvantaged groups into the labour market) and a type-A social co-operative (social services and assistance). This company also records a high number of female partner employees, with long absence periods for maternity leave due to the risks linked to the co-operative's field of activity.

In the case of Aliante, problems of reconciling the workers' family and professional lives are further complicated by serious personal problems that many of the workers have, e.g. their being ex-alcoholics, drug addicts, ex-prisoners, psychiatric patients and/or disabled.

- c. Integra **Cooperativa** Sociale, a type-A social co-operative, is a small company with 20 partner employees of whom 60% are migrants and 70% are women, almost all of foreign origin. It provides services in different fields such as culture, education or healthcare.

The co-operative carries out cultural mediation activities in order to foster the social and professional integration of its members.

- 2. Concerning work on a future **cluster structure ensuring mobility of workers**, a number of service co-operatives operating in the healthcare sector as well as retailing co-operatives have been involved as potential cluster parties:

- a. CIR Cooperativa Italiana Ristorazione (Modena branch) is a co-operative with over 5,000 staff members operating in the food management sector.

- b. COOP Estense **Consumer Co-operative operates in retail distribution.**

- c. **Manutencoop Società Cooperativa** (Modena branch) offers a broad range of auxiliary services to public bodies, healthcare service providers as well as to large private groups and enterprises. Among its partner companies figures **Manutencoop Facility Management S.p.A.** which delivers services related

to integrated facility management as well as to maintenance and cleaning of buildings. **Manutencoop Servizi Ambientali S.p.A.** provides services related to the collection of both urban and hospital waste, street cleaning, the creation and management of recycling centres and related domains.

All of these structures employ persons with low levels of professional skills who carry out activities such as cleaning in hospitals or work as warehouse assistants and in other auxiliary positions. Among them figure a high number of non-European female employees. They mostly have very low incomes and are thus often not able to afford their own means of transport to commute between home and work. However, a considerable number of these employees hold jobs that often require shift work, with working hours lying outside the service schedules of public transport.

Given the very specific issue and objective of this experimentation activity, it seemed also vital to involve local actors operating in the transport sector:

- The *Agenzia per la Mobilità ed il Trasporto Pubblico Locale di Modena* (Local Public Transport Agency of Modena) was founded in 2001 following a legislative reform which aimed to open up the transport sector to the free market and ensure single and integrated mobility management. The agency was set up as a consortium by the Provincial Administration of Modena and the various local councils of the province. It is in charge of operational planning as well as monitoring of local public transport services throughout the province of Modena.
- Apart from the above mentioned agency have been associated the *Taxi Drivers' Consortium CoTaMO* as well as the *Cose Puri and SACA Bus Cooperatives*, which provide transport services established with private means of different dimensions and thus with differing costs.

#### Experimentation activities

Based on a collection of already existing data and information regarding major problems in equal opportunities on the Modena territory, additional interviews and surveys were carried out in Legacoop co-operatives so as to more clearly identify the needs of (female) employees regarding training and transport.

Subsequently, a number of meetings, coordinated by the city of Modena and Legacoop Modena were carried out to examine different scenarios and the feasibility of clustering in the two fields of experimentation.

1. With regard to training of employees returning from parental leave or replacing colleagues, the co-operatives Gulliver, Alicante and Integra already launched initiatives linked to the introduction of training measures *within their respective structures*. The objective of a number of meetings has been to find methods that would allow to mutualise competences and resources linked to these training activities so as to realise and use them jointly. Here, challenges relate above all to the question of appropriate methodologies and resources (see 'weaknesses'). A final solution could not be found by the end of the project.
2. Regarding the promotion of mobility of employees, the Agenzia Provinciale per la Mobilità, in cooperation with the other local actors involved, elaborated a hypothetical mobility management proposal. This proposal was based on a study carried out by the agency. It suggests an agreement between the co-operatives involved and the companies that manage the local public transport services, in which the operational aspects of the reorganisation of transport services for a specific category of employees are defined. It seems noteworthy that these operational aspects are also strongly linked to the objective to give workers incentives to use public transport in general:  
Different forms of economic incentives will be provided to those signing the agreement. They might include, for instance, the offer to purchase an annual nominal season ticket which would keep daily travel costs at 60 cents maximum. Workers would also be given the possibility of payment in monthly instalments which might be deducted directly from their pay package.  
Moreover, free collective transport services for employees might be provided. They would be designed to cover those hours of the day in which other public transport services are not available. Workers who become partners of the initiative and purchase a season ticket would have access to these services, which will be arranged in collaboration with employers and the institutions in which the specific employees deliver services (hospitals, shopping centres etc.). The services will be designed taking into account the functional accessibility of the areas in which the workers live. Transport timetables will guarantee the workers' punctual arrival at the workplace.  
These potential future cluster activities make thus a financial contribution by employers, employees and price-related concessions by the involved transport service providers necessary.

#### Strengths and positive effects of the experimentation activities

An already existent and long-lasting local partnership between differ-

ent social economy structures and the local authority presented also in Modena a positive basis for the experimentation of new forms of cooperation based on a mutualisation of resources.

Furthermore, Legacoop Modena and its members already disposed of a certain expertise and experiences regarding clustering and mutualisation of resources. They could thus deliver precious input and technical know-how.

In addition, similarities in the objectives of all involved actors in Modena cannot be underestimated. Both social economy as well as local authority do not focus on economic outcomes only, but have the common aim of promoting the well-being of inhabitants in general. This is a major requirement and condition to successfully test and realise clustering processes for equal opportunities.

Finally, the general context, i.e. the support provided by public institutions in the field of employment and equal opportunities is of key importance. Here, the Province plays a specific role in the management of the employment sector. It has broadened the range of employment-related services. Moreover, it lends support to specific projects of companies aiming to provide the training opportunities necessary to improve workers' skills, to encourage part-time and distance work etc. National legislation foresees the financing of projects for the reorganisation of work models which today are extremely inflexible and closely bound to production.

#### Weaknesses

Difficulties regarding both fields of experimentation are linked to a large extent to the availability of financial resources. This might jeopardise the final implementation of the planned cluster activities, since the services are addressing persons with low incomes, i.e. persons who are unlikely to pay more than a basic fee. The municipality will not be able to counterbalance financial gaps. It is therefore necessary to involve other actors who might be willing to mutualise financing for the implementation of an appropriate transport service.

