Thematic Networking
A guide for participants

Technical Dossier no.1

April 2016

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Contents

1. INTRODUCTION

Thematic networking, along with the co-ordination of calls for transnational projects, is one of the two principal elements of transnational co-operation in the European Social Fund (ESF). This technical dossier aims to explain to people involved in managing transnational work in the ESF the role of Thematic Networks and how to manage them effectively.

2. ROLE OF THEMATIC NETWORKS

Thematic networks are platforms which allow ESF Managing Authorities and Intermediate Bodies on their behalf) to:

- co-operate in managing the **co-ordinated calls for proposals** which they will each issue in some or all of the nine themes of the Common Framework
- exchange their knowledge and experience and **learn mutually** from each other how to improve the operation of the ESF

Member States and regions will thus be helped to improve their policy and deliver effective reform. The role of transnational co-operation is discussed at greater length in the *Introductory guide to transnational cooperation 2014-2020 in the ESF.*[1]

The networks are designed to involve the other **stakeholders** in the operation of the ESF, notably NGOs, social partners and regional policy-makers, so as to ensure a balance and complementarity of perspective. Policy impact should be ensured by involving **policy experts** and/

1 http://ec.europa.eu/esf/main.jsp?catId=56

or academics from participating Member States, as well as European Commission policy officers.

Stakeholders at European level will also be able to discuss the implementation of transnationality in the ESF at an annual Stakeholder Panel meeting.

National networks: The networks should bridge the gap between policy-makers and practitioners by engaging with ESF project managers. They should also ensure that the benefits of learning from each other are felt more strongly throughout the ESF implementation chain, far beyond the management level. Member States are encouraged to set up 'shadow' thematic networks at national level, bringing together ESF project managers and relevant stakeholders to share good practice and approaches to tackling common issues. They can serve both as sources of bottom-up input to transnational thematic networks and also top-down vectors to convey developments and findings from the transnational working groups. Dissemination can also be through existing networks of stakeholders (e.g. NGOs).

3. THE NINE COMMON THEMES

In the 2014-2020 programming period, the European Commission is currently supporting nine thematic networks; the maximum number of networks is likely to be ten. They address both policy-related themes and 'horizontal' operational issues related to delivery and governance as follows:

- Employment
- Inclusion
- Youth employment
- Learning and skills
- Social economy
- Migrants
- Governance and public administration
- Simplification
- Partnership

A Member State that wishes to work transnationally on one of these common themes can join the appropriate network. The first round of meetings took place between November 2015 and March 2016. An average of nine countries are taking part in each network, and the lead Member States and priorities so far chosen for mutual learning are shown in the following table:

Table 1: **Thematic Network participants and priorities**

Thematic network	Lead MS	MSs	Priorities for mutual learning
Employment	BEnl	11	• transition long-term unemployment ➔ work • transition work ➔ work incl. self-employment
Inclusion	SE & ES	8	integrated approaches to: • active inclusion • access/modernisation of social services • discrimination & support for marginalised groups
Youth employment	DE	12	• mobility • NEETs (not in education, employment or training)
Learning & skills	IT	6	
Social economy	PL	14	• financial instruments • measuring social value
Governance	CZ	9	
Simplification	BEnl	16	• practical tools • wider approach to simplification • implementation of simplification measures • harmonisation of rules and procedures: definition of proposals at EU level / addressing constraints at national level
Partnership	EE & IE	7	• Clarifying terminology, developing common principles, challenge audit and solutions, providing evidence of partnership added-value, brokering skills, self-assessment tool
Migrants		13	• different approaches/models of integration • awareness-raising • impact of the wider policy framework • labour market access • skills recognition • Funding

4. THEMATIC NETWORK PARTICIPANTS

Who should take part in the thematic networks?

They should include all the stakeholders in the ESF:
- Managing Authorities and Intermediate Bodies
- officials in charge of the policy in the relevant theme
- social partners and NGOs
- national and regional networks involved in transnational cooperation
- academics and external experts

The roles of the different type of participants are described below.

4.1. Lead Member States

Normally one, or sometimes two, Member States will volunteer to lead and animate each network. If the network members wish, leadership can be rotated among several Member States (for instance with each meeting being led by a different country), or a steering group can be established.

Being a thematic network leader means foremost:
- being proactive in setting priorities and proposing activities
- being consulted preferentially and in advance by the Thematic Expert about the preparation of meetings, events, assigning speakers etc.

4.2. Member States

The networks normally involve between 10 and 20 Member States. Each should be represented by a representative of the ESF Managing Authority plus (for those countries taking part in co-ordinated calls in the relevant theme) a policy expert, who can come from a social partner, NGO or academia. Thus, each country should be able to contribute and benefit regarding both the content and the implementation of ESF programmes.

National Contact Points for Transnationality have been designated by the Managing Authorities in each Member State to ensure coordination between those involved in transnational cooperation and the Commission.

4.3. NGOs and social partners

NGOs representing and/or providing services to target groups as well as social partners (employers and trade unions) are encouraged to attend the meetings along with public authority representatives and to contribute to the discussions and activities, so that the needs of beneficiaries and implementing organisations are properly taken into account.

A useful discussion of methods of involving stakeholders in social policy-making, including stakeholder mapping, degrees of involvement and quality standards, will be found in the *Study on Stakeholders' Involvement in the Implementation of OMC in Social Protection and Inclusion* (INBAS and Engender, 2011).[2]

4.4. European Commission officials

Officials from Unit F1 (ESF and FEAD: Policy and Legislation) in DG Employment, Social Affairs and Inclusion are expected to attend and contribute to thematic network meetings, to ensure coherence within the ESF as a whole. Officials from other parts of the Commission can also be invited to contribute, on the invitation of the ESF Policy and Legislation Unit or when they express an interest in taking part.

4.5. Technical Assistance contractor (AEIDL)

The contract to support the ESF Transnational Platform, which includes the thematic networks, is held by AEIDL. It is a yearly contract renewable up to three times and will expire at the latest in July 2019, six months before the end of the programming period.

