



Eurofound

# Social innovation in service delivery: New partners and approaches

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# Executive summary

## Introduction

This report presents the findings of a research project exploring the involvement of new partners – in particular, the social partners, civil society and people in vulnerable situations – in social innovation. For the purposes of the research, ‘social innovation’ is defined as new ideas (products, services and models) that simultaneously resolve societal challenges, meet social needs and create new social relationships among the groups concerned. Social innovation can involve such aspects as new participation in decision-making, services affecting the social situation of specific target groups (provided commercially or not) and changes in social care systems. It is part of cultural development and societal change.

The research was carried out at EU level – focusing especially on the role of the European Social Fund (ESF) in social innovation – and in six Member States: Austria, Bulgaria, Ireland, Italy, Portugal and Sweden. It examined the innovation and social partnership culture in each country, and analysed to what extent national-level policies have been triggered by EU policy. The research also includes three case studies carried out in Ireland, Slovenia and Sweden, presenting initiatives that the social partners, or those in vulnerable situations, have been involved in designing and implementing.

The objective of this study is to inform, with an evidence-based approach, the policy debate on social innovation, and contribute to a better understanding of effective and sustainable processes. The study also aims to explore how social innovation can be most effectively supported in different phases: from initiation, through consistent delivery of good quality services, to identification of good practice.

## Policy context

The social and economic challenges of the 21st century require a new approach to the analysis and implementation of innovation in general, and of social innovation specifically. Social innovation is increasingly being seen as a way of compensating for the ineffectiveness of both the state and the economy in addressing not only deprivation, but greater challenges such as ageing societies and climate change. However, not every new way of tackling social challenges is social innovation: just as technical inventions are considered as innovations only when they become marketable, social innovation has to provide sustainable benefit for its users.

At present, social innovation is at the heart of the EU policy agenda. The European Union 2020 Growth Strategy makes explicit references to social innovation. Two of its most important initiatives are the ‘European platform against poverty and social exclusion’ and the ‘Innovation Union’.

Social innovation is increasingly seen as a tool to help achieve the key objectives set out by the European Commission in its Communication on the Social Investment Package, ‘Towards social investment for growth and cohesion’.

## Key findings of national-level programmes

The engagement of social partners and non-governmental organisations (NGOs) in the design and application of social innovation varies in the six countries studied, as does the understanding of its concept. The main areas of interest of the analysis were programmes and initiatives in the policy triangle of ‘employment – education – social policy’.

However, the majority of socially innovative programmes and initiatives are paid for by the ESF. This may be because these programmes fit into a common structure and are continuously monitored. Socially innovative projects do exist outside the scope of the ESF, but they are not usually branded as ‘social innovation’.

The social partners are – with a few exceptions – not familiar with the concept of social innovation. However, on an individual basis, some are engaged in setting up and promoting social innovations that improve conditions for marginalised groups, for example people outside the labour market.

NGOs often carry out social innovations, although their engagement in the design of programmes is mainly informal, with the civil society or voluntary sector having no formal involvement in the ESF at EU level.

Those working in the voluntary sector generally associate the idea of social innovation with the ESF, particularly in relation to working with vulnerable groups. Those who represent employers' organisations mainly connect it with the concept of 'social entrepreneurship'.

### Case study findings and policy pointers

**Relevance of definition** – None of the case studies was preoccupied with, or even aware of, the definition of social innovation. Social innovation as such was not the driver or the starting point for establishing the initiative. This is in line with the findings of the analysis carried out in the six countries, which implied that initiatives with a direct reference to social innovation can be found mostly within the framework of the ESF. Given the broad definition of the term, many different projects can be considered as social innovation.

**Responses to the challenge/issues** – The common thread for the individual projects is that they are responding to local challenges rather than fitting into a larger scheme. This would imply that an environment could be created that facilitates more of such bottom-up initiatives, addressing issues that have not yet reached top-level decision-makers.

**Reliance on individuals** – The commitment and enthusiasm of the people involved in establishing and running the programmes were found to be crucial. However, this reliance on particular individuals can weaken the sustainability of the project, should the management change. Strong links with other stakeholders and structures could give these individuals the support they need, helping to establish a stronger foundation and a longer life for these projects.

**Sustainability** – Being a part of a larger, more structured framework can help individual projects to be sustainable in the long term; however, a balance should be maintained to allow for the flexibility associated with small-scale activities.

**Engagement of stakeholders** – Due to the involvement of the different groups, there should be a better understanding of beneficiaries' needs. This cooperation will also help the expectations of both sides to become more realistic.

**Better evaluation** – While projects are increasingly required to include a set of targets, there seems to be a lack of focus on evaluating this properly in large-scale programmes. More needs to be done to ensure the systematic evaluation of these initiatives.

**Improving funding** – Many of the programmes operate on an ad hoc or project basis while at the same time trying to ensure a long-term impact. Provision of funding should follow a more predictable and sustainable route. In addition, new ways of securing additional private financing should be explored.

# Introduction

This report presents the findings of a study on a specific aspect of social innovation in the European Union: exploring whether and how new partners – particularly the social partners and people in vulnerable situations who are the beneficiaries of innovative services – are engaged in the process of social innovation across Europe. The project looked at how the involvement of these new partners is reflected in EU policy documents and in some initiatives at Member State level.

The research, commissioned by Eurofound and completed partly by the Centre for Social Innovation (ZSI) in Vienna and partly by Eurofound, was carried out both at EU level, focusing especially on the role of the European Social Fund (ESF) in social innovation, and at Member State level in six pre-selected countries – Austria, Bulgaria, Italy, Ireland, Poland and Sweden. Research examined the innovation and social partnership culture in each country, and analysed to what extent national-level policies have been triggered by EU policy. The research encompasses three case studies conducted in Ireland, Slovenia and Sweden, presenting initiatives in which social partners or those in vulnerable situations have been involved in the social innovation process, in both the design and the implementation phase.

The objective of this exploratory study is to inform the policy debate on social innovation and contribute to a better understanding of effective and sustainable processes with an evidence-based approach. The study also aimed to examine how social innovation can be most effectively supported in its different phases, from initiation and consistent delivery of quality services, to identification of good practices in social innovation.





At present, social innovation is at the heart of the EU policy agenda. The European Union 2020 Growth Strategy makes explicit references to social innovation in its several priorities and key flagship initiatives. The two most important of these initiatives are the ‘European platform against poverty and social exclusion’ and the ‘Innovation Union’.

The ‘European platform against poverty and social exclusion: A European framework for social and territorial cohesion’ (COM(2010) 758 final), is an initiative that sets a framework for social and territorial cohesion and has become even more relevant since the onset of the economic crisis and its consequences for the most vulnerable members of society. The European Commission decided to focus on a number of actions and initiatives within this framework, one of which is the promotion of evidence-based social innovation. Even though the EU has been promoting social innovation and providing funds via the European Social Fund (ESF) for some time, it acknowledges that at the national level programmes often lack analysis and evaluation of what actually works best and how to upscale often small projects. One of the methods promoted by the European Commission as an appropriate tool to provide more evidence-based policies is the use of social experimentation, in other words small-scale projects that test policy innovation before they are adopted more widely. The European platform against poverty and social exclusion emphasises the need for a stronger partnership within the social economy. The European Commission is also calling for stronger involvement by the social partners, in addition to the traditional stakeholders – the policymakers at the national, regional and local level. However, involvement by the social partners has so far been limited to aspects relating to inclusion in the labour market. Finally, the Social Investment Package signals upcoming changes to the ESF, which is one of the most prominent tools the Commission has to promote a more innovative and participatory approach in the area of social innovation.

Another flagship initiative of the Europe 2020 strategy which refers strongly to social innovation is the ‘Innovation Union’, which aims to ‘improve framework conditions and access to finance for research and innovation so as to ensure that innovative ideas can be turned into products and services that create growth and jobs’. The Innovation Union recognises and emphasises the role of social innovation while acknowledging that, unlike work innovation for example, it is a relatively new field that needs to be further investigated and strengthened.

To a large extent the Innovation Union has a similar definition of social innovation to that used by the Bureau of European Policy Advisers (BEPA): social innovation is about ‘tapping into the ingenuity of charities, associations and social entrepreneurs to find new ways of meeting social needs which are not adequately met by the market or the public sector’. The Innovation Union emphasises the role and the importance of partnerships, saying that ‘major companies and SMEs in all sectors, including the public sector, the social economy and citizens themselves should be acting in partnership’. The process of social innovation in itself should empower people and establish new relationships and methods of cooperation. The Innovation Union pays considerable attention to the need for scaling up, dissemination and transferability of good practices and the need for better methods for evaluating what works (or does not work) and why.

The Innovation Union emphasises the implications of the so-called ‘world of work’, where employers and employees must ‘seek out new and better ways of doing things’. Importantly, the new cooperation paradigm must go beyond the traditional ‘knowledge sectors’. The example of the care sector is provided, where a ‘skilled, motivated and adaptable workforce is needed to provide high standards of care to the increasing numbers of older Europeans’.

Interestingly, the Innovation Union pays attention to innovation within the public sector, which is especially relevant at a time when some Member States are experiencing severe austerity measures and calls for reform to the public sector. It stresses the need for the EU to better understand innovation in the public sector, and the success factors behind good initiatives, as well as calling for more focus on increasing the management skills of public sector employees.

Social innovation is also seen as one of the tools that can assist in achieving key objectives set out in the European Commission Communication on the Social Investment Package: ‘Towards social investment for growth and cohesion’ (COM(2013) 83 final). These objectives include simplified and better targeted social policies, ensuring that social

protection systems respond to people's needs, and upgrading active inclusion strategies in the Member States. The concept of social innovation is seen as a tool not only to help modernise social policies, but also to emphasise and promote those that are most effective and efficient. The communication points to the need for an adequate framework in which social innovation can take place and the need for proper evaluation of social innovation activities. The ESF and its 2014–2020 financial framework will continue to be the EU's main financial instrument supporting the implementation of employment and social policy reforms undertaken by the Member States that are in line with Europe 2020 and the Social Investment Package. The new framework of the ESF will be adapted to reflect a greater emphasis on results orientation, ex-ante conditionality and the simplification of administrative processes. Social innovation is set to play a greater role within the ESF, together with the social economy, as an effective way to help to deliver the objectives of the Social Investment Package (European Commission, 2013). An interesting development is the growing support for policies that are more targeted, conditional and properly evaluated.

The current framework of the ESF has already spent considerable funds on projects that were labelled socially innovative. In general, funding allocated to social innovation in various Member States varies between 1% and 5% of the total ESF budget. However, the draft ESF Regulation for the period 2014–2020 contains new provisions to further strengthen the support for social innovation. The new framework will call for more work in the area of scaling up.

In academic circles a recent and policy-relevant development is the Vienna Declaration (2011), which describes the most relevant topics in social innovation research. This document is the result of discussions by over 300 participants (scholars and researchers) working in social science and humanities in Europe and beyond. The conclusions acknowledge that the challenges the world economies are facing will be impossible to deal with without major changes in social practices in all domains, including business, civil society and the state. As in the previous documents, the declaration admits that, until recently, social innovation has been largely overlooked as an 'independent phenomenon in socio-economic research on innovation ... and that it rarely appears as a specific and defined term with clearly delineated scope'.

Against this briefly described policy background, this report will make a direct contribution to a better understanding of how recipients and end users of programmes and initiatives, particularly those in situations of need and the social partners, are and were involved in the design and application of social innovation.

## Defining social innovation

For the purposes of this report, social innovation is defined in a broad context:

*Social innovations are new concepts and measures to resolve societal challenges, adopted and utilised by social groups concerned. Social innovations are innovations that are social in both their ends and their means. [They are] new ideas (products, services and models) that simultaneously meet social needs (more effectively than alternatives) and create new social relationships or collaborations. They are innovations that are not only good for society but also enhance society's capacity to act.*

This definition is strongly linked to the one used by the European Commission (BEPA, 2011).

Just as new products and processes become innovations only with success in markets, social innovations must generate lasting value for target groups. As part of social change, social innovations include services, rules, procedures and social practices that are more effective than comparable concepts. For an idea to become a social innovation, it needs to meet social demand, be effective in resolving an issue, and gain acceptance from those concerned. Beyond the resolution of particular needs, social innovations have an influence on the adaptation and development of various modes of governance. Individual behaviour may be subject to social innovation, as may corporate development, education

systems, teaching methods and learning, or social and other government services (for example, social security, pension and tax systems, health provision, and measures concerning the environment).

The social and economic challenges of the 21st century require a new approach to the analysis and implementation of innovation in general, and of social innovation specifically. This is because social innovation is increasingly being seen as a way of compensating for the shortcomings of both the state and the economy in addressing deprivation and major societal challenges such as ageing societies and climate change. Not every new way of attempting to tackle social challenges can be considered social innovation: just as technical inventions are considered as innovations only when they become marketable, social innovation has to provide sustainable benefit for its users. Whether it is new participation in decision-making, services affecting the social situation of specific target groups, provided commercially or not, or changes in social care systems, the application and spreading of a new social idea becomes a social innovation only if it actually contributes to the solution of a real problem or to the satisfaction of a (long-lasting or new) social need in society. In this sense, social innovation is part of cultural development and societal change.

There is a risk that the ‘social’ aspect of social innovation may be assumed to be synonymous with ‘good’, without asking ‘good for whom?’. It is essential that criteria are applied to identify a social outcome, comparable to the commercial outcome of successful market penetration by new products. And, most importantly, it must be fully appreciated that people are different and often have contradictory intentions and interest. What appears ‘social’ (beneficial) in one group, time, social stratum or region, may prove irrelevant or even unhelpful to others. Social innovations – just like any innovation – are not invariably ‘socially good’ to any of the social groupings or numbers of people affected; nor will they gain equal acceptance among the public. As with technological innovations, social innovations also generate winners and losers, and thus have supporters and opponents, which might lead to conflicts. These considerations are taken into account in this report.

BEPA (2011) describes social innovation as ‘innovations that are social in both their ends and their means’. Recent work, for example at the ZSI, takes into account issues of acceptance and diffusion of new practices by the groups concerned as a constitutive element, in the same way that the market success of technological or economic innovations must be taken into account. Social innovation is therefore understood as ‘new concepts and measures to solve social challenges, which are accepted and implemented by the societal groups concerned’ (ZSI, 2008). The process dimension of social innovation, relating to new forms of interaction, has to be distinguished from the output dimension. The latter ‘refers to the kind of value or output that innovation is expected to deliver: a value that is less concerned with mere profit, and including multiple dimensions of output measurement’ (BEPA, 2011). It can be described and analysed according to the ‘4-i process’ of social innovation, which applies to any innovation:

- idea (finding a methodology);
- intervention;
- (successful) implementation (or institutionalisation);
- impact (innovation and results).

Together, these four strands formulate a reference framework to assess and compare the relevance and diffusion of different initiatives. The 4-i process is discussed in detail in Annex 1 to this report.