As far as training after parental leave is concerned, the main challenge for Modena actors is still to find appropriate *methods* to systemise resources and use them in the most rational manner possible. This necessity arises in particular when training projects are mutualised between enterprises working in *different* sectors and with *different* individuals. In this case, future cluster partners will be confronted with notable differences regarding training needs, which might lead to a rise in costs beyond the financial capacities of the companies and their cluster.

## Perspectives

### **1. Training**

Research carried out in the companies involved shows that there is a high interest to work in collaboration with the Modena City Council and other subjects such as CESVIP and *Modena Formazione* in order to jointly set up innovative or experimental training modules, similar to those tested by the co-operatives Gulliver and Aliante. It seems most appropriate to establish one-to-one training courses, which would partially involve the co-operatives' staff. Modena partners will continue work on this issue also in the future.

### **2. Promoting mobility**

Companies operating in the field of maintenance, cleaning and social community services recognised that they have a lot to gain from finding formulae that would help to solve mobility problems by methods such as cost-sharing and other types of mutualisation. The investments to be written off due to a very high rate of losses of staff, and costs which companies have to deal with in order to replace leaving employees (new recruitment, training etc.) are immense. Were these resources reallocated in order to guarantee transport at costs affordable for the workers, the outcome may well prove to be of great advantage for both subjects.

For the Modena partners it is thus of utmost importance to continue with the examination of the various elements in order to reach a concrete cluster proposal and its implementation.

It might be possible to base these activities on "operational protocols" between the employer and the service providers. Another option would be the establishment of "temporary purpose associations" by the co-operatives in order to guarantee the provision of specific transport services and an efficient use of means of transport (smaller vehicles for smaller groups etc.). Both scenarios would allow testing the success of new forms of collaboration – such as clusters for transport – and their sustainability.

Know-how and expertise developed and/or consolidated during the DESEO project will ensure that companies do not have to invest in further research and planning activities, but may start straight from the implementation of the necessary actions.

All in all, it appears useful to (partially) integrate, into these activities, other related local initiatives and programmes, which might also deliver additional resources.

The reconciliation and welfare policies implemented by the local council cannot but overlap with the DESEO proposals.

It would thus be crucial to spread the information about all these activities to a largest possible extent so as to adapt and implement different cluster designs with a large number of local actors.

Regarding the transport proposal, for instance, it may be possible to present a collective project to the regional government. In the light of the innovative nature of the proposed actions, the authority may provide the financial backing, as it did already with other mobility projects.

**ADELIE/CITY OF DUNKERQUE (FR):** Definition of the general context and needs for action  
**MUTUALISING INITIATIVES FOR**  
**EQUAL EMPLOYMENT OPPORTUNITIES** Despite favourable legislation and other measures promoting gender

equality, adopted in France in recent years, women still do not enjoy the same opportunities as men in fields such as employment, vocational training, access to management positions etc. This situation is not only contestable from a gender equality point of view. It also entails significant economic problems. With a decreasing active population, it is, for instance, indispensable to ensure a high female employment rate. This also requires the promotion and implementation of other appropriate measures related to subject matters such as work-life balance.

On the Dunkerque territory, diverse local actors have been realising, over years, a number of actions against the discrimination of women at the workplace. The first woman to drive a bus in France worked for the public transport services in Dunkerque. Moreover, it seems worth to note that wives of seamen, living in the region, have always been forced to take on jobs in order to make ends meet.

Since the establishment of heavy industry in the metropolitan area of Dunkerque, women experience much greater difficulties to integrate themselves in the labour market. Jobs on offer are often particularly risky for the workers' health, physically demanding and therefore in general allocated to men. The unemployment rate of women in the area remains alarming.

In education and training, young women are rather orientated towards traditional 'female professions', i.e. (social) services.

Moreover, in Dunkerque, as in other regions of Europe, women rarely hold management positions in larger enterprises. Approximately 30% work half-time (in comparison to 5% of men), which is often due to childcare responsibilities and a lack of opportunities to reconcile employment and family life. Flexible working time models and appropriate, affordable childcare services are missing.

### Specific objective of the experimentation activities

Taking into account the variety of the aforementioned problems and their interconnection, local experimentation activities in Dunkerque aimed to bring together initiatives that are realised on the territory in a rather uncoordinated and overlapping manner. Concrete objectives are to:

- better identify and define obstacles to the integration of women into the labour market,
- create meeting places and regular possibilities for exchange between diverse local stakeholders and
- coordinate and merge action programmes with a view to launch joint initiatives based on a mutualisation of resources.

Final long-term objective of the initiative is to set-up a structure similar to the centre of resources that will be established in Grenoble, with a specific focus on women and employment.

### Partners

DESEO actions in Dunkerque have been promoted and coordinated by the association ADELIE as well as by the city of Dunkerque.

In the course of the experimentation activities, both structures managed to associate a number of diverse local stakeholders. Among the latter can be found social economy organisations promoting equal opportunities (SEDIR, CIDFF, AJS "Le bon Emploi de la Solidarité"), a training centre specialised in the subject matter (CORIF – Collectif Régional pour l'Information et la Formation des Femmes), organisations promoting employment in particular of disadvantaged groups (Entreprendre Ensemble, Maison d'Emploi), local enterprises (Chamber of commerce and industry, "Club des Elles de l'Industrie"), local authorities (city of Dunkerque, Communauté Urbaine de Dunkerque) and state authorities (Direction Régionale des Droits des Femmes).

### Preparatory Activities

Cluster development in Dunkerque was preceded by the conception of specific instruments promoting awareness-raising on the situation of women and training of professionals working in the field of gender equality, vocational training and employment.

These activities as well as a number of meetings allowed to more clearly identify potential cluster parties, to more strongly connect these stakeholders and to conceive a proper plan for the functioning and management of the future cluster:

Cluster activities will be coordinated by a steering committee composed of representatives of all actors involved, a specific full-time coordinator as well as thematic working groups that will prepare the different initiatives of the future cluster.

Mutualisation of expertise and information as well as a merging of action programmes of the different cluster parties will form the basis of all following joint initiatives.