AEIDL allocates teams of three people to support each network:
- The **Thematic Expert's** job is to ensure that the intellectual content of the network's activities satisfies both the policy demands at European level and the policy and imple-mentation needs at national and regional level. He/she works with network members to ensure their full ownership of the activities and results and, as far as possible, transfers leadership to Member State representatives. However, by default, the Thematic Expert chairs the meetings of the network. The expert prepares a report following each meeting or significant activity, which AEIDL uses to ensure accountability to the Commission.
- The **Administrator** handles minute-taking, recording attendance, organising venue and meals and reimbursing expenses.

2 http://www.engender.eu/documents_en.html

- The **Facilitator** is skilled in participative processes, particularly analysis and planning using visualisation techniques such as Metaplan. A facilitator is most likely to be needed at the beginning of each network's activities, and possibly approximately halfway through, when mainstreaming and dissemination need to be planned. She is brought in at the Thematic Expert's request.

Table 2: **Roles of participants in thematic network meetings**

Roles of participants in thematic network meetings	
Role	**Description**
Lead Member State	Gives overall visibility to the network Co-leads the meeting with the thematic expert
Thematic expert	Co-leads the meeting with the lead Member State, or leads it alone if no lead Member State Gives policy guidance Decides meeting dates and venues Drafts agendas
European Commission representative	Deliver thematic information Gives the Commission's viewpoint concerning choices made and objectives to achieve Ensures contact with policy units and other DGs
European Commission policy officers	Ensure policy relevance
Facilitator (*when present at the request of Thematic expert*)	Moderates participative exercises, notably Metaplan visualisation techniques Can make other contributions as agreed
Participants from MSs (*administrations, NGOs, academics*)	Work as national teams, using their complementary personal backgrounds Give input on national contexts and policies By consensus, decide on upcoming work
EU-level stakeholders	Deliver opinions in the light of their strategic orientations Contribute to reinforcing the link between the European and national contexts and policies
Administrator (from AEIDL core team)	Drafts minutes Arranges premises and equipment Manages registrations and attendance sheets Deals with meals and expense claims
AEIDL core team	Supports the whole process Is accountable to the EC

5. ANIMATING THE NETWORKS
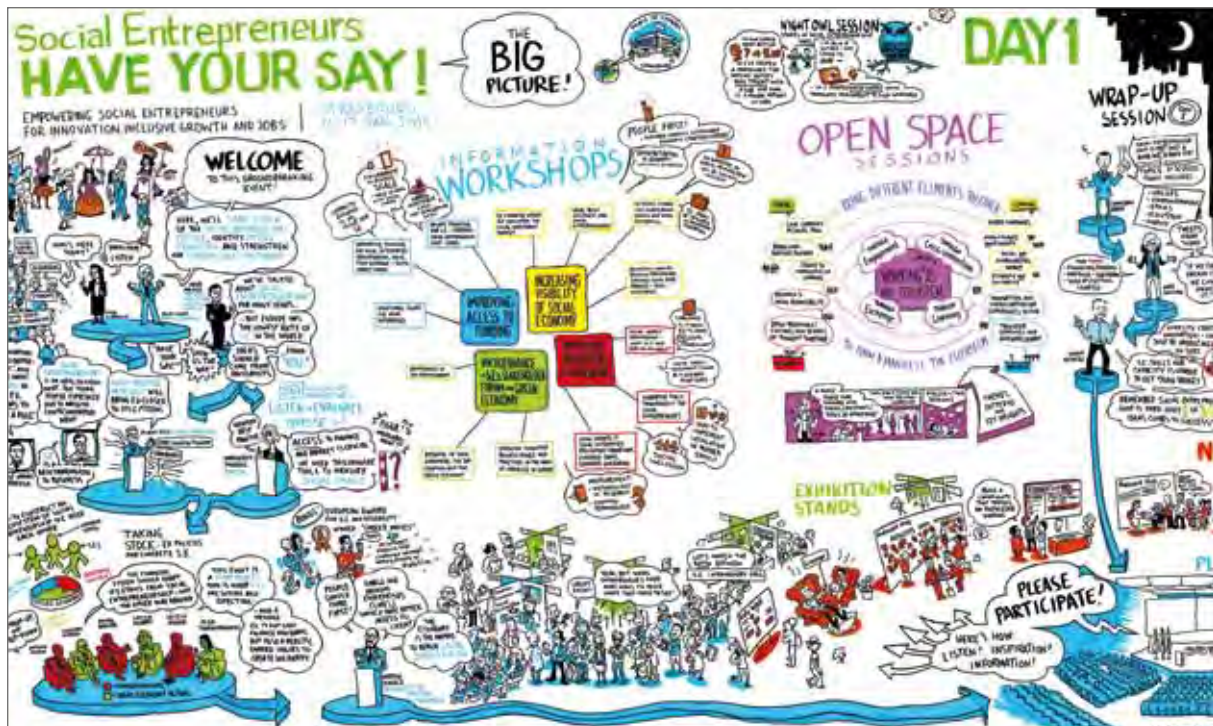
5.1. Face-to-face communication

Networks are not hierarchies and they do not achieve their goals through a system of command and control involving decision-making at the centre and obedience at the periphery. Rather, they are essentially horizontal things, in which every member is in principle equal to all the others, and in which members gain from giving and receiving in collaboration with many of their peers. Networks rely for their effectiveness on human exchange, and this in turn relies on trust. Trust is built up through rich, honest and effective communication, and by far the simplest way to create this is through meeting face-to-face.

Psychologist Albert Mehrabian famously observed that when people communicate their feelings, the actual words they use account for only 7% of their meaning, while their tone of voice accounts for 38%, and their body language for the remaining 55%.[3] It is important to remember that this finding only relates to emotional content and not factual information, but nevertheless it helps to explain why face-to-face communication is irreplaceable.

Scientific and learning communication has a much greater conceptual content, but communication consists of much more than words. Face-to-face meetings are particularly important in the early stages of a network's life, when new relationships have to be built up and a community constructed. Later on, when cruising speed is reached, much of the work can be transacted at a distance.