# Hypotheses and methodology 3

Based on existing literature and the EU policy context, the research on the involvement of social partners and those in vulnerable situations had two initial hypotheses.

- Social partners were expected to be strongly involved in monitoring and advisory boards of EU-funded programmes, as recipients of funds, in particular at the regional and the local level, but rarely involved as beneficiaries/end users.
- Those in vulnerable situations were expected to be involved mainly as recipients/end users of social innovation, and rarely be involved in the design phase, monitoring and in structures such as advisory boards.

The research was carried out in three steps. First, desk research was completed and information gathered from experts in relation to the key research questions concerning, in particular, the ESF. Furthermore, research examined how the engagement with the new partners has been reflected upon and taken up in debates and developments at EU level.

Second, an analysis was conducted focusing on programmes that fall outside the scope of EU funding, following a flexible definition of social innovation as described above and gathering information on pathways to social innovation. This second step was based on six countries – Austria, Bulgaria, Italy, Ireland, Poland and Sweden. The analysis first looked at the programmes and policies in place for those in vulnerable situations, and then reviewed the engagement of the new partners – the social partners and non-governmental organisations (NGOs) – in relation to pathways to social innovation. Stakeholders in the respective countries, including social partners, NGOs and public authorities, were contacted by mail.

Third, three case studies were carried out to show examples of successful involvement of new partners in three different countries – Ireland, Slovenia and Sweden.

Under the scope of the definition described above, social innovations are found in all EU27 Member States and their subnational governance systems. Still, some countries (such as the UK and the Netherlands) promote social innovations in a more extensive form than others. However, choosing only the ‘most promising’ countries for mapping social innovation practices in the engagement of social partners would not provide a representative picture of the EU. The creation, development and diffusion of social innovation in a particular setting is heavily influenced by historical and cultural conditions; therefore, this study follows a balanced cultural and historical approach.

This becomes particularly important when looking at the involvement of social partners and those in vulnerable situations. Austria, Sweden and Ireland, for instance, have well-established social partnership systems in which the preconditions for the engagement of social partners in the design and application of social innovations supported by EU-funded actions are more likely to be met. Culture is a driving force for the engagement of actors and stakeholders (for example, civil society has a stronger role to play in the Nordic countries,<sup>1</sup> while active engagement of civil society in the design and delivery of programmes is more limited in central European countries). By ensuring a geographical balance, it is possible to map the involvement of partners across culturally and historically diverse countries.

In addition, there is considerable evidence for significant differences in the extent to which countries and regions are capable of fostering an ‘innovation culture’, which is to be understood as the values, traits or behaviours shared by the people within a community, region or country and which relate to behaviours and attitudes towards innovation. Path dependencies play a key role in practice, which partly explains the difficulties of transferring successful practices to a

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<sup>1</sup> An example of this is the Estonian Civil Society Development Concept (see EU Civil Society Contact Group, 2006).

different place or region. This study will take account of the Hofstede and Inglehart cross-cultural approaches (Cornford et al, 2006) to understand (national and regional) culture and its association with innovation-related behaviours.

The six countries chosen for the in-depth analyses and some brief characteristics are summarised in Table 1.

Table 1: *Overview of the six countries analysed*

Six core countries	Geographical location	Population size	Governance system, culture
<b>Austria</b>	Central Europe	Small	Federal system, one of the wealthiest countries in the world
<b>Bulgaria</b>	Southeastern Europe	Small	State with a high degree of political, administrative and economic centralisation, Latest accession country, historical crossroad for various civilisations
<b>Italy</b>	Southern Europe	Large	Strong advocate of European federalism, very high standard of living
<b>Ireland</b>	Northwest Europe	Small	Strong economic liberalism
<b>Poland</b>	Central and eastern Europe	Large	Most populous post-communist EU Member State, possesses cultural wealth, 'very high' ranking in terms of human development (according to the Human Development Index, HDI)
<b>Sweden</b>	Northern Europe	Large	Highly competitive country, lowest Gini coefficient of all countries of the world (most equal country in terms of income distribution)

These six European countries represent different economies and social models. Three large EU countries (Italy, Poland and Sweden) are included, as European policy in favour of social innovation will reach significant quantitative targets only if larger Member States follow corresponding objectives. Three smaller Member States (Austria, Bulgaria and Ireland) are included, as each of them offers insightful concepts in related issues. This choice of countries offers a geographical balance: a Nordic country (Sweden), a central European country (Austria), a southeastern European country (Bulgaria), a southern European country (Italy), a northwestern European country (Ireland) and an eastern European country (Poland). Bulgaria was selected as a country representing both the accession to the EU in 2004 and a different setting in terms of social innovation and policy issues. The chosen countries and their subnational governance systems show differences in their social and economic setting as well as in their social partnership and civil society dialogue culture, which is important for the key research questions to be answered.

## Case study framework

A 'critical friend' learning model was applied, which suggests that true learning requires assessment feedback that can best be given by 'a trusted person who asks provocative questions, provides data to be examined through another lens, and offers critique of a person's work as a friend' (Costa and Kallick, 1993). The importance of developing relationships of trust and mutual respect is central to the work of a critical friend. This work is critical because it propels those involved to improve and bring about necessary changes. Therefore, when asking critical questions during the case study visits, the 4-i model was used. This model suggests that there are four phases of innovation: idea, intervention, (successful) implementation (or institutionalisation) and impact.

The critical questions to be asked when visiting the partners during the on-the-spot visit were grouped according to the 4-i process of social innovation (see Annex 1). The case studies covered a broad range of services catering for various groups: integration of long-term unemployed people, stimulating social entrepreneurship and combating racism. They address three different aspects of the quality of life.

## Selection of the three case studies

### Case 1: UMA – Sweden

This case was selected as it fits the following criteria:

- local community-based project developed with and for people with multiple difficulties;
- implemented in a Nordic country.

The *Utveckling mot arbete* or UMA ('Development towards employment') is an ESF-funded project aimed at helping people far removed from the labour market through rehabilitating and motivating activities, complemented with work training. The target group for this project include long-term unemployed people and individuals on long-term sick leave within Stockholm County. Employers, authorities and representatives from the social economy are also considered a target population. The case is an interesting illustration of the bridge between the social economy and local development. It is a good example of how various local stakeholders – steered by social NGOs in this case – can be efficient at local level by developing innovative solutions for those in vulnerable situations.

### Case 2: Social Incubator – Slovenia

This case was selected as it fits the following criteria:

- social innovation developed initially with social partners (trade union association, student organisation and university);
- implemented in a southeastern country.

The Social Incubator is an initiative based in Ljubljana that was established by the Student Organisation of the University of Ljubljana (SOU of Ljubljana), the Association of Free Trade Unions of Slovenia and the Faculty of Social Science of Ljubljana University. The main objective of the project is to provide a platform where new social business ideas can be created, tested and implemented. The main target group are students and graduates of the university. It is an interesting case as it is a result of a collaboration by many different stakeholders united by the need to promote the idea of social entrepreneurship – a concept relatively new to the country.

### Case 3: 'Dublin's transport links – Racism divides', Anti-racism campaign, Ireland

This case was selected as it fits the following criteria:

- social innovation developed directly with and by social partners (employers) in response to a newly emerging issue;
- implemented in a northwestern country.

The project is an initiative by a multi-stakeholder coalition comprising local government, civil society and major transport employers (social partners) who came together to address the emerging issue of a number of incidents involving abuse of transport employees linked to their immigrant background.





## Social innovation in the ESF and EU policy documents

The ESF for the period 2007–2013 has encouraged Member States to promote and give prominence to innovative activities in projects co-funded by the ESF. While social innovation as an explicit concept is rarely mentioned in the programme, some of the operational programmes of the Member States (for example Bulgaria) have been making the reference more explicit while others, for example Sweden, used the call for proposals to promote social innovation.

The partnership principle is strongly embedded in the framework of the ESF 2007–2013, which explicitly encourages the inclusion of social partners (employers and trade unions) and NGOs in its funded projects. Their participation should take the form of partnerships at regional and local level, especially in the fields of labour market inclusion, social inclusion, gender equality and equal opportunities. The partnership principle is supported by a European Commission staff working document ‘The partnership principle in the implementation of the Common Strategic Framework Funds – elements for a European Code of Conduct on Partnership’ (European Commission, 2012d), and by a Communication on partnerships in the ESF (2011), which stressed the link between partnership and social innovation by recommending that ‘partnerships should be used to foster social innovation, stimulate change and mobilise reforms’.

Social innovation as a concept is more prominent and explicit in the proposal for the ESF 2014–2020, and the link between the funding stream and the socially innovative nature of programmes is stronger. This has been supported by inclusion of the concept in policy documents, most notably the Social Investment Package. It is likely that the concept of social innovation will be much more closely linked with the evaluation and assessment of the programmes in future.

The European Commission proposal for the Common Strategic Framework Funds (2014–2020) also seems to be driven by the need for a more consistent application of the partnership principle, calling for partnership with economic and social partners and in particular NGOs in areas such as environment, social inclusion and gender and equal opportunities.

Social partners are included in the structure of the ESF<sup>2</sup> through their participation in the ESF Committee, an advisory body of around 100 participants including government representatives, the ESF Managing Authorities and the social partners of the 27 EU Member States (EU27), as well as EU social partner umbrella organisations such as BUSINESSEUROPE and ETUC. However, civil society is not formally represented in the committee at present.

The issue of social innovation is not a central discussion topic in the committee, and whether the social partners take an active or passive role depends largely on personal engagement. While social partners as a group are not arguing either for or against social innovations, it does seem that this is because they are often not familiar with the concept.

## New partners in social innovation in the six selected countries

Projects involving social innovation that are co-financed by the ESF are easier to locate because of their involvement in a common structure and the fact that they are given a set framework that can be monitored and evaluated. Of the six countries in the focus of this report, Bulgaria was the only one that launched a specific social innovation programme as an explicit part of its ESF Operational Programme. Other countries promote social innovations mainly via their various priority axes within their operational programmes.

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<sup>2</sup> Other forums where discussions on social innovation in relation to the ESF may be held are the European Economic and Social Committee and the European Parliament.

In all six countries, the social partners act as members in the operational programmes' monitoring committees. As defined in the General Regulation of the ESF, social partners may also act as beneficiaries or intermediate bodies within the implementation process of the funds. Beneficiaries in ESF projects can be of many different types, such as NGOs and social partners active in the field of employment and social inclusion. Among the six countries, Bulgaria and Italy are addressing social partner issues most often in both absolute and relative terms (European Commission, 2010, p. 7). Overall, social partners are placed at the heart of the implementation of the ESF and perform multiple roles in the six countries.

Those in vulnerable situations are not involved directly in monitoring committees but are represented in them in some countries. Their level of engagement varies: in Austria, for instance, the umbrella organisation for socioeconomic enterprises is a permanent member of the ESF Monitoring Committee with voting rights, while in Bulgaria representatives of those in vulnerable situations are involved only as observers.

However, vulnerable groups are more explicitly addressed as a target group of the operational programmes. Data available on the current programmes (2007, 2008 and 2009) show that 18 million people have already benefited from ESF-supported interventions. Seventeen per cent of these participants belong to vulnerable groups including migrants, minorities, people with disabilities, Roma groups and former convicts (European Commission, 2010, p. 3).

Attempts were made to look at socially innovative projects outside the scope of EU funding in individual Member States. This proved to be quite challenging, although there are individual examples of projects involving social partners and those in vulnerable situations, as illustrated by the three case studies.

The next section outlines the involvement of social partners and civil society in socially innovative programmes.

Due to the different understanding of social innovation in various countries, the innovation and social partnership culture of the individual countries was included as a framework for the country studies. These sections make reference to the Innovation Union Scoreboard (IUS), a tool developed by the European Commission to compare the innovation performance and research and innovation systems of the EU27 Member States, while monitoring innovation trends.<sup>3</sup> The scoring is based on 25 indicators, mainly sourced from Eurostat.

Each country description is structured as follows:

- background on innovation and social partnership culture;
- engagement of the new partners in pathways to social innovation (with information provided on the social partners and NGOs);
- examples of pathways to social innovation (with information provided on the social partners and NGOs);
- conclusions.

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<sup>3</sup> <http://ec.europa.eu/enterprise/policies/innovation/facts-figures-analysis/innovation-scoreboard/>

## Austria

### Innovation and social partnership culture

Austria, ranking eighth on the Innovation Union Scoreboard (IUS), is close to the EU27 average, and is assigned to the country group ‘innovation followers’ (European Commission, 2012a). In March 2011, the Austrian government published the document *Research, technology and innovation strategy*, which became the major reference document for the development of research, technological development and innovation (RTDI) in Austria. This strategy includes a specific reference to social innovation with regard to activating the innovation potential: ‘We must adopt a broad approach to innovation that not only includes technological, research-driven and non-technological innovations in manufacturing and in the service sector but also ecological and social innovations as well as innovations in the public sector’ (Government of Austria, 2011, p. 24).

A growing interest in social innovation can also be observed at the Austrian regional levels (*Länder*): the Future Fund (*Zukunftsfonds*) of the Province of Styria, for instance, published a call for research proposals in the field of social innovation in October 2012.

Austria’s social partnership is a very special manifestation of social corporatism; a tripartite structure based on cooperation between the social partners, it is a highly institutionalised cooperation covering most matters of economic and social policy. The main employers’ organisations include the Federal Economic Chamber (WKÖ) and the Federation of Austrian Industry (IV). The employees’ organisations included are the Trade Union Federation (ÖGB) and the Chamber of Labour (AK).

### Engagement of the new partners in pathways to social innovation

The main social partners are members of the ESF Monitoring Committee in Austria, and they were also involved in the RTDI strategy mentioned above. They cannot act as recipients of the ESF programme, but are regarded as key actors with respect to Austria’s Territorial Employment Pacts (TEPs). TEPs are contracted regional partnerships set up to link employment policy more closely with other policies in order to improve the employment situation at regional and local levels. It is mainly through the TEPs that social partners influence the development of social innovations at national and regional levels. Their level of influence on ESF-related policies is low, but this varies across the regions.

Employers’ organisations are becoming increasingly interested in the concept of social innovation. This attention is related to the economic crisis, following which the Federal Economic Chamber intensified its work on structural change, deindustrialisation, future economic branches and social innovation in enterprises. The Chamber of Labour and the trade unions seem to be more critical with respect to social innovation, although their reservations mainly relate to the often uncertain benefit for their clients. However, the interests and needs of those in difficult situations are not the primary focus of the social partners.

NGOs play a key role in developing pathways to social innovation and are regarded as the most important drivers for social innovation for marginalised groups in Austria. At national level, NGOs are engaged in the ESF Monitoring Committee and also act as partners within the TEPs.

NGOs are usually not represented on decision-making programme boards but are often involved as advisory bodies.

At the regional and the local level, the partners of the TEPs co-funded by the ESF are engaged in the development and implementation of socially innovative actions. The main partners of the TEPs are the Austrian regional levels, the public employment services, the social partners and the Federal Social Welfare Office. The TEPs are established within the Employment Austria Operational Programme under priority 5 (cooperation structure) and priority 3b (integration of

marginalised groups). The latter priority aims at the development of innovative actions and has been offered to the TEPs since 2007–2008.