#### Activities of the future cluster

Once a concrete plan for the mutualisation of resources has been set up and the availability of all necessary resources has been ensured, the future cluster will carry out different activities linked to gender equality in employment and training such as:

- pooling existing expertise, data and other relevant information so as to make it accessible to all cluster parties and beneficiaries;
- conception and realisation of training regarding gender equality addressing professionals and other relevant stakeholders or individuals;
- elaboration and realisation of a survey among women focusing on technical and other skills of the latter (results will be used as a basis for training and awareness-raising);
- elaboration and realisation of a survey among enterprises in traditional 'male' sectors of employment with the objective to find out about real employment opportunities for women;
- elaboration and dissemination of information material encouraging women to discover traditional 'male' sectors of employment;
- actions to encourage employers in Dunkerque to employ (young) women in the production sector as well as to promote, with appropriate initiatives, their professional development;
- examine specific problems of (female) workers' in the industrial sector and propose appropriate solutions;
- promote exchange and mutual tutoring among (young) women who are already working in the industrial sector or might envisage the latter and
- organisation of conferences, seminars and other events.

#### Competences and resources

Apart from co-financing the initiative, the future cluster parties will contribute to the planned activities with diverse expertise and other resources.

ADELIE will make available additional available human resources to ensure or support coordination activities.

The city of Dunkerque might put office space as well as other technical equipment at the disposal of the cluster.

Administrative support, also in terms of human resources, might come from the Communauté Urbaine de Dunkerque.

A variety of experts (social workers, trainers, researchers, psycholo-

gists, lawyers etc.), working *for* or *with* associations such as AJS, SEDIRE or CIDFF, could provide their services to the cluster.

Direct contacts to future employers or sponsoring enterprises might be established with the help of the Chamber of Commerce and Industry Dunkerque, which got involved into the initiative.

Training structures such as the CORIF are in a position to deliver specific expertise regarding training activities. CORIF might take over specific responsibilities related to the conception, organisation and realisation of training modules and awareness-raising.

Finally, it should be stressed that all these actors have their *specific* knowledge on realities of women on the Dunkerque territory. Some of them might offer expertise regarding migrant women, others might be specialised regarding specific age groups etc. ...

#### Strengths and positive effects

A major strength of the Dunkerque partnership and its initiatives lies in the diversity of actors the DESEO partners could mobilise. Different fields such as training, employment or awareness-raising were brought together. In addition, different perspectives and knowledge about specific target groups enriched the discussions. Not all involved actors were used to work together – a formal network of different local organisations promoting gender equality and equal opportunities did not exist before.

Some of the organisations involved pursue very similar activities. To them, the idea to create a cluster and therewith synergies, instead of entering in competition, was fairly appealing.

The support of local politicians and administrators in the experimentation process represents a major asset and enhanced the visibility of the project on the Dunkerque territory. Here, ADELIE and other associations could build on already established work relationships with the local authority, which already in the past proved to be fairly open to the associative sector.

#### Weaknesses

Likewise local DESEO activities on other territories, Dunkerque partners could not completely solve questions related to the (continuous) provision of all resources that would be necessary to realise planned actions. This problem emerged in particular with respect to possibilities of financing the structure that will be in charge of coordination of the cluster.

Moreover, even though cooperation between the partners became fairly animated, it will take some time to consolidate this partnership. During the experimentation activities, it has not always been easy to bring all interested partners together on a regular basis.

Moreover, upcoming local elections in France partially impeded a regular participation of interested politicians and the local administration. At the same time, the interest and strong involvement of local politicians could also lead to difficulties, as it might cause dependence of the cluster on the good will of the former (which, in turn, might impact on finances, contents of the initiative etc.). Possible changes regarding the local government or local administration have to be anticipated.

### Perspectives

DESEO partners in Dunkerque hope to strengthen the established cooperation of diverse local actors also after the end of the European DESEO project with a view of implementing planned cluster activities. The experimentation phase demonstrated advantages and positive effects of a closer collaboration in comparison with hitherto rather uncoordinated, overlapping initiatives. In the course of the discussions, a mutualisation of resources appeared to many local actors a valid alternative to a complete dependence *on* and competition *face to* public financing.

With regard to the problem of financing, the local partners still pursue their research and lobbying activities vis-à-vis public authorities or other organisations providing relevant support through programmes and other instruments.

After the establishment of the cluster, the cluster parties will seek to associate other neighbouring cities as well as regional authorities such as the Conseil Régional and the Conseil Général.

At a later stage, other actors such as bodies linked to the national education system, trade unions or public employment agencies may get involved.

In the long run, the cluster might become a main interface for local and regional authorities when it comes to the conception of policies promoting the employment of women.

CARBERY HOUSING ASSOCIATION/WEST CORK  
LEADER CO-OPERATIVE SOCIETY LTD./CORK  
COUNTY DEVELOPMENT BOARD (IR):  
BUILDING SUPPORT TO SOCIAL ECONOMY  
PROMOTERS OF EQUAL OPPORTUNITIES

### Definition of the general context and needs for action

Cork County, like other regions in Ireland and Europe, has undergone

major changes in its economy and social structures. The historical reliance of the region on the agricultural sector and the declining role of agriculture as economic activity led to a decline in productivity, jobs and incomes over the past 50 years, and to the outward migration of local people.

Ireland's accession to the European Union and a more dynamic economic policy has notably changed the region over the past 10 years. Thanks to a more aggressive development strategy, it has succeeded in diversifying its economic activities into areas such as small scale manufacture and tourism, including holiday homes. These changes, in turn, have precipitated land and house price inflation, and consequent rise in the cost of essential products and services, without an equivalent increase in jobs and incomes. Because of this, a large proportion of households have found themselves unable to meet basic needs (such as housing, childcare and recreation) on the open market. Among the groups that are most affected by these changes are women, especially single women and single parents, who often also face considerable difficulties in finding jobs, affordable housing and childcare.

These problems are compounded by the absence of a comprehensive safety net of affordable social, cultural and environmental support measures that could compensate for the limitations of the open market. In this context, persons with average incomes tend to find opportunities for local training, employment and enterprise limited by what is available on the market.

This in our view creates a deficit in equality of opportunities, which is the result of an overall reliance on the private sector and the market to satisfy the mainstream social, environmental and cultural needs of the region. In practise many essential products and services are not available at affordable cost to a large proportion of citizens, unless they are provided by the state agencies and subsidised. But the quantity (and sometimes the quality) of subsidised provision tends to be limited, and access to it conditional on eligibility.