5.2. Governance principles

Applying the following principles on good governance in the management of the network will help to foster democratic decision-making and equality between the partners:

- **Transparency and collective responsibility**: At the beginning of the network, all partners should agree that all decision-making is carried out collectively, and that management is carried out transparently.
- **Consensus building**: Disagreements between partners on priorities or strategies may arise, in which case it is best to agree to try to find a consensus or compromise decision, which accommodates different viewpoints.
- **Respect for confidentiality**: Successful learning through networking depends on the establishment of an atmosphere of trust within which participants are willing to share not only their successes but also their failures. Nevertheless some people will understand-

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3 Albert Mehrabian, Silent Messages, 1971: http://www.kaaj.com/psych/smorder.html

ably be sensitive to exposing any weaknesses in their organisations. In such cases it may be advisable to agree to operate under 'Chatham House rules', whereby the content of the discussion may be made public, but not the identity of the speakers.

- **Gender equality and non-discrimination**: Partners should factor in time to reflect collectively on applying equality principles in the management of the network. For example, are people with disabilities able to participate in the activities of the network? Is there an issue of gender balance in decision-making positions?

- **Language and cultural differences**: Networks need to be sensitive to language and cultural differences and the impact these may have on the participation of members. In this respect, those who are chairing meetings should be vigilant in ensuring that native English speakers do not dominate the proceedings.

5.3. Engaging the participants

People contribute to networks in order to get something back. The network has to provide them with something interesting and relevant at each meeting. The success of a network depends on producing interesting and stimulating activities that provoke real change back home.

Among the activities organised by the network, meetings are the most resource-intensive exercise. They therefore need to be well planned and executed. The type of meeting that was common in transnational exchange programmes a decade ago is now totally outmoded. No one wants to experience 'death by Powerpoint' or to be talked at by people who are simply promoting their project, their ministry or their city in an uncritical manner.

The emphasis in network meetings should be on stimulating active participation and providing a rich experience:

- **Use real situations** – a structured visit to a local practitioner or project in the city or town where the meeting takes place.
- **Bring in different viewpoints** to the discussion of practice – the 360° approach – and look for ways to bring the experience of the user or client into the meeting – for example by video – even if users themselves cannot be there.
- **Make the meeting dramatic** through creative tension, informed conflict and simulation exercises.
- **Vary the techniques**, as even new facilitation techniques can become wearing after a while. You should only fill in post-it notes once or twice in a single meeting.

- **Try to create an emotional climate** that is receptive and open and allows people to speak.
- **Use professional facilitation** and preferably make this the job of someone who is not responsible for the 'content' of the meeting. Do not allocate the 'chair' to the most senior person, but to the best person at facilitation/moderation.
- **Don't allow the experts** (or the politicians) to hog the airtime.
- **Ensure that the meeting is documented** in a range of formats – including selected video clips of presentations, photographs and a written record.
- Choose **meeting rooms** where the seating can be moved and always create inclusive seating patterns. Use circles rather than rows, avoid hierarchy, and arrange seats so that all participants can make eye contact with each other and the moderator.
- **Organise the informal**. Eating together and having coffee are valuable parts of the meeting.
- **Help people to get to know each other**. Working together is a relationship and this side needs to be actively developed. You can take this further by buddying newbies with experienced members of the group.
- **Use icebreaker techniques** and 'speed meetings' at the start of meetings to warm people up, get them talking and to start the process of getting to know each other.
- **Use oversize name tags**, name cards and other methods so that facilitators and participants always

refer to each other by name. Being known and recognised is important for creating a sense of belonging.

· Use a range of techniques, such as:

  - **European Café**: participants sit at tables of six to eight people with a host and a topic to discuss. Participants usually write on large paper sheets on the table. It can operate in several phases with tables mixing after each phase.[4]

  - **Open Space**: a technique for forming workshops out of a plenary session by asking people to propose or pitch topics. Workshops then take place for one or two hours.[5]

  - **Buzz groups**: the moderator sets a question and small groups discuss it for two to four minutes. The moderator then gets feedback from each group.[6]

  - **Fishbowl**: a small group sits in the centre of the room, with an empty chair. They discuss an issue while the rest of the group observes. They can invite other participants to take the empty chair and interview them for a short period.[7]

  - **Hot seat**: one person takes centre stage and the others ask questions.

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4 http://www.theworldcafe.com/key-concepts-resources/world-cafe-method/
5 http://openspaceworld.org/wp2/what-is/
6 http://www.kstoolkit.org/buzz-group
7 https://en.wikipedia.org/wiki/Fishbowl_%28conversation%29

5.4. Using online tools

Travelling to and from physical meetings is expensive and time-consuming, and so the thematic networks are advised to make use of internet tools to share information. These might include:

· The **thematic forum** on the ESF Transnational Platform website: each network will have its own forum, access to which is given by the Thematic Expert. This will allow participants to discuss issues and to upload and comment on documents. Participants can also upload documents to the public part of the website;

· Other online communication tools such as **Basecamp** and **Dropbox**;

· **Web conferencing** (see section 8 below). Web conferences can be used to prepare and debrief physical meetings.

6. THE MEETING CYCLE

The lifespan of the networks is four years (2015-2019), and it starts naturally enough with a planning phase.

The central period of the networks' lives is concerned with two tasks:

- managing co-ordinated calls for proposal in their theme
- carrying out mutual learning activities

Towards the end of the period, more effort will be given to mainstreaming and disseminating the results of the networks' work.

Networks are free to choose their own rhythm of work. They will normally meet twice per year physically, plus at least once per year, perhaps in sub-groups, by means of web conferencing (see sections 7 & 8 below).

The EC technical assistance will also organise one annual event, alternately a thematic or methodological seminar for about 75 people and a policy-related conference for about 200 people. These will present an opportunity for members of different thematic networks to meet and share their knowledge and experience and create synergies among the networks.

6.1. The planning phase

6.1.1. Setting priorities

One of the first things to do in each network is to establish what the participants' priorities are. This will inform the baseline study. Networks that are fortunate enough to have the momentum of previous networking will be able to deduce their priorities fairly easily. Those which bring together relatively inexperienced members will need to go through a structured prioritisation exercise.

6.1.2. Baseline study

The Thematic Expert will then prepare a baseline study, which is a simplified action-oriented map. It outlines the current situation in the specific thematic area and how the network might address it, and gives participants a basis upon which they can determine feasible objectives and relevant activities. It might include the following sections.