### Examples of pathways to social innovation

#### *Social partners*

The *Arbeit und Alter* (Work and Age) platform was established through cooperation between the social partners with the aim of securing and improving the productivity of older employees. The online platform provides information on demographic change with respect to the inclusion of older workers in the labour market, with good practice examples made available online. Advice is provided to companies on how to design workplaces appropriate to the age of their employees (for example, in the management of human resources development, the organisation of shift work and awareness-raising).

A similar concept is applied by *Arbeit und Behinderung* (Work and Disability). This website provides information on the employment of people with disabilities (including information on labour and social law) and funding possibilities. Best practice examples support the exchange of ideas and experiences. The project started in 2003 as an initiative of the Chamber of Labour and is now implemented in cooperation with all four main social partners plus public authorities and additional partners.

The social partners also cooperate with public authorities in respect of the NestorGOLD certificate, which is awarded to companies that promote solidarity between generations.

There are examples of initiatives by individual social partners. Some are implemented by employers' organisations, and many of these initiatives are related to the topic of diversity and equal opportunities in business. Examples include training provided to women interested in opening their own businesses and women already operating as sole traders, programmes on mentoring for migrants, and an award given to Viennese companies that have implemented measures to promote workforce diversity. The ageing workforce is another topic that interests employers' organisations, leading to social innovations in a broader sense, such as research studies and brochures for employers.

The trade unions are similarly interested in equal opportunities, and are involved in projects providing courses for women active in works councils, running counselling services, organising workshops and creating brochures for older employees and those with disabilities, and providing training material related to combating racism and discrimination in the workplace. They also publish reports on migration and participation in the labour market/education or on the improvement of social services. Trade unions are partners in the project Central European (CE) Knowledge Platform for an Ageing Society.

#### *NGOs/civil society*

The most prominent example of a project aimed at enhancing social innovation that is driven by an NGO is *SozialMarie*, an award given by a private foundation for socially innovative projects with the aim of making ideas known to the broader public and supporting networking between projects. In the past seven years 1,400 projects have participated in this award. The award is not limited to Austria, as it also includes projects from countries such as Hungary, the Czech Republic, Slovakia, Poland, Croatia, Slovenia and Germany.

### Conclusions

The Austrian European Social Fund Operational Programme is the main programme fostering socially innovative actions for vulnerable groups in Austria. The partnership structures of the Territorial Employment Pacts (TEPs) are core stakeholders at the regional level for developing and implementing joint innovative actions for vulnerable groups.

However, there are examples of activities run by individual civil society organisations and by social partners outside the scope of funding from the ESF. The activities implemented by the Austrian social partner organisations focus mainly on qualification activities or counselling services for people in vulnerable situations. Even though the cooperative projects do not address social innovation directly, some can be regarded as pathways to social innovation. NGOs, however, play a key role in developing ideas and are important drivers for social innovation for marginalised groups in Austria.

## Bulgaria

### Innovation and social partnership culture

Bulgaria was ranked 26th on the Innovation Union Scoreboard (IUS) in 2011, second last in the rank of EU27 countries (European Commission, 2012a). The country is in the group of ‘modest innovators’ together with Latvia, Lithuania and Romania.

The Bulgarian Employment Agency initiated a programme called ‘Social innovation in enterprises’ which started in 2011, with the aim of helping businesses to implement innovative strategies for human resource development under the Human Resources Development Operational Programme 2007–2013. The activities co-funded by the ESF focus on encouraging the introduction of flexible forms of employment (particularly for people aged 55+), developing plans for training and career development, and providing benefits for employees.

The National Council for Tripartite Cooperation is Bulgaria’s main social partnership organisation. It was established in 1993 as a body for cooperation and consultation over issues concerning labour, social security and living standards. The most important employers’ organisations include the Bulgarian Industrial Association – Union of the Bulgarian Business (BIA), the Bulgarian Chamber of Commerce and Industry (BCCI), the Union for Private Economic Enterprise (UPEE), and the Union of Private Bulgarian Entrepreneurs (UPBE). The employees’ organisations taken into account within this study are the Confederation of Labour Podkrepa (CL Podkrepa) and the Confederation of Independent Trade Unions in Bulgaria (CITUB).

### Engagement of the new partners in pathways to social innovation

Social partners are members of the ESF Monitoring Committee and beneficiaries under a considerable part of the ESF Operational Programme. In Bulgaria, social partners also act as end-users as the operational programme enables the strengthening of administrative capacity (labelled ‘institutional capacity building’) at national, regional and local levels.

Social innovation does not seem to be regarded as a priority for the social partners; their main activities include advising the government and sectoral collective bargaining.

The concept of social innovation itself is not yet ingrained in Bulgarian enterprises, which associate socially innovative projects with involvement in corporate social responsibility, examples of which include providing help to establish secondary schools, supporting universities and municipalities and building up ‘green’ NGOs.

Despite this, a growing interest can be observed regarding vocational training and associated investments: a number of projects are being implemented on behalf of the BIA. Cooperation between the Ministry of Labour and CITUB has been established to target discrimination. The BIA, moreover, cooperates with the Central Cooperative Union Bulgaria and other NGOs on various topics.

Marginalised groups are key target groups of the operational programme. They also benefit from improved framework conditions (such as the establishment of a network and models for interinstitutional cooperation and coordination). Members of civil society participate as observers in the sessions of the monitoring committee.

Bulgarian NGOs are interested in socially innovative measures, even though the term ‘social innovation’ is not often used. The Information Portal of Non-governmental Organisations in Bulgaria offers an informative overview of the NGO scene in Bulgaria and illustrates the efforts taken in various thematic fields.

The Bulgarian ESF Operational Programme was developed in accordance with the principle of wide representation and partnership (particularly involving social partners, academic circles and the non-government sector). It further states that ‘social and civil dialogue is being developed by increasing the opportunities of the social partners to influence the employment policy by broadening their participation in the social dialogue and establishment of functional interinstitutional relations between the partners on the labour market’ (Bulgaria ESF Operational Programme).

However, the model of cooperation between NGOs, the public authorities and social partners remains unclear. It seems to be comparatively weak and occurs only as the need arises. The same is true for the involvement of NGOs in programme planning. The impression is that NGOs are rarely included and that they do not focus on developing cooperation with social partners. They are, as stated by one stakeholder, ‘much more interested in cooperating with private donors and local companies’.

### Examples of pathways to social innovation

#### *Social partners*

A prominent socially innovative project, co-funded by the ESF and implemented jointly by employers’ organisations and trade unions, is the ‘Development of workforce competence assessment system by sectors and regions’.<sup>4</sup> The project aims to enhance the adaptability and effectiveness of the workforce, as well as to balance labour market demand and supply by developing and implementing an information system for workforce competence assessment by sector and region.

In May 2011, the BCCI, in cooperation with research institutions including the Academy of Sciences, the Agricultural Academy and the Technical University of Sofia, along with about 10 other universities, agreed to establish an Innovation Council. The aim of the council is to encourage innovative products and services and to support the link between science and business.

The BIA also develops and implements socially innovative activities in cooperation with the Ministry of Labour and CITUB on anti-discrimination and on the European Information and Consultation Directive (Directive 2002/14/EC).

#### *NGOs/civil society*

Junior Achievement Bulgaria is a prominent programme in the country, part of an international network. It provides entrepreneurship education for children and young people with the help of volunteer business advisers. As an example of an NGO and the private sector working together in the social innovation field, the programme includes an initiative called the Social Innovation Relay, a web-based learning programme encouraging young people to form teams and develop an innovative idea with a significant positive social impact.

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<sup>4</sup> The project is being implemented by the BIA, under the Operational Programme ‘Human Resources Development’ 2007–2013, co-financed by the ESF.

The Workshop for Civic Initiatives Foundation (WCIF) matches funds raised locally by community foundations (currently in 10 different towns in Bulgaria) for social innovation, which are mainly developed in the field of education, children and youth development, inclusion of marginalised groups, healthy living, environmental protection, preservation of the historical and cultural heritage, arts and culture. All projects must encourage civic participation and voluntarism, focusing on inclusion and equal treatment of disadvantaged groups. At the national level, WCIF supports philanthropy campaigns that are dedicated to social innovation, such as innovative ways to enhance social inclusion of vulnerable and discriminated groups (lesbian, gay, bisexual and transgender people, homeless people, ethnic minorities, children raised in care).

## Conclusions

NGOs are familiar with the development and implementation of socially innovative activities in Bulgaria. In addition, Bulgarian public authorities at the federal level seem to be interested and are engaged in setting up framework conditions for pathways to social innovation. Yet it seems that social innovation is focusing mainly on the world of work. The ‘Social innovation in enterprises’ programme of the Bulgarian Employment Agency creates opportunities for socially innovative activities in order to strengthen the situation of marginalised groups. Nevertheless, social innovation is not a priority for the social partners. Though encouraged by the ESF Operational Programme, cooperation between civil society, public authorities and social partners for pathways to social innovations seems to be limited to the project level.

## Italy

### Innovation and social partnership culture

The Innovation Union Scoreboard (IUS) 2011 ranked Italy 15th out of the 27 EU Member States (European Commission, 2012a). Accordingly, Italy is in the upper part of the ‘moderate innovators’ group and slightly below the EU average. The concept of social innovation is not very developed in Italy according to a recent report *Social innovation in Italy* by the Italian Social Innovation Network (I-SIN).

Many social innovation activities in Italy are business-oriented. During the past few years, the concept has gained in popularity among Italian multinationals, mainly from the banking and communication sector. Social innovation is seldom discussed at government level. Even though a legal framework for social enterprises was introduced some years ago, the number of such enterprises has not increased. While Italy has one of the largest numbers of social cooperatives in the world (Federsolidarietà, the largest Italian umbrella organisation for social co-ops, has almost 6,000 members), the country does not show a particularly active interest in social innovation in a broader sense.

Italy’s social partnership culture has traditionally followed a voluntaristic approach. Historically, social partners are strongly engaged in bipartite dialogue. Tripartite social dialogue at the national level tends to be held only on demand (for example, to discuss the critical economic situation, pressure to implement European guidelines or reduce budget deficits). The employers’ organisations linked to this study are the General Confederation of Italian Industry (Confindustria) and the Confederation of Small and Medium-sized Industry (Confapi). The most important employees’ organisations included in the study are the General Italian Confederation of Labour (CGIL), the Italian Confederation of Workers’ Trade Unions (CISL) and the Union of Italian Workers (UIL).

### Engagement of the new partners in pathways to social innovation

In Italy, social innovation is a topic at programme level although the term social innovation is rarely used for describing activities. The Italian ESF Operational Programme, for instance, is the result of a strong partnership between regions, social partners and the Ministry of Labour, Health and Social Policies and is targeted at improving the social inclusion of vulnerable groups.

Social partners are members of the ESF monitoring committees at national and regional levels. The monitoring committees include trade unions, employers' associations and NGOs or other representatives of the voluntary sector. Representatives of the economic and social partners are always involved, sometimes in an advisory role, at the regional level. In some regions the development of social partnership is one of the priorities of the ESF Operational Programme. Social partners may be eligible for ESF funding (the beneficiary designs a project, applies for funding and, if successful, implements the project). Often, trade unions and employers' organisations are linked to specific organisations involved in training and research. These entities can create projects and apply for funding.

NGOs are engaged in programme planning within ESF structures. According to one interviewee, there is a chance that socially innovative activities carried out by NGOs will rise in number due to the potential of the concept.

Cooperation between social partners and NGOs is vital in Italy, occurring at varying levels of intensity depending on the regions (the North–South divide was also referred to in the context of socially innovative activities).

As in other countries, the new partners are not yet very familiar with social innovation, even though many socially innovative initiatives are in place. A step forward was a debate on social innovation and its actors, organised by the Forum of Public Administration (Forum PA) in May 2012, called 'Innovazione sociale made in Italy'. The debate stressed the importance of developing the relationship between the state and its citizens, developing the governance of services in relation to social change, and comparing tools and policy development for social innovation in areas such as governance of common goods, welfare, entrepreneurship, finance, education, technology, science and society, environment and territory.

### Examples of pathways to social innovation

#### *Social partners*

A large-scale initiative involving the trade unions is AUSER, which mainly supports the participation of older people in volunteering activities, especially in the field of education. The project also has an initiative for vulnerable people – *Abitare Solidale* (Supportive Living) – facilitating cohabitation for those with housing problems.

Meanwhile, the regional, public-funded Bollenti Spiriti Programme in Puglia promotes the social participation of young people with the involvement of several employers' organisations.

#### *NGOs/civil society*

An example of a business–NGO partnership is the Social Innovation Initiative led by NGO Sodalitas, with the participation of over 30 companies. It aims to provide non-profit organisations with business skills, while encouraging business–non-profit partnerships. Another example of cooperation is the Naples 2.0 International Social Innovation Competition, which was run by UniCredit, the Project Ahead social cooperative and the Euclid Network (see European Commission, 2012b).

I-SIN is also linked to the Euclid Network. The association aims to be a place for discussion and exchange of good practice and innovative initiatives in order to identify, stimulate and develop social innovation.

Meanwhile, the Hub Network is an international network of unique physical spaces where entrepreneurs and creative professionals can access resources and be inspired by the work of others to come up with innovative ideas, develop useful connections and identify market opportunities. It can have various local positive spin-offs, as seen for example in the case of the Rome Hub and the Milan Hub.



There are also many examples of initiatives where social partners, administrative authorities (in particular municipalities, provinces and ministries) cooperate with NGOs in socially innovative projects. Annex 2 to this report contains a list of such initiatives.

## Conclusions

A relatively large amount of information is available with regard to socially innovative activities in Italy. This may be a result of the long tradition of social cooperation in business, and the recent debate on social innovation and its actors run by Forum PA. Consequently, many social partners' initiatives and civil society initiatives refer to socially innovative actions. However, the new partners do not use the term social innovation in a consistent way, suggesting that there is a lack of clarity with respect to the concept of social innovation and its objectives, political fields, sectors and target groups.

## Ireland

### Innovation and social partnership culture

The Innovation Union Scoreboard (IUS) 2011 ranked Ireland at tenth place, slightly above the EU average (European Commission, 2012a). The country is in the group of 'innovation followers' together with Austria, Belgium, Cyprus, Estonia, France, Luxembourg, the Netherlands and Slovenia.

A recent development in Ireland is the Forum on Philanthropy and Fundraising recommendation to create a national Social Innovation Fund.<sup>5</sup> The forum says the fund should have a substantial size to support the establishment and growth of social innovations. Social innovations are seen as having a potentially transformative impact on critical social issues facing Ireland, including unemployment and environmental issues. Interestingly, a similar proposal was made by the Irish Congress of Trade Unions (Congress) in 2009, with the aim of enabling unemployed people to use their skills in community work. Proposed activities included, for example, social employment programmes in the field of childcare, elderly care or community development, and the implementation of job rotation programmes or apprenticeships (Irish Congress of Trade Unions, 2009, p. 7).