Faced with these conditions, Cork DESEO partners have identified the development of the social economy sector as a vital balancing factor for gender equality in employment and the provision of essential services. Moreover, a strong and innovative social enterprise sector would be a valuable ally for the local authority in promoting regional development and social inclusion.

#### *Specific objective of the experimentation activities*

During their experimentation activities, Cork partners were confronted with a number of additional obstacles that could not be found – at least to that extent – on other DESEO partner territories.

Different forms of collaboration between different social economy

organisations, but above all between social economy and local authorities, hardly exist.

Moreover, in the case of Cork County, the social economy is not recognised as a vital sector in promoting equal opportunities. This means there is little territorial support for the sector.

In order to successfully address issues such as the mutualisation of resources and clustering of social enterprises, it seemed necessary to first of all carry out major awareness-raising activities and create a hitherto not existing network of social economy actors.

Specific objectives of the local experimentation activities in Cork were thus to:

- identify, document and promote the role of social economy enterprises in the region, in particular the role of these enterprises as a valid alternative in fostering equality of opportunities between genders and other sections of the community,
- create networking opportunities amongst social entrepreneurs, enterprises and the agencies responsible for regional development with a view to identifying possible alliances for equal opportunities,
- help develop effective instruments of support and financing for social enterprises and entrepreneurs promoting equal opportunities based on methods such as clustering.

#### *Partners, competences and resources*

Experimentation activities were co-ordinated, promoted and realised by DESEO partners Carbery Housing Association (CHA), Cork County Development Board (CCDB) and West Cork LEADER Co-operative Society Ltd. (WCLC).

Carbery Housing Association operates in the field of sustainable social housing and associated amenities. CHA contributed and will contribute to the local activities with human resources, financing, expertise and use of office equipment and premises.

Cork County Development Board is a local authority body dealing with regional integrated development, including community development. CCDB delivered precious input to the local experimentation activities by means such as an existing data base of all community organisations in the region and direct contact with their organisers. CCDB is part of Cork County Council, which has access to finance for community initiatives, land and buildings that could be used by social enterprises. CCDB is in a position to provide expertise of community officers working with a variety of community development projects in the region as well as of other skilled persons such as planners, architects, engineers etc.

West Cork LEADER Co-operative is a local development partnership

dealing with rural development. At present it promotes rural development, but it will soon be merged into an expanded West Cork Development Partnership with additional responsibility for the regional social inclusion programme. WCLC is responsible for a number of grant and support programmes that could support the social economy. It could contribute to future cluster activities with the expertise of its community officers working with a variety of local development projects in the region.

During the project activities, other agencies and organisations have participated in the activities and might join the initiative:

Clann Credo (CC) a social investment fund that supports social enterprises and other community initiatives with loan funding in circumstances where commercial banks would not be willing to do so. Social enterprises arising from any future (cluster) activities would require at some stage loan funding that Clann Credo could make available. Cork partners are also looking at the possibility of Clann Credo channelling EIB funding to such initiatives. In addition to providing loan funding, CC has the expertise to carry out financial assessments of enterprises, their business plans and their funding proposals.

Cork Environmental Forum (CEF) is a regional membership body that promotes local agenda 21 and other (environmental) objectives. It has an extensive database of community and agency contacts. Moreover, it is experienced in making use of media in the pursuit of its activities. CEF is particularly skilled at the organising of an infrastructure of groups throughout the region and the arrangement of promotional events and seminars.

Social Entrepreneurs Ireland (SEI) Network is a national charity that provides financial support from private donations to social entrepreneurs. It has also promoted a national Network of social entrepreneurs. SEI and its Network participated in the organisation of the Cork Seminar (see following sub-chapter). This co-operation is expected to continue in future. Social Entrepreneurs in Cork County will be able to bid for funding support from SEI from 2008 onwards. SEI's expertise, data base and contacts, and in particular their experience in management of public relations campaigns and contacts with donor agencies, would be of great value to any future regional clustering and support of social enterprises.

West Cork Craft and Design Guild (WCCDG) is a regional membership body that brings together individual craft persons in West Cork, orga-

nises joint activities and provides its members with access to funding and resources. WCCDG is able to link the craft sector to the social enterprise sector. The craft sector is a good example of alternative economic development. WCCDG is aiming to set-up a central craft centre in West Cork, which will provide a mutualised resource for individual craftpersons, and might be available to other social enterprises for specific events and activities. The Guild also has experience of organisation of events and media contacts.

The main shared objective among all the partners presented beforehand is the development of the social economy as an instrument for meeting unmet needs, and creating jobs and training opportunities for its members. The different partners have arrived at this aim from different directions – some have the overall interest of the region in mind, others are interested in specific aspects of life in this community, such as regional rural development, employment, housing and environmental sustainability or the development of craft and design. But all converge in the conviction that equal opportunities in these areas could be developed through social economy enterprises. Potential future beneficiaries were involved in the project from the start (e.g. Carbery Housing Association).

#### Experimentation activities

Local experimentation activities in Cork started with a review of research on the regional social economy, including a survey among local social enterprises.

Approximately 100 social enterprises were identified in the West Cork area from records held by Cork County Development Board. These were all sent a questionnaire and asked to answer a number of questions as well as to give their views on ways in which their and other enterprises' work on equal opportunities could be supported. After this, local meetings were held with local social enterprises. Other partners joined the local partnership as a result of these exchanges. Key local agencies were invited to participate in the monthly meetings of the Cork DESEO local partners; key *regional* agencies could be involved in the activities, as well.

An important means to further enlarge the partnership, constitute a local network and make the DESEO initiative known to the public represented a seminar organised in Cork on 26.11.07. This event brought together 55 delegates of social enterprises, (public) agencies, local authorities as well as interested individuals. A number of presentations from different social enterprises were given. Moreover, participants were given the opportunity to exchange and deliver their input for the continuation of local DESEO activities (e.g. response to

the Cork County Development Plan review). As a result of this exchange, representatives of Clann Credo, West Cork Craft and Design Guild and Cork Environmental Forum also joined the local steering group of the DESEO initiative. A first “core” of a future network and, possibly, cluster could thus be established.