Contents of baseline study

- The social situation, including quantitative data
- Drivers of change: force field analysis
- Stakeholder map*
- The state of the art: key (good/bad) policy approaches that have been adopted (at EU level+ notable national examples, clustering Member States where relevant)
- Issues that could/should be addressed (Where is there an added value in a transnational approach within the ESF? Under what conditions is the thematic network likely to make an impact?
- Sources & references

For guidance on stakeholder mapping in social policy see: http://www.engender.eu/documents_en.html and http://www.odi.org/publications/5257-stakeholder-analysis

Problem Assessment

Effect ↑

Cause

- Not meeting employment strategy objectives
- Disabled people do not enter the labour market in sufficient numbers
- Disabled people are not prepared to enter labour market
- Businesses rarely hire disabled people
- Interpersonal skills do not meet the needs of the labour market
- Little support with childcare
- Little support with childcare
- Businesses do not pay attention to social issues
- Training provided does not meet disabled peoples' needs
- High cost of facilities for disabled people
- Businesses receive poor support for disability issues

6.1.3. Logical framework and workplan

The logical framework ('logframe') is an almost obligatory tool in planning network activities, as it obliges participants to be crystal clear about what results they are trying to achieve and how they plan to achieve them. By enforcing thinking about cause and effect, it lays bare the assumptions and confusions that bedevil many projects. When prepared using a participa-tory methodology and visualisation tools such as Metaplan, it also ensures that all stake-holders commit themselves to common objectives and activities. The result is an overview of the network's *raison d'être* presented in a single table, which forms an invaluable reminder that can be used to prevent slippage as work progresses.

The best way to develop a logical framework is to conduct a participative workshop involving all stakeholders and facilitated by an experienced moderator.

Problem and solution trees

The first step is to identify the problems that are to be addressed, and structure them into a 'tree' showing the cause-and-effect relationships that exist among them. The roots are the causes and the branches are the effects, as in this diagram.

Some points to observe are:
- Ensure that all key stakeholders are present.
- The participants have been brought together to contribute their own particular knowledge and experience on a defined issue. Encourage them to express their views so that you get a complete picture.

- Phrase the initial problem at the right level of generality – it has to be an issue that the project can realistically tackle.
- Stay with the actual words the participants use – don't mystify the process by transforming them into jargon.
- Be rigorous in clarifying exactly what is a cause or an effect. Try to avoid defining things as an "absent solution" – a skills shortage can be solved otherwise than through providing more training – for instance by labour mobility, outsourcing or automation – so "insufficient training" is not necessarily a problem in itself.

The second step is to transform this 'problem tree' into its mirror – the '**solution tree**'. This sets out for all to see the things that have to happen for the project to be a success. These actions can then be prioritised and built into the logical framework.

Building the logical framework

The logical framework matrix is shown on the next page. It should be completed in the following sequence (as shown by the numbers in the cells), checking that the logic is correct at each step:

1. The **objectives** column (boxes 1, 2 & 3) is filled in, by focusing on the impact that is desired, the result that is necessary to achieve it, and the outputs that are in turn required to generate these results.
2. The **assumptions** and **preconditions** (boxes 4, 5 & 6, working upwards) are then completed. These are the significant external factors that are outside the project's control but which might affect its success. They describe things that must be true if you are to achieve

the objective in the row immediately above. Only include those that realistically constitute a risk. (The 'activities' and 'impact' rows have no assumptions.)

3. The **indicators** and **evidence** columns (boxes 7–12) are filled in. The indicators show how you will measure whether the impact, results and outputs have been achieved or not. The evidence shows where this information comes from. (In the 'activities' row, these are conventionally replaced by the activity budget and the source of funds.)

4. Finally the **activities** (boxes 13–16) are written in. These must be chosen because they will lead to achieving the outputs, ensuring a rational project design.

This diagram below shows the completed logical framework for the Social Entrepreneurship Network. Some points to watch:

• Define your objectives realistically.

Logical Framework

	Objectives	Indicator	Evidence	Assumptions
Impact	1	7	8	
Result	2	9	10	6
Outputs	3	11	12	5
Activities	13	14	15	16
Pre-conditions			4	
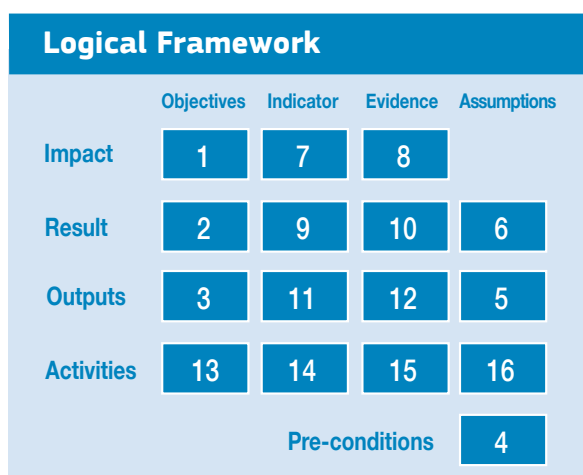
• Do not combine two ideas in one phrase – if there are two objectives, assumptions or activities then write them separately.
• If your logic check suggests a rephrasing – then rephrase and rephrase again.

Table 3: *Logical framework of Social Entrepreneurship Network*

	Objectives	Indicators & evidence	Assumptions & risks. Critical success factors
Overall objective	Social enterprises play a full role in meeting Structural Fund objectives		
Project purpose	Structural Fund Managing Authorities know about, understand and can apply in 2014-20 a set of options for a comprehensive support environment for social enterprises		Political sphere is supportive OPs have space for SE projects
Results	1. Shared understanding of the necessary components of a comprehensive support environ-ment for SEs	Summary report Closing conference	SF programmers are aware SE bodies are supportive
	2. MAs and federal bodies organising social enterprise have a shared understanding and work in partnership	Presence of SE bodies in SEN partnership Participation of SE bodies in SEN events	
Outputs	Agreed peer review method Peer review documentation Policy recommendations Clickable matrix of good practice examples		
Activities	1.1 Training in peer review method 1.2 Peer reviews of good practice 1.3 Dissemination of results 1.4 Promotion of follow-up networking 2.1 Kick-off meeting to allow all actors to understand each other's aims, capacities & constraints	1.1 Trainee evaluation 1.2 Participant evaluation 1.3 Closing event 1.4 Follow-up network is discussed 2.1 Clarity & relevance of work programme contents	Partners contribute examples of good practice Lessons are transferable

- It is helpful to number your various outputs (1, 2 etc.) and your various activities to match this (1.1, 1.2 etc.)