Ireland's social partnership culture is characterised by voluntarism, which evolved in the early 20th century. In the past 20 years an erosion of voluntarism could be observed as employment relations became more rights-based. Collective bargaining has become concentrated at the national level; since 1987, six centralised agreements or social pacts have been negotiated. One example is the Programme for National Recovery, which established an institutionalised system of social partnership extending into a broad field of economic and social policy and involving a combination of consultation and negotiation. A current social partnership agreement, 'Towards 2016', sets out that the government and the social partners will continue to work together over the 10-year period of the agreement.

The trade union included in this study is Congress and the employer organisation included is the Irish Business and Employers' Confederation (IBEC).

### Engagement of the new partners in pathways to social innovation

Social partners and representatives of the voluntary sector are members of the ESF Monitoring Committee. Partnership takes place at two levels within the ESF Operating Programme.

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<sup>5</sup> The Irish government set up the Forum on Philanthropy and Fundraising in May 2006. The Forum's final report was launched in Dublin in July 2012, and sets out four key recommendations and an action plan for increasing philanthropic activity in Ireland (Forum on Philanthropy and Fundraising, 2012).

First, at a governance level, representatives of the social partners (employers, trade unions, farming and community and voluntary sectors) are members of and participate in the work of the monitoring committee. This participation provides an opportunity for wider dissemination of information. Social partners were also involved in the consultation process leading to the development of the operational programme. All social partners are used to working within this structure and understand how to participate in a meaningful and constructive manner.

Second, at an operational level, the partnership principle involves academic institutions, NGOs and public bodies acting as beneficiaries of ESF funding. The boards of the partnerships are made up of four sectors – the state departments and agencies, the social partners, regional representatives and the community and voluntary sector. Based on widespread consultation and analysis of needs, the boards develop and implement strategic plans for their geographic areas. The focus is on addressing socioeconomic disadvantage.

An important partnership between social partners and NGOs exists under the Irish Local and Community Development Programme (LCDP), a government programme aiming to combat poverty and social exclusion through partnership activities. The programme is delivered through Local Development Companies (LDC), of which over 50 have set up activities across Ireland, making up about 60% of total LCDP funds resources. Social partners are represented on the company boards of LDCs. Furthermore, trade unions have well-established partnership structures at the local level – for example, the Congress Centres for the Unemployed. These structures are created as independent NGOs that implement innovative activities for vulnerable groups; but they are managed by trade union representatives and are connected in a network. This is an important pathway into social innovation in Ireland, as many LDC initiatives have been mainstreamed due to their innovative character. Currently, the LDCs are confronted with serious financial cuts due to the economic crisis, with limited resources available for projects.

A characteristic of the Irish social partnership is the traditional involvement of the civil society or voluntary sector. However, this partnership model seems to have suffered since the onset of the economic crisis, which has hit Ireland particularly hard. The government engages with civil society in certain sectors (such as social protection). Within the LCDP, civil society is involved in programme planning, as the community and voluntary sector is represented on the governing board of LDCs, alongside representatives from local governments and national social partner organisations.

### Examples of pathways to social innovation

#### *Social partners*

The Union Skills Network was a project of Congress and the Irish National Training and Employment Authority. Its main objective was to put in place a nationwide network of trained work-based advocates (Union Learning Representatives) who provide advice and guidance for those who wish to improve their qualifications. The programme was funded by the government, but the funding was stopped after the onset of the economic crisis.

Other Congress projects include the Congress Centres for the Unemployed (for example, the Larkin Unemployed Centre in Dublin and the Kildare Resource Centres for the Unemployed) and the Disability Champion project providing training in order to build a network of expertise in relation to disability and employment.

On the employer side, IBEC published various documents in the field of diversity management, including *Cultural diversity in business* and *Ireland's changing workforce: Harnessing diversity in the workplace*, as well as the brochure for migrants *Moving to Ireland to work: Your first few weeks* (see IBEC, 2003, 2009a and 2009b).

### *NGOs/civil society*

Social Entrepreneurs Ireland is a privately funded initiative that aims to support social entrepreneurship. Projects are supported financially and receive intensive input over a period of two or three years.

Young Social Innovators seeks to engage young people in civil society activities with the objective of enabling them to deal with difficult issues and to advance change.

### *Projects undertaken in partnership*

The LDCs are important platforms of social partner–NGO–government collaboration. One example of an activity performed by South Tipperary Development Company (Goal 3 of the LCDP) is COMPASS. The employment services provide information, individual support and mediation. They also refer to other support structures, training and education activities and support self-employment. The COMPASS project offers a one-stop-shop principle at the local level (POBAL, 2011). Another government initiative managed by an LDC is *Tús* – Community Work Placement which offers short-term work opportunities in community or voluntary organisations for unemployed people. Projects include, for example, energy conservation work in low-income homes and community buildings, social care, personal assistance to people with particular needs (such as restricted mobility), childcare, and support for adults and children with a limited command of the English or Irish languages.

The Workplace Innovation Fund was created in 2007 for a three-year period by the government organisation Enterprise Ireland and the National Centre for Partnership and Performance, with the objective of improving productivity through workplace innovation. Workplace innovation is understood as new practices, structures, relationships and ideas in the development of products and services and can include teamwork, decision-making, problem solving and upskilling (National Centre for Partnership and Performance and Enterprise Ireland, 2007).

## **Conclusions**

The concept of social innovation is well-known in Ireland even if the term social innovation is not regularly used; stakeholders such as trade unions and NGOs are practising innovative approaches, while social innovation seems to be less prominent within employers' organisations. Both employers' and employees' organisations are engaged in setting up activities targeted at marginalised groups (mostly low-skilled workers and unemployed people) through the activities of individual organisations or through LDCs. The existence of many socially innovative activities in Ireland may arise from the country's long experience of the partnership approach. The current lack of funding for partnerships is regarded as a major obstacle for the development of socially innovative activities.

## **Poland**

### **Innovation and social partnership culture**

The Innovation Union Scoreboard (IUS) 2011 ranked Poland 23rd of all the EU Member States (European Commission, 2012a). Poland is the weakest performer in the group of 'moderate innovators' and below the EU average. Several laws have been passed that support the creation of social enterprises, such as the Social Employment Act 2003 and the Social Cooperatives Act 2006. This is of relevance for pathways to socially innovative actions with regard to marginalised groups as Polish social enterprises are, for example, strongly engaged in work with people who have physical and mental disabilities (Kietlińska, Piotrowska-Marczak and Mikołajczyk, 2007). Programmes and funding instruments for the development of innovative activities are, however, mainly linked to the ESF in Poland.

Social dialogue was institutionalised in Poland in 1989 through the establishment of the Tripartite Commission for Social and Economic Affairs at national level. Today, social dialogue is pursued at national, sectoral and regional levels. Concerns over the current economic crisis have strengthened social dialogue at national level.

Social partners included in this study are two employers' organisations: the Polish Confederation of Private Employers 'Lewiatan' (PKPP Lewiatan) and the Independent and Self-Governing Trade Union Solidarity (NSZZ Solidarność).

### Engagement of the new partners in pathways to social innovation

A National Thematic Network for Partnership was established in June 2012. The network was founded because civic and social representatives on the ESF monitoring committees perceived that they had little influence on real decision-making by the committees. The network aims to provide concrete support for the monitoring committees, especially those representing socioeconomic partners (the term 'socioeconomic partners' includes employers' and employees' unions, non-governmental organisations and representatives of academic institutions). The social partners have been involved in the ESF Coordination Committee to ensure strategic monitoring and evaluation of the National Strategic Reference Framework implementation.

Calls for proposals directly addressing social partners are launched under a measure of the ESF Operational Programme entitled 'Strengthening local partnership for adaptiveness'.

Innovative civil society initiatives are often set up in the form of social enterprises or cooperatives in Poland.

Besides the representation of NGOs in ESF consultative bodies, there is no evidence of NGO engagement in programme planning. However, a working group for civil society was formed within the structure of the Coordination Committee.

Institutions relevant for the engagement of new partners in the implementation of ESF activities are the regional institutes (of which there are about 50 across the country, two to three per region). These institutes engage local stakeholders and provide them with training and support. Mainstreaming of projects was repeatedly named as the major challenge faced by the institutes.

Through the operational programme, the ESF, as the project holder, puts an emphasis on capacity-building, which includes training, networking measures, strengthening social dialogue and activities undertaken jointly by the social partners, particularly with regard to the adaptability of workers and enterprises.

### Examples of pathways to social innovation

#### *Social partners*

Social innovation is a topic discussed mainly in relation to the ESF in Poland. Social partners develop innovative activities primarily for ESF-funded projects targeted at the members of their own organisation (for example, the Diversity Index developed by PKPP Lewiatan).

Examples of pathways to social innovation can be found for employers' organisations in the form of partnerships implemented with NGOs targeting vulnerable groups (such as *Włącz się* or 'Join in', developed by PKPP Lewiatan).

#### *NGOs/civil society*

Several socially innovative activities exist in the civil society arena. For some of these, for example the Foundation for Social and Economic Initiatives (FISE), the target groups include unemployed and/or homeless people.

Recent initiatives include the Unit for Social Innovation and Research – Shipyard and the Polish Federation of Non-Governmental Organisations (OFOP).

Another example is the SIC! – Social Innovation Centre, which has been established to support the optimum development of local governmental institutions, associations and foundations operating in the field of social work.

## Conclusions

Discussions on social innovation mainly seem to take place within ESF implementing bodies in Poland. Also, within civil society there is a strong link between social innovation and the ESF. There is little evidence that social innovation is being addressed at governmental level or by the social partners. Consequently, pathways to social innovation are established mainly within the ESF, which still sometimes falls short in the implementation and mainstreaming of successful projects.

## Sweden

### *Innovation and social partnership culture*

Sweden is the innovation leader within the EU27, according to the Innovation Union Scoreboard (IUS) 2011 (European Commission, 2012a). Other Member States in this group are Denmark, Finland and Germany. In October 2012, the Swedish Innovation Strategy was launched against the background of the challenges faced in the field of competitiveness and job creation and with regard to social and demographic changes. The strategy was developed in dialogue with the business sector, NGOs, academia and social partners and refers to social innovation as follows: ‘for creating innovative businesses the potential of social innovation and social entrepreneurship should be used in order to meet societal challenges’ (Swedish Ministry of Enterprise, Energy and Communications, 2012).

Furthermore, a special call for projects focusing on social innovation was launched in the framework of the ESF in 2011, with the involvement of the working committee of the ESF Monitoring Committee. Social innovation has been discussed in the 2011 ESF Annual Report, which the committee approved, and it has also been a subject in the committee’s discussion on the continuation of the Europe 2020 strategy. According to one interviewee, legislation places an obligation on the central government and the local governments to collaborate with ‘non-governmental partners on social issues’ (Government Communication 2008/09: 207).

Collective agreements play a central role in regulating relations between employers and employees in Sweden and are legally binding for the members of the signing organisations. The agreements can cover any aspect of the employment relationship (for example, wages and working conditions). Established interest organisations are also members of state commissions that make proposals for future developments in specific policy fields.

The employers’ organisations included in this study are the Confederation of Swedish Enterprise, the Swedish Association of Local Authorities and Regions (SALAR) and the Swedish Agency for Government Employers (SAGE). Employees’ organisations referred to include the Swedish Trade Union Confederation (LO), the Swedish Confederation of Professional Employees (TCO) and the Swedish Confederation of Professional Associations (SACO).

### **Engagement of the new partners in pathways to social innovation**

Although social innovation is not a very common topic in the public debate in Sweden, many socially innovative activities are initiated by the social partners and NGOs.

With regard to the efforts of social partners concerning people in vulnerable situations, the research indicates that they are target groups of the social partners. Social innovation is regarded as a ‘positive concept’ by the interviewees of this study.

In Sweden, NGOs are involved in programme planning activities, for example in the elderly care sector.

In the 2007–2013 European Structural Fund period, eight partnerships were established at regional level that play an active role within the ESF programme (and the European Regional Development Fund (ERDF) programme) by determining the importance of project selection. The so-called structural fund partnerships (SFPs) are established by law and must include representatives from social partners. Social partners and NGOs are officially recognised members of the SFPs. The ESF has funded many projects of which various labour organisations are beneficiaries. NGOs are represented on the three ERDF monitoring committees by about one representative/member out of a total of around 15 in each committee. NGOs are also represented on the ESF Monitoring Committee. The same organisations represented on the monitoring committee and/or SFP can also apply for project funding.

### Examples of pathways to social innovation

#### *Social partners*

The Swedish Municipal Workers' Union (Kommunal), Sweden's largest trade union, develops and implements socially innovative activities such as the (re)qualification (including offering basic education and language training) of migrant women.

The Swedish Trade Union Centre for Undocumented Migrant Workers provides assistance to undocumented migrant workers and asylum seekers in safeguarding their labour market rights through legal advice on issues such as wages, working hours, working conditions and the work environment.

LO is engaged in issues including integration and ethnic discrimination. Activities include training, recruitment, education, information campaigns and exhibitions.

The project 'All Clear' gives advice on how to handle sexual orientation issues at the workplace, arranges training and provides education and training materials. The project is coordinated and supported by various organisations, including employers' and employees' organisations.

SALAR hosts a section on its website on public sector innovation, where many aspects of public service innovation are discussed.

#### *NGOs/civil society*

The Forum for Social Innovation Sweden is a meeting place for academia, industry, government, civic society and non-profit organisations striving to develop social innovation and social entrepreneurship. The forum focuses on sustainable urban development, rural development, leadership, social financing and corporate social responsibility. Together with SALAR, it has published a brochure entitled 'Innovators of society' about the Smedjan project – a 'think-and-do-tank' involving politicians, social entrepreneurs and researchers.

The *Hoppfull Bemanning* (Hopeful Staffing) social enterprise is an agency for homeless people. Located in Stockholm, the agency helps homeless people who want to start working, to get in touch with employers in fields such as construction, property maintenance, gardening, building, cleaning, soil management and distribution.

### Conclusions

In Sweden, government, social partners and civil society work together in close cooperation, by including the most professionalised NGOs in the programme planning processes. Even though social innovation was not frequently referred to, as such, by the Swedish interviewees, the majority of stakeholder groups seem to have a positive view of the concept of social innovation. The main reference point for implementing socially innovative activities in Sweden, however, is

also the ESF. The so-called structural fund partnerships (SFPs) are cooperative structures established at the regional levels that also develop activities for vulnerable groups.

## Conclusions from the country studies

The engagement of the new partners, that is social partners and NGOs, in the design and application of programmes and initiatives promoting social innovation varies across the six countries, as does the understanding of the concept of social innovation. The main areas of interest of the analysis were programmes and initiatives in the policy triangle of ‘employment – education – social policy’. Overall, there are a number of key findings.