#### *Strengths and positive effects of the local activities*

With their experimentation activities Cork partners clearly managed to first of all clarify meaning and role of the social enterprise sector in their local authority areas and the region. Through regular meetings, the seminar and ongoing communication within the networks of each local partner, important awareness-raising activities were realised. Key agencies involved in rural and social enterprise development as well as a number of active social economy enterprises were associated.

Partnership between Carbery Housing Association, West Cork LEADER Co-operative and the Cork County Development Board enabled the partners to have access to a diversity of contacts, and information. Staff of all three structures has been willing to invest their time in the initiative and undertake important networking activities.

Through the association of other interested local organisations to the DESEO initiative, a variety of competences and resources has been made available from different partners, including community organisation databases, design and layout skills, general project management skills, dissemination and publicity, handling media enquiries, offices etc.

With their dissemination activities and meetings, the Cork partners managed to launch hitherto non-existing network activities and closer co-operation between different stakeholders at local and regional level. They created a kind of ‘hardcore’ of what could later become a cluster.

#### *Weaknesses*

Unlike other European DESEO partners, the Cork partnership, in its activities, has been confronted with a lack of local networking among social economy enterprises, but also and above all with a low level of awareness and commitment to support this sector on the part of public authorities.

At the end of the DESEO project it was still not certain whether the different agencies represented in the local DESEO partnership will maintain commitment to any follow-on project or initiative resulting from DESEO:

Cork County Council operates on the basis of strategic priorities, which are defined periodically and reviewed regularly. Although the County has been prepared to participate in DESEO, the activities that

are proposed by the Project for the future by the project currently have not been integrated into the County's strategic priorities. This may, however, change over the course of the months that follow the end of the DESEO project.

The local partnership decided to make a submission of proposals to the County under the framework of the revision of the County Development Plan, which had to be submitted by the end of February 2008. The Partners hope that this will guarantee continued commitment by the County to the DESEO proposals regarding the social economy, which will require a pro-active decision and priority given to these activities.

Likewise, West Cork LEADER Co-operative has been willing to participate in the DESEO project to date. However, it has not officially adopted the proposals made by the DESEO initiative for continuing support of the social economy. WCLC is currently undergoing a merger with West Cork Community Partnership in order to produce a combined development agency responsible for both rural development and social inclusion in the region. Even though this would open new horizons for the continuation of the local DESEO initiative, this will have to be proposed and adopted by the new board and management of the West Cork Development Partnership.

The continued support of Cork County Council and West Cork Development Partnership would probably be required to ensure effective support of the social economy sector as promoter of equal opportunities in the region.

However, it would be probably safe to say that Carbery Housing Association, Clann Credo and Cork Environmental Forum are fully committed on a long-term basis to the short and longer term objectives proposed by the DESEO Project. This is because the promotion of social enterprise, and actions related to the promotion of equal opportunities by them, forms part of the long-term agenda of these bodies.

### *Perspectives*

With the potential economic downturn of the Irish economy it is possible that problems of social exclusion and lack of access to jobs and services will increase during the coming years.

As a result of this, communities are likely to turn once again to social economy as a way of meeting their needs and that of a growing proportion of the population. This should reflect itself in stronger support for social enterprise initiatives, and consequently in the creation of more effective instruments to promote them.

Cork DESEO has proposed to seize the time and to anticipate these developments, but also to address the present and ongoing need for

social economy as major promoter of equal opportunities, by striving for a more comprehensive strategy towards social enterprises on the part of regional agencies. In particular Cork County Council, together with the other key stakeholders, could promote some form of social enterprise support agency. The agency would elaborate and implement a promotion programme for local social enterprises. It should be able to support the development of specific initiatives, in terms of providing assistance with feasibility studies and business plans. Moreover, the agency would provide necessary contacts with regional and national statutory bodies as well as support agencies and facilitate access to long-term loan finance.

The participation and support of other stakeholders will probably be needed to make this a reality. The Cork DESEO partnership will therefore try to further strengthen co-operation between local social enterprises, agencies and other organisations.

A major opportunity for the Cork partners to pursue aforementioned objectives will be the submission of a comprehensive response to the Cork County Development Plan Review taking place at the beginning of 2008. Emphasis will be laid on the potential role of social enterprises in regional development and social inclusion strategies. This response will be completed by the end of February 2008. The partners hope that this input into the plan would result in the definition of a strategy towards the social enterprise sector, which could also be made part of the implementation of the Integrated Strategy for Economic, Social and Cultural Development of County Cork (2002-2011).

The decision of Cork County Council and the West Cork Development Partnership with respect to future support of the initiatives proposed would be decisive to whether or not they go ahead. Since the beginning of the project, Cork partners have made efforts to establish and maintain a dialogue with the agencies that they believe are keys to effecting the changes proposed. They will continue doing their best to make the case, to both Cork County Council and to West Cork Development Partnership, about the importance of supporting the initiatives.

## CONCLUSIONS AND RECOMMENDATIONS

Outcomes of DESEO experimentation activities on the partner territories clearly demonstrate the great potential of clustering when it comes to the promotion of equal opportunities and socially sustainable local development. All involved partners recognised its value and highlighted the need to continue experimentation and realisation of clusters. At the same time, DESEO examples show that much remains to be done to overcome obstacles in the realisation of such new and much stronger forms of cooperation between different local stakeholders.

Cooperation based on a mutualisation of resources goes beyond mere networking processes. It requires the full commitment of all future partners to a jointly defined common objective. Partners have to be convinced of the utility of the initiative. Due to similar interests related to socially sustainable local development, social economy organisations and local authorities might find it easier to identify such common objectives than other local actors.

Methodology and objective of the cluster process should ensure that each cluster party may contribute with its own competences and strengths while continuing to pursue mission and objectives of the own organization.

Moreover, clustering processes touch on systems of power, as a mutualisation of resources necessitates joint decision-making and a balanced allocation of responsibilities. Relations of trust between the different cluster parties have to be established and consolidated beforehand. Traditional patterns of thinking need to be changed. This necessitates time, i.e. a period of dialogue and negotiation, which

might often be time consuming. DESEO experimentation has shown that, despite the short project period, some public and private partners have been able to establish a closer cooperation “at-eye-level”. Dialogue has to continue, of course, also after establishment of the cluster. All future cluster parties need to be involved on a regular basis and more deeply than it is often the case in pure networking relationships.