It is the combination of stakeholder participation, rigorous logical analysis and clear and synthetic presentation that makes the logical framework such an effective planning tool.

The activities that are decided upon can then be scheduled to create a **workplan**, which sets out the tasks to be completed, the timescale and the people responsible for them.

Resources

ESF-TCI Common Methodology no. 1 – Planning:
https://drive.google.com/file/d/0B5Fjv4SmU7wEZHV1dUI0OElTaEE/view?usp=sharing
EQUAL: Partnership Development Toolkit:
http://ec.europa.eu/employment_social/equal_consolidated/data/document/pdtoolkit_en.pdf
The URBACT Local Support Group Toolkit – Guidance for participative policy-making:
http://urbact.eu/urbact-local-support-group-toolkit-%E2%80%93-guidance-participative-policy-making

6.2. Co-ordinated calls for proposals

178 national or regional Managing Authorities, some working through Intermediate Bodies, are in charge of managing the ESF. To enable projects to build partnerships with organisations in other countries, a compatibility mechanism for the calls for proposals they decide to launch is needed, notably as regards their timing and priorities.

While oversight is provided by the ESF Committee, it is the thematic networks which are the fora within which the Managing Authorities can collaborate to ensure that transnational work meets their needs.

During the 2014-2020 programming period, calls for transnational projects will be organised in two waves, the first in 2016 and the second in 2018. These 'co-ordinated calls' are thus not calls in themselves, but umbrellas under which Managing Authorities in different countries co-ordinate their actions. So far 12 Member States have announced that they intend to take part in this co-ordination process, and several others may join in the future.

Procedure for establishing a transnational project within the co-ordinated call

- The Managing Authority publishes a call for transnational projects.
- Project promoters build a transnational partnership. They may already know suitable partners, or they can use the partner search database. In this case they first enter details of their organisation, then details of their project idea. These descriptions are either entirely in English or include a summary in English. They search for partners, and can narrow down the search using criteria such as country, theme or target group. Equally, projects in other countries can search for them. The potential partners contact each other directly, and negotiate how to structure their joint project.
- The joint transnational element of their work is enshrined in a Transnational Cooperation Agreement (TCA), drafted in English and in a common format, which describes the project's rationale, objectives, work programme, methodology and budget for each activity and each partner. The TCA thus provides each partner and each corresponding Managing Authority with an overview of the whole transnational project and of each partner's role in it. Each partner signs the TCA, which is identical for all partners. The TCA is entered into the EU database.

- Each partner submits its national application to its Managing Authority (or Intermediate Body) with the Transnational Cooperation Agreement annexed to it
- The Managing Authority evaluates the package of national project + TCA, and either accepts it, rejects it, or asks for modifications. A period of negotiation may ensue. When a Managing Authority agrees an application, it indicates this fact in the EU database.
- When all the Managing Authorities that have a project involved in a given partnership have accepted their respective projects together with the common TCA, the partnership is approved. The TCA comes into force when each project has signed the project agreement with its Managing Authority or Intermediate Body.
- If one partner is refused, the remaining partners must revise their TCA and have it reapproved.
- Each partner starts its activity with transnational activity taking place according to the TCA.

Some countries are staying outside this umbrella, and implementing the 'flexible approach' to transnationality. They may for instance publish calls allowing the financing of projects which are predominantly national but have a small additional transnational component. Projects submitted within the co-ordinated calls may be able to make partnerships with projects in countries not taking part in the co-ordinated calls if the timing and other conditions are right.

The Commission and Member States have agreed common terms of reference for the 2016 co-ordinated call, which set out the minimum criteria required for compatibility.[8]

The tasks of the thematic networks regarding the co-ordinated calls are to:
- Agree on general criteria, especially the timetable for calls;
- Agree any theme-specific parameters that Managing Authorities should include in their calls, such as priority sub-themes or target groups, project design considerations or quality criteria (see guidance note[9]);
- Facilitate liaison among Managing Authorities so that transnational partnership-building operates smoothly and problems are resolved;
- Monitor the implementation of transnationality in their theme: this will consist of discussing progress made in the participating Member States as data becomes available, taking any corrective action that may be called for and making any necessary recommendations;
- Oversee the mainstreaming and dissemination of the results, including by selecting a number of good practices for publication by the ESF Transnational Platform.

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8 https://drive.google.com/file/d/0B5Fjv4SmU7wEUWVLMUthY2FwZkE/
view?usp=sharing
9 https://drive.google.com/file/d/0B5Fjv4SmU7wEZXFFbXE0SDItanc/
view?usp=sharing

Timetable for the 2016 co-ordinated call	
Calls published in each MS	Jan-Jun 16
Optional preparatory phase	
Applications deadline	30 Sep 16
Project evaluation	
Projects start	Jan 17
Projects end	Jan 20 latest

6.3. Mutual learning

Mutual learning can take many forms. The activities that the network decides to pursue are chosen by the participants as a result of the planning exercise. It should be noted that the EC technical assistance budget covers the operation of network meetings and the time of the Thematic Expert and other support staff, but cannot pay for the substantive activities of networks. If funding for these is required, it must be found from Member State or other sources.