- The majority of socially innovative programmes and initiatives that were found are EU-driven actions funded, for instance, by the European Structural Funds, in particular the European Social Fund (ESF). The reason for this may be that these programmes fit in a common structure and are continuously monitored. Socially innovative projects do exist outside the ESF, but they are usually not branded as ‘social innovation’.
- Social partners are – with a few exceptions – not familiar with the concept of social innovation. On an individual basis they are engaged in setting up and promoting social innovations that improve the conditions for marginalised groups, but this is most often limited to individual projects. The reason for this is that most of those in vulnerable situations are outside of the main target group of social partners (for example, people outside the labour market).
- NGOs often act as implementing bodies of social innovations. Their engagement in the design of programmes, however, is mainly informal (for example, there is no formal involvement of the civil sector in the ESF at EU level). Several such programmes involve collaboration between NGOs and social partners, often facilitated by governments.

Generally, two strong forms of linkage have been observed:

- actors from civil society mainly refer to the ESF when asked about socially innovative actions for vulnerable groups (social innovations = ESF);
- in the business environment (in other words, among actors representing employers’ organisations), social innovations are mainly linked to the concept of social entrepreneurship (social innovations = social entrepreneurship).

The results of the study confirmed the original hypotheses. Since innovation is core in the ESF-funded operational programmes and since the partnership principle is implemented in the EU Member States and regions, partnerships are set up between the public and the private sector at the programme level in many Member States; this allows the involvement of social partners particularly in the design and implementation of programmes fostering innovation. In one way or the other, social partners also act as implementing bodies of activities funded by the European Structural Funds, and, consequently, are regarded as recipients. By contrast, marginalised groups are the main target group of the programmes and hence are recipients and end users in the Member States. They are rarely involved in the design, application and monitoring of programmes fostering social innovation.

Three levels of involvement of the partners regarding the two phases of social innovation – design and application – can be mentioned in this respect.

- Level 1: Involvement in monitoring and/or advisory boards of EU-funded programmes, particularly at the national and regional levels. This level mainly refers to the design of social innovation.
- Level 2: Engagement as recipients (monetary beneficiary) of initiatives. This level refers to the design and application of social innovation.

- Level 3: Engagement as end users of initiatives (that is, non-monetary beneficiary – for example, beneficiary in terms of better services provided such as one-stop-shops offered or knowledge gained). This level refers to the application of social innovation.

Table 2 summarises the engagement of the partners concerned.

Table 2: *Engagement of the new partners in EU-funded programmes, particularly the ESF*

Engagement in/as	Partners	
	Social partners	Vulnerable groups
<b>Monitoring and/or advisory boards</b> (referring mainly to the design of social innovation; programme level)	Regularly with regard to operational programmes at the programme level of all EU27 Member States; Engagement in programmes that are co-funded by non-EU partners depends on Member State’s policy governance system, culture and policy field.	An active, direct involvement of marginalised groups in the design and application of social innovation at programme level seldom occurs.
<b>Recipients (monetary beneficiary)</b> (referring to the application of social innovation)	The partners are recipients in the Member State, in particular at the regional and local levels.	The partners are the key target groups of the programmes and initiatives.
<b>End users (non-monetary beneficiary)</b> (referring to the application of social innovation)	Social partners rarely act as end users.	The partners are the key target groups of the programmes and initiatives.

Key:

Strong involvement
Involvement
Rare involvement



As concluded by the country studies, non-EU-funded large-scale programmes involving social innovations for marginalised groups were not found in the six countries. However, several individual projects were identified as part of this research, including those involving social partners. The case studies in this chapter describe the setting up of an ESF-funded project in Sweden, a non-ESF-funded project with the involvement of a trade union in Slovenia, and a non-ESF-funded project with the involvement of employers' organisations in Ireland. The subheadings used in the case studies conform to those used in the 4-i process of social innovation (see Annex 1 for more information).

## Case study 1: UMA – Sweden

### Idea – Novelty

#### *Target group – meeting societal demand*

The UMA (*Utveckling mot arbete*) project, hosted by Alma Folkhögskola (Alma Folk High School) in Stockholm, targets people aged 16–64 in Stockholm County, who are outside the labour market, many for a long time (on average 9–10 years) for reasons such as mental disorders, alcohol or drug abuse, social problems or stress.

During their long-term unemployment, participants have been through the system of the Swedish welfare state, while the various authorities have tried to help them via different measures, which ultimately have failed to reintegrate them into the labour market. UMA aims to help these people end their social isolation and provide them with opportunities to find and keep a job.

Forty-six per cent of participants are immigrants, which is an additional barrier to participation in employment. The project has an equal gender split. The funding covers 540 participants; currently 334 are involved.

UMA provides opportunities for workplace experience. Therefore, companies are also one of the target groups. The project targets both large and small companies in the public and private sectors.

#### *Idea generation process*

The idea of the project was based on *Livsval* (Life choices), a previous ESF-funded project, also run by Alma, which was considered successful as 20% of participants left the project and found a job. While UMA targets the same marginalised groups, it takes the methodology a step further by also targeting companies and providing opportunities for work experience.

Alma started the process a year before the application was sent to ESF. Ideas were generated for the project through a series of discussions and workshops with authorities and other public organisations and some NGOs, working in the areas of health, employment and criminal justice. Employers were not yet participating at this stage, but the target groups were involved: the initial ideas were discussed with participants of the *Livsval* project, including what they thought they would need in order to have the best chances of finding a job. From this process, it emerged that what was needed was not a fixed programme but one tailored to the needs and capabilities of each participant.

### Intervention – Involvement

#### *Territorial and socioeconomic context*

Stockholm County is made up of 26 municipalities, of which 11 are in the Stockholm urban area. The project is coordinated by a steering group comprising authorities (which include the Stockholm municipalities, the psychiatric services of the Southern Stockholm region, the employment service and an administrative authority for people with health issues), an NGO social enterprise involved in drug rehabilitation and representatives from the largest enterprises in Sweden.

In the Swedish welfare state, the authorities provide much of the security net while NGOs are less involved compared with other European countries. People can receive unemployment benefit for one year. After that, if they still have not found a job, they move to a social benefit system. If they have mental health problems, they can receive disability benefit along with psychiatric treatment. Therefore, UMA provides integrated programmes while remaining in close contact with psychiatrists.

While the authorities often make it compulsory to participate in rehabilitation programmes in order to receive social benefits, it is important that participation in UMA is a choice. While UMA collaborates with the authorities, Alma itself is an NGO.

### *Setting up a fruitful environment*

UMA creates individual plans for each participant. Every week participants can choose from around 50 activities. There are health-related and social activities (such as yoga, walks, cultural lectures, cooking or how to deal with stress), Swedish language training and information technology (IT) programmes focusing specifically on using computers at work (for example, email, word processing and data spreadsheets). Some teachers also teach courses at Alma, but some were hired specifically for this project on a part-time basis.

The teachers have relative freedom over the structure of the classes, as the course outline they receive can be adapted to suit the atmosphere created in each of the groups.

In addition to taught classes, participants have access to coaching sessions. Coaches provide motivation, increase self-esteem and help participants to identify realistic plans for the future. Each coach works with a group of 25–30 participants, some of whom have day-to-day contact with their coaches.

To prevent participants getting too dependent on their coach, especially if they meet every day, participants are helped to gradually move on, and are encouraged to spend an increasing amount of time in training and less at UMA. Many start at two hours a day or one day a week of training, and the other days they attend activities and meet their coach.

UMA works in close contact with psychiatry, alcohol and drug centres.

In addition, UMA works with companies to prepare them for working with the target group. Through a ‘support in employment’ method, UMA provides education to the management and staff about the target group and on how to rehabilitate them. The aim is that they should not be afraid to engage.

Many participants can only work a few hours per week due to their illness, but according to the spirit of the project this is not a problem, as long as they try.

### *Development process*

Participants are usually recruited through recommendation by authorities. To start this process, when the project began an information campaign was directed at authorities that had worked with *Livsval*.

The project managers feel that it is easier to get smaller companies on board. Some larger companies also participate as they are keen to be involved in corporate social responsibility projects, but they are a lot more difficult to engage. If a company finds a person suitable for the work during the training period, they can employ them and then receive support from the authorities.

The most common issue is the participants' conflict with the authorities. The authorities tend to make the activities compulsory and specify how many hours the participant should spend on the project in order to receive benefits. Often this emerges when a participant recovers their health and thus falls under the responsibility of a different authority, for example, moving from the receipt of social benefits to unemployment benefit.

However, forced participation contradicts the project's approach, which is based on the principle that the key to success is motivation: participants should want to do the work, and if they are not feeling well enough to go to work at some point, they should not be forced to. They can contact their coach by phone or email and can try to carry out the work from home. Furthermore, many participants are vulnerable and not yet ready to move on to the unemployment scheme, and therefore are at risk of falling back to their earlier problems (such as drug abuse).

This contrasting view puts UMA in conflict with the authorities and is the subject of a continuing discussion.

## Implementation/Institutionalisation – Effectiveness

### *Acceptance by society*

The aim of the project is not only to help people who have been isolated to reconnect with society, but also to increase their acceptance by society, especially by employers.

Companies are often wary of employing people who are not quite ready to go back to work. In this context, UMA is acting as a filter for participants' readiness for the work environment, preparing both companies and participants for the work. The coach is responsible for determining whether a participant is ready to try on-the-job training. They keep continuous contact with the company, informing them about the history and risks associated with participants.

Regarding public authorities and other organisations, some have limited knowledge of the project at this early stage, but some others have been involved with Livsval (for example, through referring participants to the programme) and have thus built a positive relationship with UMA.

### *Sustainability*

The project is funded by the ESF and runs for 2.5 years, which, according to the project managers, is short for a complex project that is trying to create a long-term impact.

The financial model includes 50% funding from the ESF, while 50% is provided through the social welfare payments received by each participant, calculated according to the amount of time they spend on the project. This involves heavy administration: the financing is calculated individually each month based on information from authorities about welfare payments received and time spent at UMA, in an attempt to balance this with amounts received from the ESF.

In addition, this creates an incentive for projects like UMA to work with people who receive higher levels of benefits, though UMA is actively trying to avoid this.

This set-up is a serious issue for the project leaders, who believe that this is one of the reasons why ESF-funded projects in Sweden are usually run by the government authorities that can provide continuous cash flow. For NGOs, it is much harder to provide the funding and the administration, even if they provide the methodology that works.

### *Mainstreaming and scaling up*

Discussions are being held on how to implement the same methodology after the close of the programme. The managers of the project would like to sell the concept of the programme to the authorities. Projects like UMA are in keeping with the principle of getting the target groups into work (instead of living on invalidity pensions), but the most important issue is to provide the infrastructure for this and to establish which organisations should be responsible – for example, the public employment service, the social insurance agency or the local authorities.

An exchange of knowledge and participants is planned with another ESF-funded project in Germany.

### **Impact – Dissemination**

#### *Process of generating impact*

To ensure the continuous improvement of the project, a reference group was set up with the participants (this is an open group, to which all of them are invited). An UMA representative also attends. Many new ideas are generated during these sessions about activities that could prepare participants for a job.

The evaluation of the project is carried out by an independent researcher specialising in ESF projects. In the early stages of the project the researcher also helped in developing the goals and establishing how to measure them. Evaluations are carried out every two to three months in a meeting attended by participants, groups of coaches and teachers. The evaluation reports are presented to the steering group and to the coaches.

This ongoing evaluation provides a good opportunity to improve the project's methods. Often different types of activities are tested and if some do not work they are replaced with new ones based on ideas from the participants, coaches and project members.

The ESF also has its own evaluation of the project, producing monthly reports on its progress. The evaluation of Swedish projects often focuses on gender issues.

While the project is very flexible and individualised, its aims are clear. The main quantitative goal of the project is that 50% of participants are put into work at 100% of their capacity. Each participant's capacity is defined with the support of their coaches and help centres. Also, when they try to work at a company, they test what goals are realistic for them.

It is hoped that many participants will be employed by the end of the project, but it is known from the experience of *Livsval* that around 25% will not succeed because of issues with drugs, alcoholism and mental illness. So far, about 100 participants have left the UMA project, most of them because they became too unwell or had too many problems to enable them to participate, but some because they felt the authorities had forced them into the project.

## Case study 2: Social Incubator – Slovenia

### Idea – Novelty

#### *Target group – meeting societal demand*

The Social Incubator, which is hosted by the student organisation of the University of Ljubljana, provides a supportive business environment for students and graduates of the university who want to become social entrepreneurs. The incubator supports students in different stages of development of their business ideas: planning, establishing and running their social enterprises. The incubator is involved in four types of activities: incubator, knowledge, start-up capital and – more broadly – promotion of the social entrepreneurship concept.

Potential participants are recruited via numerous channels including workshops run by the organisers at university faculties, presentations in classes and conferences. The project leaders at the incubator are considering using students as volunteers to help to run it as a way of equipping students with social entrepreneurship values and skills.

The target group may expand as the incubator's leaders have been in talks with the City of Ljubljana to offer its services to other citizens of the city (for example, school students and unemployed adults).

#### *Idea generation process*

The Social Incubator started as an initiative of three organisations: the Faculty of Social Work of the University of Ljubljana, the Association of Free Trade Unions and the student organisation of the University of Ljubljana. The initial overall broad objective was to help students realise a new career option; that of social entrepreneurship.

At the start of the initiative, all three organisations had somewhat different motives for backing the initiative.

The Faculty of Social Work felt that Slovenia, as a country, lacked a social entrepreneurial environment, as did the university. The faculty itself wanted to explore the concept in greater depth, for example by introducing a new Masters course. The university felt that the issue of entrepreneurship was handled exclusively by the Economics Department, which was not really interested in broadening the scope of the concept and holding discussions with other departments. The Faculty of Social Work saw the incubator as a useful tool for introducing this broader approach.

The incubator was also seen initially as a potential legal entity that could apply for EU or national funding to start work on social entrepreneurship. This unfortunately was not possible because, in order to tender for public procurement, an extensive list of references is required. Finally, halfway through the discussions, the Faculty of Social Work encountered institutional barriers, which indicated that it may not be possible for a public body such as university to be formally linked with an NGO.

The trade unions' original motivation to back the initiative was their desire to promote the concept of workers' cooperatives among the students as a viable business model. The background to this was the fact that many companies in Slovenia were being privatised, sold to foreign companies or closed down, and trade unions saw this as a possible option to keep these businesses going. However, since this concept was not intended to feature strongly among the objectives of the Social Incubator, the unions' enthusiasm for the initiative faded. The trade unions have also reported that, due to financial difficulties, they were not in a position to give any funding.

That left the student organisation as the sole financial contributor. However, due to the limited activity of the incubator, at the beginning of 2012 talks were held about closing down the initiative. The crucial moment came with the arrival of

the current director – a former student – who approached the student organisation and promised to revitalise the initiative.

It seems that the attempt to integrate different views proved too challenging, and that the obstacles were too severe to continue with the three organisations equally involved. However, all three continue to be in touch and do not rule out a closer collaboration should such an opportunity arise.