In this context, the involvement of already existing local partnerships is of advantage. Networking has thus to be considered as a *basis* for the realization of a cluster process. In some cases, members of a local network may perceive clustering as a major opportunity to revive the dynamics of their relationships.

In a number of cases, a proper mutualisation of resources in specific fields may be easier to realize between stakeholders operating in the same (economic) sector. Here, similar and therewith complementary objectives, needs, activities and resources might facilitate clustering processes. Mutualising strategies and resources might enable the different cluster parties to conceive better target-oriented services.

In other situations, face to more complex problems or target groups, it might be more advantageous to involve a broad number of different local actors with diverse competences and resources. Local housing providers and transport companies, for example, could contribute with their expertise, adapted services and resources to cluster processes fostering equal opportunities. Yet, even though the participation of actors representing a large number of different domains and groups in society may be positive, clustering should focus on a very specific area of intervention. DESEO partners, for instance, have been working on clustering in the field of training, entrepreneurship, access to finance etc. Without a specific focus, actions might rapidly become uncoordinated and supported by only some cluster parties. They risk not following the common objectives any more; conflicts of interest may arise.

Both scenarios – clustering among similar actors as well as clustering with a diversity of stakeholders – require an intense mapping of resources as well as the development of appropriate methods to mutualise these resources.

A major challenge and crucial key of success for a cluster promoting equal opportunities, however, is its sustainability in terms of resources. Even though it seems desirable to have local authorities involved in cluster activities, the initiative should finally not be *dependent* on public financing and other ad-hoc financial instruments. In the opinion of the DESEO partnership, clustering for equal opportunities

should be perceived as an opportunity to create new forms of local cooperation and alliances. Processes of mutualisation should focus on resources that *already exist* among the diverse actors. They should lead to a more effective use of these resources, i.e. the creation of synergies also in financial terms. Clustering should be considered as an opportunity to find a way out of problems that emerge with the continuous withdrawal of the public sector from social initiatives and an increasingly competitive race for public financing.

All in all, the DESEO project could highlight that processes of mutualisation of resources, based on appropriate methods and planning, will generate synergies among different actors and therefore contribute to the well-being of a territory as a whole. Through a more effective use of existing resources and burden-sharing between different stakeholders, new means of action will emerge. Thereby, clustering also becomes an important key of success for the implementation of local plans for sustainable development, equal opportunities and diverse other programs or territorial strategies.

Consequently, in order to successfully realise these new forms of local cooperation and mutualisation, the legal framework and other context-related aspects have to be adapted.

Local and national governments as well as European institutions have a major role to play in shaping the general context. The following recommendations, based on the outcome of DESEO test activities, should thus be taken into consideration:

### **General recognition of the added value of clustering with social objectives**

Clustering with social objectives is a fairly new concept that needs to be further developed and promoted at all levels of society and by all actors. Local and national governments should recognize the great potential that lies in processes of mutualisation such as they have been proposed by the DESEO partners. They add value to the traditional concept of clustering which focuses above all on economic objectives and interests of the cluster partners. Of particular importance is their democracy-oriented cluster philosophy, promoted by social economy and other actors.

Moreover, the prospect of new local initiatives for social inclusion that would be based most and foremost on resources of their own partners can only be welcomed by local, national and European authorities.

The new cluster concept should be brought in when developing awareness-raising initiatives and programs in different fields and on diverse issues such as, for instance, entrepreneurship and Corporate Social Responsibility, anti-discrimination or partnership. Organisations and actors in the social economy sector, in turn, should be open to cooperation with other traditional enterprises and the public sector.

### **Adaptation of the legislative framework**

Legislation and resulting measures that relate to issues such as public-private partnerships, promotion of equal opportunities, entrepreneurship or public procurement should be adapted in order to provide better conditions and incentives for cluster creation. Local authorities, for instance, could promote services, based on clustering processes, when allocating public contracts. Clustering with social objectives may be made an award criterion in the public tender, to give just one example.

Nevertheless, sometimes legislative texts *as such* do not need to be adapted. They might already provide a range of opportunities to promote social values in clustering processes. Local authorities, however, might not feel in a position to rightly interpret these rules. Clarifications need to be delivered. This might happen through the publication of guidelines for the concrete implementation of relevant legislation, by means of specifically organised seminars for local administrators etc. It might be interesting, for instance, to integrate the subject of clustering with social objectives into seminars for local authorities on quality criteria in public procurement, such as they have been announced by the Commission for the upcoming years.

### **Promoting other forms of cooperation and mutualisation of resources**

Territorial Pacts, Consortiums or SCICs already deliver precious good practice examples regarding a mutualisation of resources of social economy, local authorities and other local actors with more than purely economic objectives.

Their experimentation in other cities and regions might encourage local stakeholders to intensify network relationships and experiment clustering themselves.

So far, examples for these forms of cooperation exist only in some

member states. However, territorial pacts found their successful continuation beyond the period in which they were financed by the European Community. SCICs are still fairly young, but start being set-up and tested by an increasing number of local stakeholders in France.

It seems thus worth to spread information on these forms of collaboration throughout Europe so as to encourage local authorities and other local actors to follow these examples for local partnerships. Networks of clusters pursuing social objectives should be promoted. They might ensure the establishment of a European pool of expertise regarding clustering with added value. Moreover, they would be in a position to continuously validate and disseminate European minimum standards and models for clustering in domains such as equal opportunities.

### **Recognition and promotion of social economy and other solidarity-based initiatives**

Social economy has an important role to play in the experimentation and realization of clustering for equal opportunities and related forms of local cooperation with added social value such as SCICs or territorial pacts.

Activities of a social economy structure are very much based on mutualisation processes among its own members. Principles of cooperation and burden-sharing most often predominate over purely competitive attitudes and profit-thinking.

In addition, different forms of cooperation between diverse social economy actors, based on a mutualisation of resources, already exist. They also paved the way for the development of other solidarity-based (social economy) initiatives such as credit guarantee unions, funds etc.

Due to its community-oriented interests and multifold objectives, linked to different aspects of sustainable local development, social economy could already prove its capacity to build alliances with other local actors such as local authorities, small and medium enterprises or citizens' initiatives.