There are many different ways of organising the learning and exchange in a network to ensure that participants get the most from their interactions. It is obviously important to make the learning interesting and varied. Early networks in the EU relied excessively on case study presentations by experts. While these can be a useful basis for introducing a topic, they rarely allow practitioners to understand how the practice or project actually works.
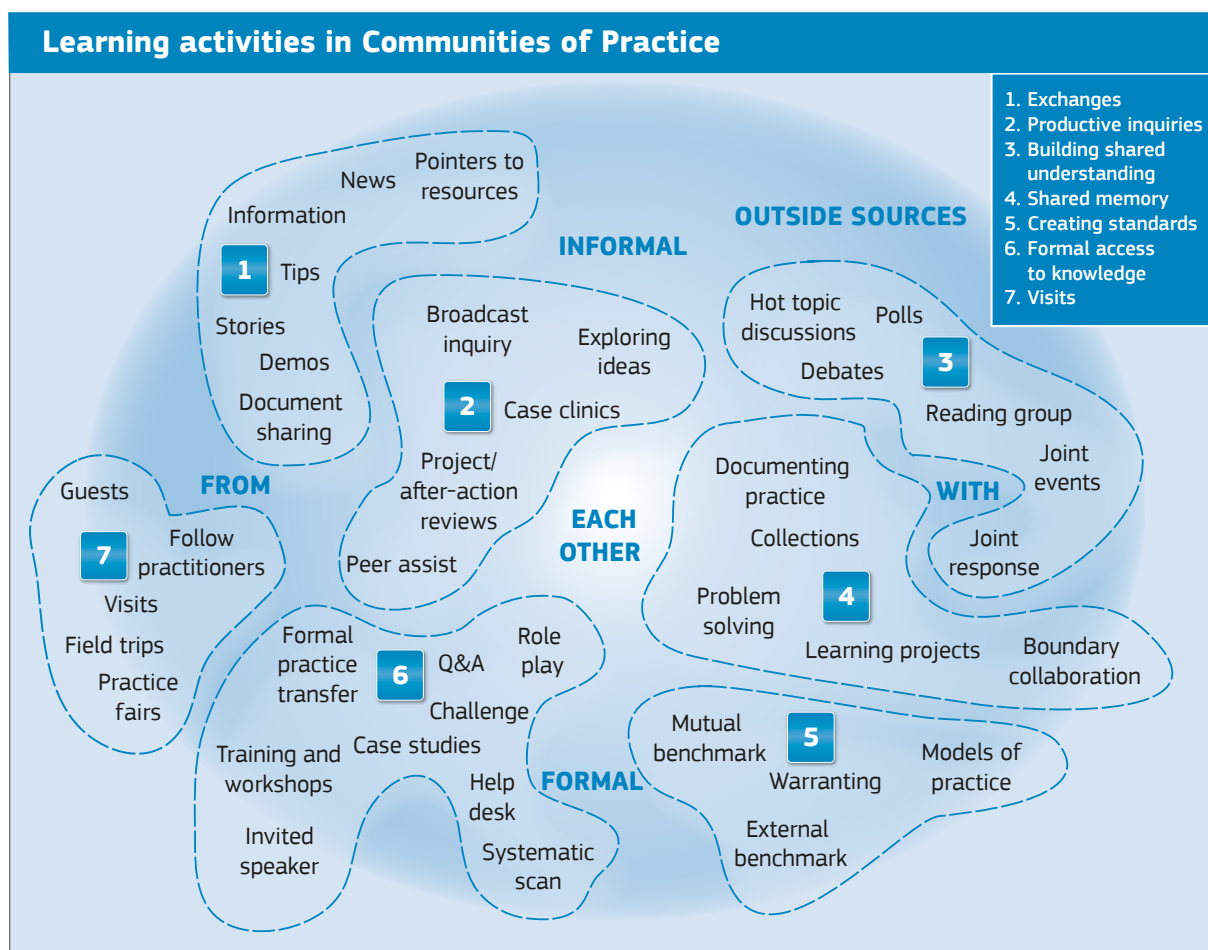
As a result, deeper approaches to learning have been pursued and developed, often drawing on learning theorists such as Etienne Wenger;[10] his diagram (see next page) illustrates the rich diversity of methods. The diagram has seven types of informal (in the top half) and formal activity (in the bottom half). Wenger differentiates between learning from outside sources in the outer ring of the diagram and learning from each other in the central ring.

Learning activities in Communities of Practice
The seven islands in the diagram cover:
1. Exchanges: e.g. news, information, stories, tips, document sharing, pointers to outside resources;
2. Productive inquiries: e.g. case clinics, project reviews, exploring ideas, broadcast enquiry;
3. Building shared understanding: e.g. hot topic discussions, reading groups, joint events, joint response;
4. Producing assets (or products): e.g. documenting practice, collections, problem solving, learning projects;
5. Creating standards: e.g. mutual benchmark, external benchmark, models of practice, warranting (certification);
6. Formal access to knowledge: e.g. help desk, training and workshops, formal practice transfer, systematic scan (of knowledge), invited speakers;
7. Visits: guests, field trips (to other practitioners), e.g. practice fairs (policy fora), visits (to each other).

....
10   http://wenger-trayner.com/introduction-to-communities-of-practice/

Learning activities in Communities of Practice

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A network that seeks to interest, involve and stimulate its members will use a variety of these methods, though rarely all. Some activities such as benchmarking, or formal transfer are of a higher order and require more maturity and structure within the network than other activities such as field visits. For the thematic networks it may be appropriate to do the easier and more straightforward activities that build understanding at the start of its work programme and then to focus on the other more sophisticated activities later on.

Most networks have to work hard at the outset to establish a shared understanding of the subject or topic under discussion. They have to learn what key words mean in different languages and other contexts. In most learning networks this aspect is developed first by discussing practice in the form of case studies. These can either be drawn from the partners themselves or be brought in to the network from other practitioners. Often thematic experts play this role in meetings but it is even better when practitioners can talk first-hand about their experiences.

Resource
ESF-TCI Common methodology 2 – Organising: https://drive.google.com/file/d/0B5Fjv4SmU7wEUHdGMjN6N0k4aGM/view?usp=sharing

Some types of activity which have proven fruitful in previous networks are presented below.

6.3.1. Good practice
By identifying and disseminating examples of good practice, networks can bring lessons home to practitioners. Good practices are often held to be those which fulfil the criteria shown in the table on the next page.

Networks may wish to take other criteria such as empowerment, accessibility, equality, innovation or transferability into account.

The EC technical assistance team will work with the thematic networks to publish a compendium of good practice containing 40 cases.