### Intervention – Involvement

#### *Territorial and socioeconomic context*

The student organisation of the University of Ljubljana represents all students. The organisation's high degree of independence and influence is ensured by a direct funding of its activities from taxes paid by employers who employ students during their studies (the government has on numerous occasions tried to change the system so that the employers pay the government, which would then give part of the funds to the student organisation, but it has so far been unsuccessful in changing the law).

This structural arrangement gives the organisation a steady and secure income that allows it scope for a broad range of activities, including financing of the Social Incubator. The overall amount the student organisation receives from employers has decreased in recent years; nevertheless, it is a fairly secure environment. The Social Incubator is looking at other ways of engaging with partners to become less dependent on this sole source of income. This includes talks with the City of Ljubljana to enter into a partnership and perhaps broaden its target group. The project leader has also taken advantage of publicity opportunities and the Social Incubator receives prominent media coverage. More recently, the Social Incubator has also started cooperation with another eight social incubators in Europe and is applying for EU funding.

#### *Setting up a fruitful environment*

The Social Incubator offers different types of activities and support. One of these is the incubator itself, where students can use the common space for their work, with access to office equipment. The environment fosters dialogue and creative thinking by various people operating in the same space. The organisation runs the Academy of Inspiring Entrepreneurs, which organises seminars, workshops and conferences to teach participants about social entrepreneurship. Potentially, this may open up possibilities for their career. The incubator also pays for two business counsellors to offer advice.

More recently, the incubator has started so-called 'crowdfunding' in the form of a start-up capital fund called 'golden fish'. All the collected funds that are raised during seminars, workshops and other activities will be used to finance the start-up investment for a new social enterprise, chosen through a competition for best social enterprise idea.

The latest idea of the incubator is to link members of the Association of Retired Entrepreneurs with student social entrepreneurs. The senior entrepreneurs often feel they have a lot to offer in terms of experience, knowledge and soft skills that can be useful to students.

The incubator's leaders constantly look for new ways to promote social entrepreneurship and different ways to engage and support prospective social entrepreneurs.

### *Development process*

The main drivers of the initiatives are the two individuals who run the incubator. It is their enthusiasm, vision and determination that has allowed the organisation to grow and branch into new areas within such a short period. They have also managed to interest additional collaborators in becoming involved with the incubator.

This may, however, be a challenge for the sustainability of the initiative should the management change. Nonetheless, the people involved are fully aware of this risk and have taken appropriate steps to make sure that the organisation is well set up in terms of solid structures, diversification of finances and support from various organisations.

## **Implementation/Institutionalisation – Effectiveness**

### *Acceptance by society*

The overall objective of the Social Incubator is to become a centre of development of social entrepreneurship in Slovenia with a focus on creativity, cooperation and multidisciplinary work with young people. The incubator is aware that the concept of social entrepreneurship is not well developed in the country and hopes that, through its diverse activities, it will contribute to its promotion.

This is also the reason why the incubator wants to work with a wide range of partners.

The incubator is innovative in reaching out to new partners, for example targeting youth organisations to determine whether it could offer its services to young people in general and not only students.

In terms of wider implications, the incubator would also like to change the social entrepreneurial culture in Slovenia and make society more aware of its benefits and think that working with youth could be a good way to have a long-lasting effect in the future.

### *Sustainability*

At the moment, funding for all the activities of the incubator comes almost exclusively from the student organisation. As outlined earlier, the incubator is seeking additional forms of funding that would make the organisation more independent. This is important as the funding from the student organisation is not guaranteed and may cease when the priorities of the organisation change.

In addition, if the activities are to be offered to a wider audience than just students, the student organisation may want to limit its involvement, as their primary responsibility lies with students.

The two leaders want to show that by engaging in more self-financing, for example through charging for the workshops and conferences, their activities are valued and people are prepared to pay to participate in them.

The incubator has teamed up with a number of other European social incubators to apply for EU funding. This would not only give the organisation more financial independence but would allow it to broaden its knowledge base and forge new relationships.

### *Mainstreaming and scaling up*

The incubator's leaders have been working with the media, sponsors and even local politicians. They frequently participate in radio or television debates or contribute to newspaper articles promoting the concept of social entrepreneurship.

There have been active exchanges with local politicians who have a keen interest in the topic and the organisation has invited them on several occasions to their conferences. This has automatically raised the profile of the organisation. One of the project leaders was very active in the students' movement and is aware of the importance of close links with the media and other actors to promote the organisation.

### *Implementation process*

The project has gone through fairly significant changes in terms of ownership and management. The initial set-up outlined earlier, of the three organisations equally involved in the running and financing of the incubator, did not materialise and consequently the student organisation emerged as the main 'owner' and funder of the incubator. There were several reasons for this, including financial constraints and differing expectations of the main objective and the focus of the Social Incubator. It is important to emphasise the role of the project leader in reinvigorating the project from its dormant state. However, it seems that the organisation has turned a corner and is now under the management of two project leaders running successful activities which are constantly evolving and expanding into new areas.

### **Impact – Dissemination**

#### *Process of generating impact*

The organisation plans to evaluate its activities in a number of ways, not least to show partners from which the organisation may seek funding that they will be investing in a good project. There are some easily obtainable indicators, such as the number of people attending the workshops or conferences; however, according to the project leaders, these indicators are not a good measure of success. Instead the incubator intends to set its targets by the number of jobs it helps create.

#### *Contribution to change*

It is much too early to say whether the Social Incubator has contributed in a significant way to systemic change. However, the organisation has definitely filled a gap in promoting social entrepreneurship and offering this possibility as a career choice for young people; a path that has so far barely been followed in Slovenia. In that sense, the initiative is helping to make changes at the institutional, systemic level.

Having a broad range of partners from various social spheres has allowed the concept to be more visible in society. Finally, engaging young people will contribute to changes in values and norms that they will carry with them into adult life.

## **Case study 3: 'Dublin's transport links – Racism divides', Anti-racism campaign, Ireland**

### **Idea – Novelty**

#### *Target group – meeting societal demand*

The main target groups of this anti-racism campaign are the employees of the two main public transport companies: Luas, a private tram system run by Veolia Transdev Ireland, and Dublin Bus, a large, state-owned company, both operating services in the capital city. Although traditionally a country of emigration, Ireland has in recent years experienced a large wave of immigration, particularly to Dublin city. Due to its economic boom, the country has attracted a significant wave of migrants, both third-country nationals and EU migrants. According to the latest Census data, the population of migrants in the country is now over 12% and in Dublin over 15%.



Increasingly, too, the workforce is changing and this is also reflected among the employees of major transport companies. Many of the bus drivers and ticket inspectors of both Luas and Dublin Bus have migration backgrounds and as frontline staff are more vulnerable to abuse from their clients, the general public.

Dublin Bus employs 3,200 people, 15% of whom are migrants. The proportion of migrants is much higher among drivers and ticket inspectors.

Other transport companies are joining the anti-racism initiative, most notably Irish Rail, operating the DART coastal railway services in the Dublin and north Wicklow areas and the national railway. As a result, the target group of the initiative may become bigger although, essentially, it will be restricted to the employees of these companies.

### *Idea generation process*

Both companies have noted an increase in the number of incidents involving racial abuse. This has also been confirmed by the findings of a report *Taking racism seriously*, commissioned by the Immigration Council of Ireland – one of the largest and most active NGOs in Ireland (Immigrant Council of Ireland, 2011).

The report noted that there are an increasing number of racially motivated incidents targeting employees of transport companies. Research highlighted a high level of racial abuse targeted at bus drivers and ticket inspectors of black and ethnic minorities. Some of the drivers have also indicated that supervisors are not willing to take this into account and do not differentiate between racially motivated incidents and other abuse complaints.

At the same time, white Irish drivers noted that they sometimes face abuse when they ask passengers for a ticket and then point out that the ticket is not valid. Drivers and inspectors report a lack of knowledge of how to deal with these situations.

The report noted that incidents are initiated by various groups; however, it singled out an urgent need for action targeted at both young and older perpetrators. Both groups would require a different set of measures as they could be motivated by different reasons.

As the issues associated with managing a diverse workforce were new to the management of companies, there was a broad strategic agreement to work together, and also to engage the Immigrant Council to devise a strategy that all parties would sign up to and promote.

After the publication of the report in October 2011, the Immigrant Council received funding from the Luas, Dublin Bus and Dublin City Council to implement some of the recommendations from the report and to support Dublin Bus and the Luas in playing their part in implementing the recommendations and developing internal mechanisms to deal with the issue. In early 2012, the Immigrant Council, in collaboration with the two companies, organised follow-up focus groups with mixed groups of employees and then met senior officials of the two companies to explore in detail how they should respond to the report.

*Sign on display on Luas trams*



Following the meetings, the Luas ran the ‘respect’ campaign. Dublin Bus shortly followed with a similar campaign.

In March 2013, all of Dublin’s main transport companies (Dublin Bus, the Luas and Irish Rail – Iarnród Éireann) with the National Transport Authority, Immigrant Council of Ireland and Dublin City Council joined the campaign for the European Week Against Racism.

### Intervention – Involvement

#### *Territorial and socioeconomic context*

The initiative is strongly embedded in the local socioeconomic environment as public transport is used by all and is one of the spheres where all citizens mix, making it an integral part of public life. The changes that are taking place within the public transport companies, in terms of a more diverse workforce, also reflect the changing structure of Irish society, which is itself becoming more diverse. All groups have to learn how to live together peacefully and, in the case of the companies, how to manage properly a diverse workforce, resolve conflicts and offer support to those who experience problems.

Dublin City Council has been actively involved and has supported the initiative by providing space for discussions, offering its expertise in this area and also supporting the campaign financially.

#### *Setting up a fruitful environment*

The initiative has certainly been innovative as the issue of racism in public transport has only become apparent in recent years. The project is a good example of cross-sectional cooperation and dialogue between parties where sometimes one might expect the relationships to be challenging. One of the reasons why the cooperation has been smooth and effective is the common interests and objectives of all participants.

One of the challenges in creating an environment in which all parties could feel comfortable was to establish a framework in which the employees who felt that they had been abused, based on their immigration status, felt able to report the incident and be ready for follow-up actions. This needed time but also changes to the procedures existing in the companies.

The initiative led to the introduction of new criteria in the reporting system for racially motivated abuse. This change meant that the employees had now a framework under which they could raise the issue. This has also allowed for proper follow-up and, crucially, monitoring of the numbers of incidents.

#### *Development process*

The main drivers of the initiative are the two companies that were faced with new circumstances and had to act in their own interests and those of their employees. Additionally, the Immigrant Council of Ireland and Dublin City Council put their weight behind the initiative.

Because the activities and the idea has been backed and strongly set up within the institutional framework, with the close involvement of the various stakeholders, one can be confident the project will continue and develop further. The involvement and the will of committed individuals within these organisations who are broadly working in the area of integration has definitely helped to push the project forward, especially at the beginning.

## Implementation/Institutionalisation – Effectiveness

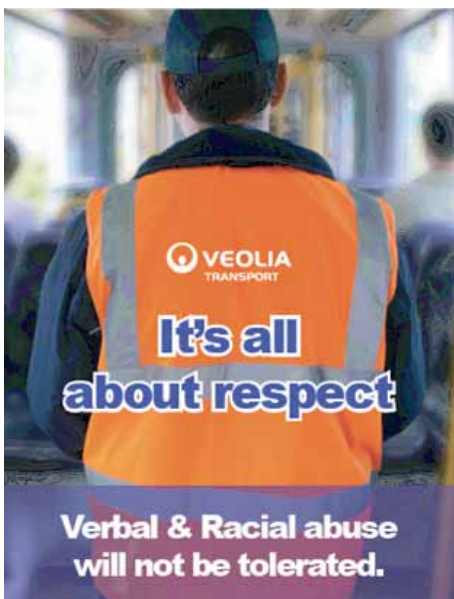
### *Acceptance by society*

The project and the parties involved have made a great effort to help their employees to feel more comfortable in reporting incidents of racial abuse and to change their internal systems. The two companies concerned, with the support of Dublin City Council and the Immigrant Council of Ireland, have also launched a major public campaign aimed at raising awareness of the issue. Large posters have been displayed on public transport to publicise the project among the general public. There is also a campaign run by the Immigrant Council of Ireland that encourages members of the public who see racist or offensive graffiti posted around the city on buses or trams to send pictures to the organisation, which then contacts the service providers and reports on it on their Facebook page.

### *Sustainability*

With its strong base in terms of partners, it seems that this project is well established. It is also promising that there are plans to engage two other providers, which would mean that all national major transport providers in Ireland will have signed up to the initiative. This not only helps to prevent abusive behaviour towards their employees but also sends a strong signal to the public that such abuse will not be tolerated and that there is a united front against it.

*Poster advertising Veolia Transport  
'Respect' campaign*



The initiative has also raised issues about racially based discrimination versus abuse against authority, and to what extent these can be separated.

### *Mainstreaming and scaling up*

The Immigrant Council of Ireland has put forward a proposal for a European project to establish links between several European cities and determine whether there are similar initiatives in other cities, and whether there are any messages others can learn from this example.

### *Implementation process*

The companies carried out a number of actions including the development and implementation of a reporting structure for racist abuse, information and awareness-raising publications, and awareness and training events for managers and supervisors.

Prominent actions include meetings and events in schools and local communities organised through Dublin City Council and the Immigrant Council of Ireland.

## Impact – Dissemination

### *Process of generating impact*

One of the most concrete outputs of the project was the introduction of a new criterion, racially based abuse, into the reporting system for employees. This had previously not existed, which made it impossible to say whether an attack, verbal or physical, was racially motivated.

### *Summary and policy pointers*

The three case studies differ from each other. They have been set up in countries that differ in size and in their approach to welfare and social protection. They target different populations ranging from young unemployed people, to students

wanting to venture into entrepreneurship, to employees of major transport companies. They also have different ways of operating, different frameworks and management styles, and different financial set-ups. However, there are certain similarities between the three case studies and also lessons that can be learned.

### Definition

None of the case studies was preoccupied with, or even aware of, the definition of social innovation. Social innovation, as such, was not the driver or the starting point for establishing the initiative. This is in line with the findings of the previous analysis carried out in the six countries which implied that initiatives with a direct reference to social innovation can be found mostly within the framework of the ESF. Admittedly, the predecessor of the Swedish example operated within the ESF, but not explicitly under the social innovation banner. From a policy perspective, given the fact that the definitions are quite vague, many different projects can be regarded as social innovation.

### Direct responses to the challenge/issues

All three case studies share the fact that their activities originated from the bottom up and were responding to local challenges rather than responding to top-down priorities which the project would have to fit into. An environment can be created that facilitates such bottom-up initiatives to address issues that have not yet reached the top level.

### Reliance on individuals

None of the projects would have a chance to be successful and grow without the personal commitment and enthusiasm of the individuals involved in establishing and running the initiatives. However, the high reliance on the individual makes the projects fragile in terms of continuity, should the management change. Strong links with other stakeholders and structures may help to establish stronger foundations, should this be required. In addition, strengthening such links may provide support for these individuals to encourage them to continue in their role, as they seem to be the driving force behind such initiatives, while at the same reducing the reliance on them individually.