It is therefore crucial that social economy be recognized by local, national and European actors as an important social and economic actor, as well as a motor and test bed of innovative initiatives such as clustering for equal opportunities. Not only bigger structures, but also social economy enterprises of small size should obtain a greater visibility as promoters of fundamental values, cooperation and social well-being.

Related measures should also go hand in hand with dissemination of information *on* and promotion *of* solidarity-based financing. The latter may, not at least, constitute an important pillar of cluster initiatives for equal opportunities.

### **Increasing visibility of new forms of local cooperation**

An important contribution of local, national and European institutions in the promotion of (social economy) clusters for equal opportunities and similar forms of cooperation is to give them the largest possible visibility. The experience of DESEO partners has shown that these kind of actions are indispensable when it comes to consolidate the future cluster partnership, but also and above all when additional partners and resources have to be found.

Even though they might be in a position to provide valuable expertise in clustering processes, smaller cluster structures may find it hard to carry out intense awareness-raising activities and reach potential partners. Local authorities, for instance, could make available more efficient means of communication, but also better communication channels and a wider network of contacts. Thereby, they would also ensure the precious contribution of smaller (social economy) enterprises and organisations to local development processes.

### **Integration of clustering initiatives in local policies and programmes**

Experience of several DESEO partners has proven that cluster processes are most probable to be launched and maintained if they are integrated to the largest possible extent in action programmes of other local actors as well as in other local key policies and strategies.

Local authorities, while conceiving and realising local development strategies, gender equality plans or strategies for social inclusion and equal opportunities should take cluster initiatives with related objectives into account.

Cluster partnerships might be consulted, for instance, in the programming phase of relevant strategies. Moreover, they should play an important role in the implementation process by delivering their expertise and services.

Hereby, visibility and sustainability of cluster processes will be increased. Moreover, local actors have the opportunity to ensure that

medium term and long-term objectives of the cluster are in coherence with general objectives of local development and vice versa. In this context, it seems once again crucial to stress that cluster structures should become a natural part of processes of local decision-making and effective implementation of political strategies. Cluster processes and policies will reinforce each other. Costly overlaps will be prevented. Democracy will be strengthened. Thereby, the clustering process will once more prove to be a win-win game for all parts of the local community.

### **Promotion of a new culture of cooperation and governance**

Mutualisation processes go far beyond mere networking. They require a stronger commitment from all involved parties as well as a higher willingness to share not only resources, but also (decision making) competences.

Nowadays, 'competition' is a widely spread term used to describe the supposed key to success regarding economic growth. All too often, however, competitive behaviour may also destroy social and economic resources and compromise the construction of synergies. In this context, artificial dichotomies have been created that oppose public and private actors, but also private actors among themselves.

Face to these developments it seems necessary to create and promote a new culture of cooperation, in which diverse stakeholders have the same rights and obligations. This will require a re-allocation of responsibilities among the different actors and the establishment of joint decision-making procedures. Here, it is of major importance that all involved organizations develop respect for each other.

Private actors, including social economy, might take over additional responsibilities and tasks for the local community. Local clusters for equal opportunities, for instance, might raise, among their members, a major part of resources needed to establish specific initiatives and services. Therewith, they will discharge public authorities. However, social economy and other actors will only be able to successfully carry out new tasks and maintain partnerships, if they are given the opportunity to shape the framework of their activities. They have to be more strongly involved in planning and evaluation of local policies and other initiatives.

Alternative methods of participation of local actors, such as they are currently promoted in the framework of the TSR® – Territorial Social Responsibility process, could be introduced and tested on local territories.

Decision-making in social economy structures or on territories with strong partnerships between social economy, local authorities and other actors might serve as an example for alternative systems of governance.

### **Technical training of local authorities, entrepreneurs and other local actors**

Awareness-raising and information activities on new concepts of local cooperation, including clustering, are important, but might not be sufficient to ensure a proper test and application of these concepts on different territories.

Local actors wishing to discuss and set-up clustering processes themselves will most probably need more specific information and guidelines regarding very technical aspects of mutualising resources and cooperation in general.

First of all, information on already existing good practice examples of clustering for equal opportunities and similar initiatives has to be pooled. Specific training measures could be conceived and realised by organisations that have successfully established clustering processes. Local authorities are in a position to support, by different means, the realisation of such training, which might address local administrators, private enterprises and diverse other structures. They might promote training processes by a) disseminating information and raising the visibility of these initiatives, b) making their own experts such as lawyers available to discuss with participants, c) providing venues, d) co-financing trainers, or simply by e) encouraging their own administrators to take part.

### **Allying universities**

Universities should, wherever possible and appropriate, be involved in programmes promoting the establishment of new forms of clusters such as clusters for equal opportunities.

On one hand, researchers might deliver a precious contribution to the development of appropriate methods for local clustering with social objectives.

On the other hand, social economy universities and other academic institutions should be encouraged to more deeply integrate issues linked to cooperation, (social) entrepreneurship and cluster creation in their own curricula.

## Changing patterns of thinking in economy and society

Respect of all the aforementioned recommendations would probably not lead to expected results, if actions to promote new ways of local cooperation and mutualisation would not also *raise the awareness of different actors on the real need to create equal opportunities*.

Public authorities, social economy, private companies, academics and other stakeholders, including each single inhabitant should be able to understand the social, cultural and economic value of an equal participation of women and men in different spheres of life. Shortcomings have to be better highlighted, alternatives need to be shown.

Campaigns and political discourses might not be enough. Awareness-raising should be practice-related and happen in actions.

To give just two examples: A very useful exercise, envisaged by DESEO partners in Dunkerque are surveys among employers whose enterprises operate in what is perceived as traditionally masculine sectors. The outcome of these surveys might show in a number of cases the important contribution women may deliver in these sectors. Education and training, addressing men and (young) women of all ages could more strongly build on these findings and try to re-orient patterns of thinking. Girls and women should be given stronger incentives to find out about their own capacities while discovering 'male' professions and activities.

Another good practice that should be quoted in this context are the efforts of the Credit Guarantee Union in Västra Götaland to introduce equal opportunities training and a checklist for its business advisers and credit counsellors. These actions ensure that equal opportunities are not only issue of discussions, but also applied in practice.