Table 4: **Suggested criteria for selecting good practice**

Relevance	• Is there evidence or examples of how the project has met needs on the ground? • Did the results fill policy gaps?
Effectiveness	• Were outputs measured and results evaluated? • Is there evidence or examples of the difference or value added?
Efficiency	• Can the project provide evidence that resources were used efficiently to deal with particular contexts and target groups?
Impact	• Is there quantitative and qualitative evidence of the wider impact? • Does the monitoring and evaluation process demonstrate the broader impact? Do the major stakeholders approve?
Sustainability	• Have the project's lessons been used elsewhere? • Has practice or policy changed in accordance with the project's aims?

6.3.2. Peer reviews

Peer review is a mutual voluntary learning process between well-qualified equals, based on the systematic exchange of experiences and the evaluation of policies, actions, programmes or institutional arrangements. Where appropriate, the peers' understanding of how an initiative works can be greatly enhanced by making a **study visit**.

The following diagram gives an overview of the actors and processes involved.

The peer review process involves identifying themes for review, choosing cases which illustrate these themes to examine in detail, drawing up formats for review documents, holding an event at which the case or cases are discussed, and publishing the results.
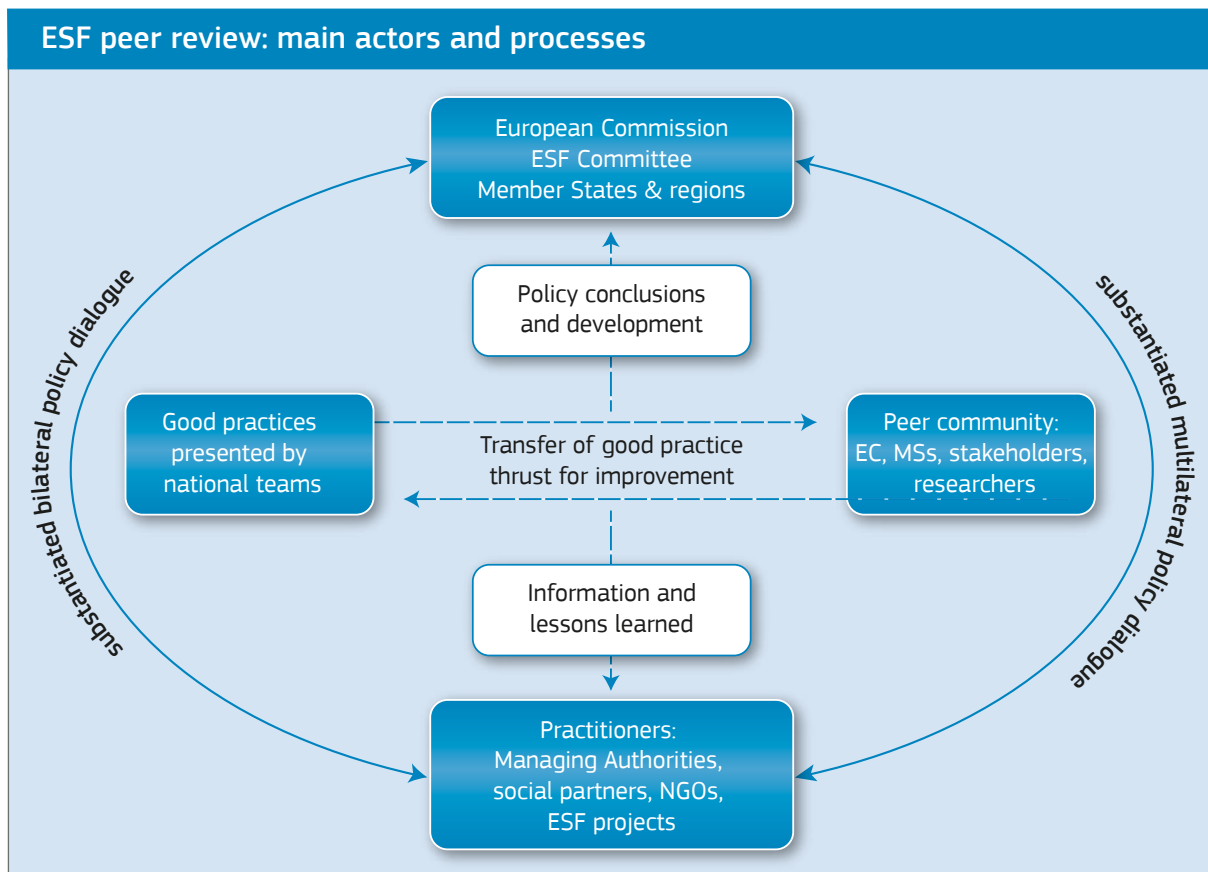

ESF peer review: main actors and processes

Table 5: **Peer review timetable**

Weeks	Action	Documents
-12	initial scoping paper to clarify the issues in the cluster, and define what can be learnt and who needs to learn it	scoping paper
-10	collection of contrasting good practices from among partners (and possibly elsewhere), and choice of which to study (partners to supply short analytical profiles)	cluster briefing paper
-7	writing of case studies (<10 pages) of 3 examples, showing different approaches and where possible from different countries	case studies
-4	writing and circulation of comparative background paper (+/-15 pages) setting the initiatives in their policy and practice context, and discussing the strengths and weaknesses of the contrasting approaches to the problem	comparative background paper
-2	peer comment papers (2-3 pages): brief summary of situation in own country regarding cluster theme, challenges and issues; then discussing relevance/utility of background paper cases to participating country/region (circulated before the event to allow digestion)	peer comment papers
0	peer review meeting (1.5 days) including site visit to a relevant local example of good practice, if one exists	
+2	writing of summary report, including policy implications (+/- 20 pages)	summary report
+4	peer feedback	revised summary report
+6	publication	

It can be implemented in many ways, and one example which has shown good results is given here.[11] In this example, groups of three contrasting approaches to a given topic are reviewed comparatively in each cycle. The necessary process and timetable are shown in the table above.

The clusters of issues to be studied were defined at a participative logical framework workshop. Network participants, working in national teams comprising the ESF Managing Authority plus a stakeholder organisation, were asked to submit possible good practice cases for review. The most relevant were selected, to bring out the advantages and disadvantages of contrasting approaches in different contexts, and case studies of each of them were commissioned. These were circulated to the peers, who responded with their comments (also compiled by a partnership between the ESF Managing authority and the stakeholder organisation). The peer review meeting was then held and the results compiled.