### Sustainability

The question of mainstreaming and sustainability is an important issue for all projects, including the three case studies presented here. Being part of a larger, more structured framework can provide more guarantees in terms of sustainability and long-term perspective; however, a level of flexibility is often required, particularly in the case of small-scale activities.

### Evaluation

All three case studies have an evaluation process and set of targets embedded in the design and implementation of the project. However, there seems to be a lack of attention to a robust evaluation in large-scale programmes across Member States. More needs to be done to ensure systematic evaluation of these types of programmes and initiatives.

### Funding

Many programmes operate on an adhoc or project basis while, at the same time, trying to ensure a long-term impact. The provision of funding should follow a more predictable and sustainable course. In addition, new and innovative ways of securing additional private financing could also be explored.

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## Annex 1

### The '4-i process' of social innovation

Below is a list of several 'critical' questions that can be raised in order to analyse social innovations (clustered alongside the processes of social innovation; they are adapted from the criteria used for the *SozialMarie* Annual Social Innovation Award).

#### 1. Idea – Novelty

##### 1.1. Area of concern: Meeting social demand/societal challenges

*Which social demands or societal challenges are met by the project? Is the issue at stake thoroughly analysed (background, origins, stakeholders) and understood? Are previous activities in addressing social challenges reflected? Does the project look at a social problem in a new way? What is the new social approach or new solution offered by the project? Does the project answer complex problems?*

##### 1.2. Area of concern: Target group

*How was the target group involved? What is the concrete and enduring use of the project for the target group? Does the project further the potential of the target group? Does the project contribute to society's esteem for the target group? Does the project address target groups that receive little attention?*

##### 1.3. Area of concern: Idea generation process

In which circumstances was the idea born?

*Who (individual/s, target group, organisation, cooperation, other) developed the idea? Were different views integrated into the idea (for example, via cooperation established between different disciplines/competencies/groups)?*

*Which obstacles have been faced when including relevant (core) partners?*

#### 2. Intervention – Involvement

##### 2.1. Area of concern: Territorial and socioeconomic context

*How is the project integrated into the local and regional environment? Are relevant social, economic and environmental circumstances incorporated into the project? Which is the strategy towards target groups: Bottom-up involvement, top-down involvement, service provision? Are relevant local/regional stakeholders engaged with or informed about the project?*

##### 2.2. Area of concern: Setting up a fruitful environment

*Does project realisation happen in an inventive, resourceful, creative and courageous way? Does the project foster dialogue / cooperation with other institutions / organisations? Is information on different aspects e.g. decision-making, finances and monitoring and evaluation openly shared within the project? Does the project change with changing needs (i.e. as to the target group: the way of approaching the issue or a changing project environment)?*

##### 2.3. Area of concern: Development process

*Which individuals/organisations can be regarded as the 'drivers' for the change? What were the success factors of the further development of the idea towards an invention? Which failures were observed? And how were they overcome?*

### 3. (Successful) implementation / institutionalisation – Effectiveness

#### 3.1. Area of concern: Acceptance by society

*Has the project put strategies in place for reducing barriers (i.e. the promotion of: positive government policies; supportive legal and administrative framework, good cross-sectoral relations and a culture of cooperation; connections with organisations capable of scaling up the innovation; opportunities for increasing skills and expertise)? Has the idea been supported and accepted by the (region's) society?*

#### 3.2. Area of concern: Sustainability

*Has the project broadened its funding base (that is, non-dependency from single donors/mentors) as well as its knowledge base (i.e. know-how transfer between stakeholders)? Are connections to existing transnational/national/regional/local programmes, structures and strategies e.g. relationships with Structural Funds, ERDF and others being made?*

#### 3.3. Area of concern: Mainstreaming and scaling up

*Does the project encourage options for ongoing learning from both successes and failures? Have key lessons learnt led to project modifications? Have other organisations, media, sponsors, politicians been made curious? Is there a structured and supportive development process in place which assists in mainstreaming and scaling up at both governance and project levels?*

#### 3.4. Area of concern: Implementation process

*Did/How did the 'ownership' of the project change over time (that is, from a single ownership of an individual/organisation towards a widely supported project)? Is the responsibility of the project shared between stakeholders? Which crucial factors were observed when building a solid basis for the project (stable financial fundament, skills and know-how of persons involved, and so on)? Have obstacles successfully been overcome (for example, legal, financial, economic, institutional difficulties, that is obstacles preventing the system from evolving)?*

### 4. Impact – Dissemination

#### 4.1. Area of concern: Process of generating impact

*Is monitoring and evaluation ensured? How can the range of impacts be determined: By the size of groups affected (target groups and by dissemination and replication)? Are there indirect effects beyond the target groups and objectives in focus, and maybe unintended negative effects? What is the time-horizon of immediate and potential future impacts? Is it feasible to assess the end of the innovation's life cycle (that is, becoming common practice) in short periods such as months or years or for example generations? Have the impacts been measured? How and when were they measured (for example, external evaluation or self-assessment; ex-post/ex-ante)? Which impacts were generated (for example, ecological impacts, economic efficiency, distributional equity)?*

#### 4.2. Area of concern: Contribution to change

*What effects – and on who – of this social innovation can be observed? Did the project effectively meet social demands or societal challenges as intended? Did the project contribute to systemic change? Did the project contribute to changing roles (of individuals, civil society organisations, corporate business, and public institutions), relations (in professional and private environments, networks and collectives), norms (at different levels, legal requirements) and values (customs, manners, mores, and ethical/unethical behaviour)? Have societal challenges been resolved, accepted, adopted and utilised by the individuals, social groups and organisations concerned?*

## Annex 2: Description of projects and initiatives

### Austria

#### *Social partner initiatives*

##### **Austrian Federal Economic Chamber (WKÖ)**

In 2008, the programme ‘Mentoring for Migrants’ was established on the initiative of the Viennese section of the WKÖ in cooperation with the Austrian Integration Fund (fund of the Austrian Interior Ministry) and the Austrian Labour Market Service. The project aims to bring well-connected members of the business community and qualified migrants together. In mentoring pairs business leaders support their proteges in their efforts to participate in the Austrian labour market according to their qualifications. So far, 700 mentoring pairs have been formed.

The Viennese section of the WKÖ presents the DiversCity award annually to companies that are implementing activities in the field of diversity management. In 2012, the special prize focused on activities for the inclusion of women. In 2011, the focus was on the inclusion of people with disabilities.

##### **Federation of Austrian Industry (IV)**

The IV’s *Frauen.Führen* (Women.Lead) initiative supports equal opportunities for women in industry. The initiative includes the activities outlined below.

- Companies are encouraged to sign a declaration confirming their intention to increase the proportion of women in leading positions.
- Information events are organised, and companies are supported in their efforts with practical approaches and good practice examples.
- Qualification activities for women are organised: *Zukunft.Frauen* (Future.Women) is a qualification programme for women in senior positions. Workshops deal with topics such as corporate communication, conflict management and annual accounts, and provide networking opportunities. The project is a cooperation between the Ministry of Economy, Family and Youth, the Federal Economic Chamber and the Federation of Austrian Industry.

The IV initiative ‘iv.future’ aims to identify, analyse and monitor future trends in economy and society. A think tank with members from academia, the media and IV meets on a regular basis, a monitoring system collects data and events and discussions are organised.

Through its TRIGOS project, the IV presents awards to enterprises at the federal and regional level for good practice in the field of corporate social responsibility. The following categories exist: workplace, society, market and ecology.

Project partners are the IV, WKÖ and civil society organisations such as the Austrian Red Cross and Caritas.

##### **Austrian Trade Union Federation (ÖGB)**

The ÖGB offers a course of study for women active on works councils. The course consists of four modules addressing issues such as feminist politics, gender mainstreaming and the position of women in Austria. It provides training in debating and public speaking.

In cooperation with the other social partners, the Austrian Employment Service and various social insurance institutions, the ÖGB offers a counselling service and workshops to older employees and employees with disabilities, with the aim of improving their job situation. Target groups include members of works councils, employers, employees and human resource managers. Among the topics covered are awareness raising, information on anti-discrimination legislation and conflict management.

The *Antirassismuskoffer* is an online tool of the ÖGB and civil society organisations that provides training material and literature and film recommendations for trainers working in the field of anti-discrimination and anti-racism ([www.antirassismuskoffer.at](http://www.antirassismuskoffer.at)). It includes a broad collection of training exercises for different target groups (a similar online tool exists for gender issues and gender mainstreaming).

### Chamber of Labour (AK)

The Central European (CE) Knowledge Platform for an Ageing Society aims to help minimise negative effects of demographic change in central Europe. Within the project, a CE-Ageing Strategy has been developed that enables the partners to improve framework conditions in their regions and to adapt to demographic change. The AK is lead partner in the project.

In the *Mut zur Vielfalt* project, run by the AK and the NGO ZARA, three school classes participated in anti-discrimination workshops. Thirteen of these students received further training to enable them to work as peer-to-peer trainers. After they completed their training, they organised workshops for their schoolmates where issues such as racism, discrimination, diversity and civil courage were addressed.

### Civil society initiatives

#### Selection of SozialMarie award winners 2012

*Kinderhospiz Netz* (children hospice network) is a mobile service that supports terminally ill children and young people and their families. This includes, for example, medical-nursing support and psychosocial support provided in the child's home to prevent hospital stays. Doctors, hospitals, the youth welfare office and different associations cooperate in the network, which is mainly funded by private donations.

The *eltern.chat* (parents.chat) project, run by the Vorarlberg Catholic Church, aims to reach parents with low educational levels and engage them in parental education. Parents are trained in moderation techniques during two evening courses. Afterwards, the trained parents organise chats with other parents (4–8 persons) among their friends and acquaintances, where issues related to parenting are discussed. There is a special focus on parents with a migrant background.

Schönbrunn Junior City Farmer aims to tackle problems such as marginalisation, discrimination, malnutrition and lack of exercise through collective gardening. Children aged between 4 and 12 plant vegetables, harvest, cook and eat together. The project's aim is social learning through cooperative action. Target groups are children with difficult social backgrounds or disabilities. The project is funded by donations of private companies and the Austrian Ministry of Agriculture.

Go West, an association for homosexual, bisexual and transgender persons, runs the 'out@school' project which includes workshops in schools for young people aged between 12 and 18. Workshops are held by two adults and two teenagers. They address homosexuality, bisexuality and trans-identity and motivate students to question prejudice and stereotypes.

## Bulgaria

### *Social partner initiatives*

The EU-co-financed project ‘Development and implementation of an information system for workforce competence assessment by sectors and regions’ was described as socially innovative by one interview partner. The Bulgarian Industrial Association – Union of the Bulgarian Business (BIA) is implementing the project, which runs from 2009 to 2013. The Confederation of the Independent Trade Unions in Bulgaria (CITUB) and the Confederation of Labour Podkrepa (CL Podkrepa) are project partners. The overall project objective is to enhance the adaptability and effectiveness of the workforce, as well as to balance labour market demand and supply by developing an information system for workforce competence assessment by sector and region. The project involves around 1,500 employers and human resources managers and 2,500 workers and employees. In the opinion of one interview partner, the project-specific activities led to a growth of awareness with regard to education, vocational training and competence development in Bulgarian society.

The Bulgarian Chamber of Commerce and Industry (BCCI), the Bulgarian Academy of Science, the Agricultural Academy, Sofia Technical University and about 10 other universities established an Innovation Council in May 2011 to encourage the introduction of innovative products and services. The council will also support the linkage between science and business.

### *Civil society initiatives*

With the support of a global partner HP, Junior Achievement Bulgaria offers an initiative called the Social Innovation Relay. Students aged 15–18 are encouraged in teams to develop concepts that are socially innovative and could have a significant positive social impact. With the help of interactive web-based learning programmes, interactive meeting technology and online resources, the participants of the relay work their way through a series of competition stages, learning about social innovation and developing their own inventive solutions to real-life challenges. The student teams have to learn to explain and defend their ideas before volunteers from HP worldwide offices. The volunteers will revise how ideas have been formulated and what potential they have to make a positive change in society, and will then score and judge each concept to determine one winning team from each participating country. In 2011, the team from the secondary school Exarch Antim I in the town of Kazanlak, Bulgaria, won the online competition with the idea of a ship floating in its own fuel.

The Workshop for Civic Initiatives Foundation (WCIF) is a public benefit non-profit organisation. The foundation was registered in 2001 and is a successor of the Charity Know-How Programme for Bulgaria that operated in the country between 1997 and 2001. The mission of the foundation is to support community development by focusing on the mobilisation of local resources. The organisation invests in the capacity building of grassroots organisations, including community foundations, which support the development of local philanthropy. The focus on social innovation is very much related to the field of local philanthropy. For example, WCIF matches funds raised locally by the community foundations (currently in 10 different towns around Bulgaria) for social innovation projects, which are mainly in the sphere of education, children and youth development, inclusion of vulnerable groups, healthy living, environmental protection, preservation of historical and cultural heritage, arts (including street art) and culture. All projects that the organisation supports must encourage civic participation and voluntarism, focusing on inclusion and the equal treatment of disadvantaged groups. At the national level, WCIF supports philanthropy campaigns that are dedicated to social innovation projects, such as ways of enhancing the social inclusion of vulnerable and discriminated groups (LGBT people, homeless people, ethnic minorities, children raised in care institutions). For some of these campaigns, WCIF works in collaboration with public institutions; for example, public officials sit on the advisory committees that monitor the campaigns. The organisation also assists companies in developing their own philanthropy programmes, which are socially responsible. Another socially innovative approach is to introduce new ways of engaging private donors with

important civic causes. For example, WCIF has piloted the open donor circle in the Bulgarian context, thus involving middle-class private donors with development projects.

### Italy

#### *Social partner initiatives*

AUSER is an association set up as an initiative of the Union of Retired People (UILP) and the General Italian Confederation of Labour (CGIL) in 1989. The initiative's objective is to support older people in their right to play an active part in society and to make the most of their experiences and skills. Activities include: education for older people, the establishment of helplines (which provide practical, psychological and emotional support) and volunteering opportunities.

*Abitare Solidale* (Supportive Living) is a cooperation between AUSER Florence and the national AUSER association to help solve housing problems in an effort to create a more cohesive society. Housing can become a problem, for example, for those who cannot afford rents or for those who are no longer able to manage maintenance or costs. The project brings together 'owners/renters' and 'guests'. Both parties agree on a pact of solidarity that binds cohabitation to mutual respect, mutual exchange of services and offers of help.

The Sodalitas Social Innovation Initiative tries to enable organisations to build effective corporate partnerships and support the growth of the voluntary sector as a whole. One yearly highlight is a prize for community-based and non-profit organisations. The aim of the winning project of 2012 (Social Camp community) is to provide young people and families with a wide range of environment-related activities and educational services.