Local and national governments as well as EU decision-makers should take this into account while developing relevant legislation and foster an active implementation of equal opportunities throughout all areas of society and economy.

Activities promoted during the year of equal opportunities may be useful, but not sufficient if deeper changes of mentalities are to be achieved.

## ANNEX: DESEO PARTNERS

**The Provincial Administration of Piacenza** has developed cultural and institutional activities to guarantee an always greater and more punctual presence and valorisation of women in the decisional places of the institutions and of the local associate-economic reality, in order to recognize to the feminine presence its role in the government of the community. In the framework of its consultative activities regarding business creation and employment, it works closely with a variety of different social economy enterprises and other local actors. The Province disposes thus of a large pool of experience and a wide network for experimentation. **[www.provincia.piacenza.it](http://www.provincia.piacenza.it)**

**CE.SVI.P.** (Italy) is considered as one of the most advanced centre for research and training in northern Italy. It is in particular engaged in supporting social economy enterprises and local authorities and has already been active in various projects promoting gender equality. In collaboration with the Province of Piacenza and ETHOS, CE.SVI.P. contributes to the project with its expertise in business creation, cooperation and development of tools facilitating women's participation in different aspects of local development. Moreover, CE.SVI.P. uses its large network (collaboration with different social economy operators, municipalities etc.) for experimentation and dissemination. **[www.cesvip.it](http://www.cesvip.it)**

**ETHOS** is a social economy organisation aiming to enhance social development, equal opportunities and to promote extended participation and access to economic and social local life. The professionals of Ethos accrued a large experience in promoting –both in local

authorities and in social economy organisations – equal opportunities and gender equality through their research and consulting activities. **[www.ethoscoop.it](http://www.ethoscoop.it)**

In **the city of Modena** the promotion of gender equality is one of its major concerns. Disposing of a wide network of collaboration with social economy enterprises and other local actors, the city is experimenting new tools fostering gender equality as basis of local development. The city of Modena disposes of important expertise regarding services and tools that promote an equal participation of women and men in social and economic life at local level (innovate childcare systems etc.). **[www.comune.modena.it](http://www.comune.modena.it)**

**Lega Provinciale Cooperative e Mutue Modena** has a long experience in supporting business creation, cooperation and solidarity in the cooperative sector all across Italy. It provides important expertise in the field of clustering within the social economy sector. The special interest of this partner is to develop new models of cooperation between smaller and big social economy enterprises. **[www.modena.legacoop.it](http://www.modena.legacoop.it)**

In the framework of its support to the development and experimentation of new strategies regarding local development, social economy and issues such as gender equality, **ADELIE** takes part in the project together with the **city of Dunkerque**. Both actors are strongly interested in transnational exchange regarding the issue of cluster processes and gender equality. Within REVES, they have also been involved in different actions related to the promotion and application of gender equality.

**CEPS** serves as a tool to develop public policies for territorial development, relevant topics such as gender equality have to be taken into account. CEPS has participated in gender programmes regarding reconciliation of family and working life and deepened these topics to enhance its capacity of developing and implementing programmes at local level. CEPS operates within an important network at local level, encompassing local authorities, social economy organisations, civil society and other local actors. **[www.asceps.org](http://www.asceps.org)**

**The city of Messina** participates in the project with the objective to strengthen gender equality on its territory by working on specific aspects linked to clustering and local economic development. It is especially interested to develop, experiment and apply, in cooperation with other local actors such social economy, new actions and models of (financial) business support to women. **[www.comune.messina.it](http://www.comune.messina.it)**

Having a high expertise in different issues linked to social economy, business creation and local development, the **Piattaforma per l'Economia Sociale dell'Area dello Stretto** participates in the project together with the city of Messina. With its participation it aims to experiment models of clustering linked in particular to new forms of business support to women such as micro-credit. Moreover, the Piattaforma hopes to enhance a local culture supporting local development, gender equality and social economy activities at different levels. Its network will significantly contribute to the dissemination of new concepts/values/benchmarks as project outputs.

Since 1995 the **city of Grenoble**, together with a wide range of other local actors such as social economy, works actively on issues related to gender equality. Different initiatives such as the creation of a common fund for the assistance to socio-economic or cultural activities young people (in particular young women) have been developed. The city is strongly interested to deepen its activities by experimenting the design of clusters facilitating equal access of women and men to economic and social life. It appreciates in particular the opportunity of exchange with other territories and actors from different national realities. **[www.ville-grenoble.fr](http://www.ville-grenoble.fr)**

**The Centre d'Information des Droits des Femmes de l'Isère (CIDFF)** pursues activities linked to information on and assistance to (social) business creation by women as well as business support in general. It develops and disseminates innovative tools regarding, for instance, financing (CLEFE). Moreover, its work focuses very much on awareness-raising. The CIDFF collaborates with a large network of different local actors, including municipalities such as the city of Grenoble or other social economy operators. In the framework of this project, it will contribute with its expertise and ideas. Together with the city of Grenoble, the CIDFF will then provide a large test-bed for project results on its territory and ensure a wide dissemination of the project outcome.

**Carbery Housing Association** is committed to develop (gender) equality, knowledge and participation within its clients, members and staff, in particular as relates to the design, development, building and management of habitat – a specific social economy branch. It has also a high experience in developing and running vocational training for prospective residents and the public. CHA aims to provide its expertise to the project activities. Moreover, it has the objective to more strongly develop gender equality in all areas of its activities and models of cooperation with other local actors. **[www.carberyhousing.eu](http://www.carberyhousing.eu)**

In the course of project activities, **West Cork Leader Co-operative Society Ltd.** and the **Cork County Development Board** joined the local project partnership in Cork. Both of them are main players regarding the promotion of local development and social cohesion in West Cork.

Coompanion is a co-operative development agency which promotes co-operative development and business development in the social economy as a whole. DESEO project activities and objectives are in coherence with **Coompanion's** own working priorities. The agency disposes of significant experiences in business support and cluster processes. In the framework of the project, Coompanion will provide in particular its expertise regarding financial aspects linked to gender equality and business support. It will carry out project activities together with affiliated social enterprises and envisages to also work towards a quality system or standard among social enterprises and members of Coompanion. **[www.coompanion.coop](http://www.coompanion.coop)**