The Naples 2.0 project run by the Euclid Network, UniCredit and Project Ahead was an International Social Innovation Competition in 2011 with the objective of promoting the development of ideas to tackle different challenges faced by Naples (European Commission, 2012b). Innovative ideas in six categories won awards. Among the ideas was the design of a new business model for Maestri Di Strada, an association that reintegrates school dropouts, and a new method of integrating the Roma community of Scampia, a suburb in the north of Naples.

The Bollenti Spiriti Programme includes various measures and actions to enable young people from Puglia, in southern Italy, to participate in all aspects of community life. It provides a network of spaces, youth associations and enterprises in the region, promotes studies and research, and organises events to create opportunities for exchanges between young workers.

#### *Civil society initiatives*

Examples of initiatives, where social partners, administrative authorities (in particular municipalities, provinces and ministries) cooperate with NGOs in the context of socially innovative projects include those listed below.

The overall aim of the Agenda 22 Project is to plan policies and services for people with disabilities.

The Civic Audit Project is a tool that is available to the public and promotes the quality assessment of the performance of local health units and hospitals.

The project Active A.G.E. Managing change: Age, Gender and Employment, carried out by Urbact, had the objective of developing political strategies to address the ageing of society in Rome through a series of further actions. By an exchange of experiences between nine European cities, the project focused on the development of Local Action Plans

by an integrated approach. The outputs of the project are two Local Action Plans in Rome: the first one dedicated to the theme 'Age and care', the second one to 'Age and the economy'.

Welfare Italia Servizi S.r.l. proposed an advanced model of healthcare: dental clinics and places of care for families with high-quality services at an affordable cost. It is an experimental form of collaboration between the private sector, NGOs and public services.

The initiative called 'One-Stop-Shop: Una nuova risposta per l'integrazione degli immigrati' was inspired by a Portuguese project to integrate immigrants. The cities of Lisbon and Porto created two National Centres of Support for Immigrants (CNAI). These centres allow immigrants to find, in the same place, the answer to any of the problems related to their stay in the country.

## Ireland

### *Social partner initiatives*

#### **Irish Congress of Trade Unions (Congress)**

The Union Skills Network was a project of Congress and the Irish National Training and Employment Authority. The main objective of the project was to put in place a nationwide network of trained work-based advocates ('Union Learning Representatives') to provide advice and guidance for those who wished to improve their qualifications. Union Learning Representatives were meant to volunteer at their workplace with the aim of promoting the value of education, identifying work-based and individual training needs and assist low-skilled employees, in particular, in their qualification efforts. This often took place in partnership with the employer. The Union Learning Representatives were supported by coordinators at the regional level. The programme was funded by the government as an initiative to upskill the workforce. When Ireland was seriously affected by the economic crisis, however, the government shifted funding towards unemployed people.

The Congress Centres for the Unemployed are local NGOs, managed by local trade union representatives. Their objective is to support unemployed people through activation measures, training and provision of support during the job search. Currently, 27 centres exist. The centers are run by people who became unemployed; their wages are paid by the government (the equivalent of unemployment benefits). According to Congress, some centres run projects in the field of community work such as childcare services.

Examples of Congress centres are mentioned below.

- The Larkin Unemployed Centre, which offers a variety of services such as adult guidance and community-based adult education, and runs a 'job club' to prepare people for employment. It also offers information on issues such as welfare rights and self-employment. The centre receives EU funding.
- The Kildare Resource Centres for the Unemployed is a network funded by Congress and the Irish government. The centres assist unemployed people in their job search, and give advice on issues concerning, for example, unemployment benefits and disability benefits.

The Congress initiative Disability Champion aims to build a network of knowledge and expertise in relation to disability and employment. A five-day training course for trade union representatives addresses issues such as equality legislation, equality policy in the workplace, supports and grants. The project objective is to increase the recruitment of people with disabilities in Congress.

### *Civil society initiatives*

Social Entrepreneurs Ireland is an initiative funded by private funds and foundations (for example, the NTR Foundation, JPMorgan Chase Foundation and One Foundation) with the aim being to support social entrepreneurship at a national, regional and local level. Within the Impact Programme, every year social entrepreneurs are selected and receive financial support and intensive accompaniment for two to three years. Over the last seven years, about 160 social entrepreneurs were supported with €4.9 million. The supported projects created employment opportunities for 800 people and had a direct impact on 200,000 people. To promote innovation in the Irish social sector an annual award was introduced and the Social Entrepreneurs Ireland Alumni Network was set up.

Young Social Innovators (YSI) is an initiative that aims to support education on social innovation in Ireland. The initiative seeks to engage young people aged between 15 and 18 years in civil society activities with the objective of enabling them to deal with difficult issues and to advance change. Young people work in teams of 5 to 25 people on projects dealing with social issues such as child poverty, local food products or homophobia. Partners are governmental agencies, private companies/foundations and civil society organisations.

## **Poland**

### *Social partner initiatives*

#### **Polish Confederation of Private Employers ‘Lewiatan’**

In March 2012, the *Włącz się* (Join in) project started as a transfer of a good practice project in Spain. The project is run by the PKPP Lewiatan employers’ organisation in cooperation with three NGOs, the aim being to integrate marginalised youth, people with disabilities and victims of domestic violence into the labour market.

Diversity Index is project by PKPP Lewiatan and co-funding by the ESF with the objective of promoting diversity management in enterprises. Within the project, diversity management tools are developed and tested (for example, online diversity check).

Seminars and conferences are organised to disseminate information and a training module has been developed for social partners. The module includes implementation strategies for diversity management and training for social partner representatives.

### *Civil society initiatives*

In 1990, the Foundation for Social and Economic Initiatives (FISE) was created as an independent non-profit organisation. The main objective of FISE is to increase employment – especially among inactive groups – via projects and training activities. For example, the ‘Work in Poland Programme’ (2007–2009) aimed to increase the skills (especially IT skills) and effectiveness of NGOs working in the field of labour market services. The project ‘My Polis – Interactive monitoring system of local partnership and development of active local communities’ (2008–2011) aimed to strengthen civic participation at a local level and especially to develop cooperation between local NGOs and local governments. Since 2005, FISE has advanced the discussion on the development of a social economy sector in Poland via channels such as conferences, debates and publications.

In 1990, the Barka Foundation (or Lifeboat Foundation) was set up as a private initiative to support homeless people in Poland according to the self-help principle. Barka played an important role in the development of civil society in post-communist Poland. The work of Barka is based on education, community and employment: training programmes combine social work with education and upgrade the qualifications of people excluded from the labour market. In Barka



communities, 25–30 people live together, restore old ruined houses and run their own farms. Today, the Foundation provides housing for 750 people and has trained 50,000 people in general and vocational education in the past 10 years.

The Grudziądz Caritas Centre was set up in 1998. Besides other activities, a professional catering service has developed that offers jobs and internship opportunities, as well as rehabilitation activities for convicts. Clients are mainly construction workers but the centre also caters for events.

In 2000, the organisation Community Houses in Cieszyn in southern Poland was established in order to support homeless people, unemployed people and people with alcohol addiction. Apart from offering shelter, the initiative provides vocational therapy workshops where participants can learn basic skills (for example, in carpentry, arts and crafts and sewing), develop punctuality and get used to everyday work.

The Unit for Social Innovation and Research – Shipyard was created by people engaged in the Polish NGO sector with the aim being to evaluate challenges of social life in Poland and to promote effective and innovative methods for reacting to these challenges (with a focus on civic participation). Shipyard focuses on the development of local communities, social innovations and civic participation.

The Polish Federation of Non-Governmental Organisations (OFOP) aims to promote a strong Polish civil society through networking and lobbying activities and the dissemination of good practice. The network was established in 2003. Since 2010, OFOP has coordinated the National Thematic Network on Partnerships (funded by the Ministry of Regional Development and the European Union) with the aim of promoting the partnership principle in the implementation process of EU programmes in Poland.

The Pomeranian Science and Technology Park (PPNT) provides infrastructure for companies working in fields such as biotechnology, environmental protection, IT and industrial design. Additionally, there is a focus on social innovation. Therefore, the PPNT cooperates with the Social Ecological Institute (SIE), Shipyard and the United Nations Development Programme (UNDP). In Poland, the UNDP focuses on the elimination of social exclusion and intends to stimulate entrepreneurship among people with disabilities. A UNDP office is located at the park. One objective of the PPNT is to open social businesses run by disabled people at the park (for example, a bookshop or coffee shop).

## Sweden

### *Social partner initiatives*

According to a Swedish interview partner, the Swedish Municipal Workers' Union (Kommunal), Sweden's largest trade union, has been developing and implementing socially innovative activities and measures since the 1990s.

The general attitude of Kommunal to 'social innovation' is described as positive. However, some scepticism is also expressed, especially at the local level, over some schemes, such as the increased privatisation of the elderly care system at the expense of local professional employees.

Project-specific activities target, for example, women with a migration background. In a transnational project Kommunal cooperated with county councils and several organisations from the social economy to help migrant women qualify or requalify for work. The project offered basic education and language training.

The Trade Union Centre for Undocumented Migrant Workers is an initiative of the Swedish Trade Union Confederation (LO), the Swedish Confederation of Professional Employees (TCO) and the Swedish Confederation of Professional Associations (SACO). The centre was set up in 2008 to help prevent undocumented migrant workers and asylum seekers

from being exploited in the labour market. The centre provides help and assistance to undocumented migrant workers and asylum seekers in safeguarding their labour market rights through the provision of legal advice on issues such as wages, working hours, working conditions and the work environment. In addition, information on healthcare and support in the process of seeking asylum is given. The service is free and the client may remain anonymous.

LO describes ‘the work for integration and against ethnic discrimination [as] a central issue for the trade unions [that] is to permeate LO activities’. In 2004, LO set a target of making the Swedish workplace a model for integration and against ethnic discrimination within 10 years. Activities included training, recruitment, education, information campaigns, exhibitions and many others. The Council for Integration in Working Life – a joint body of employers’ organisations and trade unions – is part of this work. The council aims to develop further the social partners’ work for integration and against discrimination.

Discrimination on the grounds of sexual orientation is a topic Swedish social partners have been addressing for several years. For example, in 2007 and 2008 a working group developed LO’s policy on discrimination at work on the basis of sexual orientation or gender identity.

Against the background of the development of the new Swedish Innovation Strategy, the Confederation of Swedish Enterprise criticised the Swedish innovation policy of recent decades. The confederation noted that investment in research and development would not automatically lead to greater innovation and development. Therefore, it argued that innovation policy should become more results-oriented and that educational policy should ‘clearly encourage schooling that leads to employment’. Furthermore, the greatest shortcomings are seen in taxation, bureaucracy and regulations.

The website of the Swedish Association of Local Authorities and Regions (SALAR) hosts a section on public sector innovation. Issues such as public service innovation, methods to support the development of innovation, innovation in healthcare, among others, are discussed.

A project of the Swedish Confederation of Professional Associations (SACO) called Omstart (Restart) aims to provide information on education and the labour market for newly arrived professionals. Job descriptions for different professions are available on its website (including descriptions of the occupation, education for the profession in Sweden, salary and other related information). The site also provides information on the recognition of foreign diplomas and job hunting.

### *Civil society initiatives*

The Forum for Social Innovation Sweden is a meeting place for academia, industry, government, civic society and non-profit organisations striving to develop social innovation and social entrepreneurship. The forum is jointly funded by 19 different stakeholders (for example, the City of Malmö), all wanting to meet the need for cross-sector partnerships and cooperation in this multidisciplinary field. The challenge of the next few years, for Sweden as for all countries, is to create sustainable growth for people and the environment in a sound economy, which calls for new thinking and new initiatives. The aim is to develop joint projects, partnerships and new products and services. The forum also aims to create an understanding of social innovation and social entrepreneurship and how it can contribute to Swedish and global development. It focuses on areas such as sustainable urban development, rural development, leadership, social financing and corporate social responsibility.

The forum published the brochure ‘Innovators of society’ together with the Swedish Association of Local Authorities and Regions (SALAR). SALAR represents the governmental, professional and employer-related interests of Sweden’s municipalities, county councils and regions. The publication reports on the activities and outputs of the project Smedjan – a think-and-do-tank involving politicians, social entrepreneurs and researchers. The project was financed by SALAR

and the Knowledge Foundation. The Arena for Growth project also participated. Within the framework of *Smedjan*, the participants discussed how local authorities and regions can promote social entrepreneurship, what types of obstacles exist and why social entrepreneurs are important for local development. *Smedjan* has been met with interest, particularly when it comes to what local politicians can do. Six local projects were implemented in eight municipalities. The aim was to find out how municipalities and regions can promote social entrepreneurship. This resulted in six different projects in eight of *Smedjan's* municipalities, as outlined here.

- Fagersta wanted to show appreciation and provide legitimacy to social entrepreneurship, as well as stimulate the interest of young people and increase public awareness.
- Karlstad tested practical work in a social enterprise in the form of a workshop for a number of unemployed people. In addition to fostering participants' empowerment and reducing exclusion, it was a way of providing a group of unemployed people with the potential to become self-supporting.
- Trelleborg targeted people aged 16–24 through small amounts of funding to support ideas to change society, with the potential of becoming self-supporting. This provided the local authority with social entrepreneurs they had no prior knowledge of and the initiative was continued through an ESF project.
- Vara developed a creative role-play as a tool to stimulate creativity and a sense of entrepreneurship. The role-play was linked to an existing school improvement project for developing entrepreneurial learning, tested by teams of teachers and revised as they went along.
- The four municipalities of Linköping, Lycksele, Högsby and Botkyrka carried out a joint study to improve their understanding of the driving forces and preferences of local social entrepreneurs. The study contains 30 detailed interviews and a number of conclusions on regulations, finance and the role of the local authority. It also categorises the social entrepreneurs according to their function, legal structure and funding.

Another example of innovative social entrepreneurs is *Hoppfull Bemanning* (Hopeful Staffing). In spring 2012, the social enterprise was created as the world's first employment agency for homeless people. The agency is located in Stockholm and helps homeless people who want to start working to get in touch with employers in fields such as construction, property maintenance, gardening, building, cleaning, soil management and distribution.

#### LASAIRE

Although it is not from one of the six countries considered in this report, LASAIRE is of potential interest in the context of social innovation. LASAIRE (*Laboratoire social d'action, d'innovation, de réflexion et d'échange*) is an initiative of the Forum Syndical Européen (FSE), an exchange forum for French and European trade unions that has existed since 1990. FSE organises regular meetings with representatives of European trade unions. FSE sees itself as an open, non-institutionalised space for the exchange of ideas and reflection on trade unionism, social movements, civil society and the European Union. The LASAIRE think-tank sees itself as a laboratory for new ideas and a forum for exchange and debate and is supported by the European Commission. Its members include economists, sociologists and social partners working in fields such as employment/unemployment, work and work organisation, social security (with a focus on reforms of the pension and healthcare system). Issues currently being discussed include industrial policy, competitiveness, social protection and wage costs.

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