Peer review meeting format

A possible format for a peer review meeting is shown in the table on the next page.

Peer review documentation

The process is quite paper-heavy and requires intensive work by participants. The documents used are as follows:

· Initial **scoping document** defining the issues to be covered during the seminar and developing a conceptual/thematic framework;

· **Case studies** (normally three) of contrasting approaches to the issue. These include a summary of the approach, the history of how it developed, the policy framework including funding, results, criticisms, comparisons with alternatives (in same territory or elsewhere) and assessment;

· Comparative **background paper**: this sets out the common issue being investigated including the conceptual/thematic framework, present the three contrasting approaches – paying due attention to the context (economic, social, cultural, institutional, etc.) that has produced them – analyse the strengths and weaknesses of the approaches, and compare and contrast them.

· **Comment papers** from each partner territory

Table 6: **Peer review meeting format**

Day 1	
11:00	Welcome, presentation of programme, recap of roles
11:15	Presentation of comparative background paper and discussion
13:00	Lunch
14:00	Site visit (if any)
16:00	Tea
16:30	*Tour de table* of peer countries/regions (around 10) which present their comment papers, followed by discussion on the relevance, feasibility and sustainability of the approaches presented.
19:00	End
Day 2	
09:00	Split into groups of < 10 to discuss (1) effectiveness; and (2) transferability
10:30	Coffee
11:00	Feedback from small groups
12:00	Conclusions – key lessons learned
13:00	Lunch & depart

attending (normally all Member States/regions): they should summarise the situation in the country regarding the theme and the challenges and issues, give an overall assessment of the effectiveness of the approaches, including salient compliments and doubts, issues that the approach provokes in the home context, similar approaches that have been taken or might be taken "at home", and an assessment of effectiveness and transferability;

- **Summary report**: this covers the various characteristics of the approaches examined, the points raised in the comment papers, discussion and workshops, an analysis of what makes the cases good (or bad) practices, policy implications at various levels, and guidelines for Structural Fund involvement.

Resource

ESF-TCI Common Methodology 4 – Peer review:
https://drive.google.com/file/d/0B5Fjv4SmU7wEMHhSLVE4NGh6eUU/view?usp=sharing

6.3.3.   Benchmarking

Benchmarking is a comparison technique to identify and implement best practice. The basic idea is straightforward:
- find an organisation that is best at what your own organisation does
- study how it achieves such results
- make plans for improving your own performance

- implement the plans
- monitor and evaluate the results

Benchmarking has many similarities to peer review. The difference is perhaps that bench-marking is a more instrumental practice and can, if necessary, be carried out by experts in the shape of 'benchmarking studies'.

For the purposes of disseminating evidence-based policy, good benchmarks are invaluable because they give policy-makers an indication of how their performance compares to the 'best in class'. They are nearly always about measurement. For this reason benchmark studies are usually highly focused and quantitative – for example focusing on the cost of delivering training places of a particular quality, or the cost of providing job coaching services.

Resource

International Benchmarking Experiences from OECD Countries, OECD, 1997:
http://www.oecd.org/governance/budgeting/1902957.pdf

6.4. Mainstreaming and dissemination

Each thematic network should aim to produce concrete results, and these should be communicated to policy-makers (vertical mainstreaming) and to practitioners (horizontal mainstreaming).

Mainstreaming and dissemination need to form part of the logical framework drawn up at the start of the network's life. At about the halfway stage, as the likely results take shape, an explicit mainstreaming plan should be developed.

6.4.1.   Policy – vertical mainstreaming

The right messages for the right people

Influencing policy depends on gaining policy-makers' attention by providing well-argued solutions to relevant problems. Success thus depends not only on a good analysis of the policy framework and the quality of the solutions offered, but the quality of the evidence that backs them up. The following techniques may prove useful:

- Tackling an important social issue where *prima facie* there are significant **benefits** to be gained from change. Create messages around those benefits.
- Tackling an issue where there is the **political opportunity** for policy change – that is to say where the 'wind is behind you'. This might be rephrased as 'don't bang your head against a brick wall'. Some issues that engender moral disapproval are persistently resistant to evidence-based policy change.
- **Targeting**: identify at the outset which policy-makers need to be influenced.
- Identifying what **data** need to be collected in order to be able to demonstrate that change is needed.
- Enlisting natural **allies** and co-opt potential opponents: involve influential stakeholders who might either amplify or block your progress. These might be lobbyists on behalf of the target group you are aiming to help, or providers of the services you believe should be improved, or the authorities that would eventually have to foot the bill.
- **Tailoring messages** to the different audiences: phrase things in terms of solving the problems that your different audiences are faced with. Often you will be able to present a 'win-win' solution that not only answers a concrete need, but relieves government from political pressure or controversy.
- **Combining values with data**: construct arguments that are convincing to both politicians and administrators. Show how your proposals fit into broader political programmes, as well as how they will improve the statistical outcomes.
- Using the right **channels**: written documents and websites are fundamental – but why not also use video, YouTube, Facebook, Wikipedia, parliamentary receptions, and newsworthy events of all types?

- Citing **telling examples** full of human interest – as newspapers know, 'a picture is worth a thousand words'.

Policy brief

Busy policy-makers can be reached through the concise packaging of results in a way which addresses policy goals. A possible format for a policy brief is that used in EQUAL. Since EQUAL aimed to stimulate innovation, the brief is designed as a two- to four-page document presenting a convincing story and advocating specific lessons such as policy principles, delivery mechanisms or activities. Each policy brief includes five sections, as shown below.

Policy recommendations brochure

A second format that is worth considering is a concise, attractively laid-out brochure presenting policy recommendations in different thematic areas, each illustrated by a practical case. This enables busy decision-makers to zero in on the questions that interest them, read lively examples and get some quick hints for the changes needed.

Contents of policy brief

- **Title**: presents the key message strikingly
- **Summary**: outline of the specific issue/problem that is addressed
- **Relevance** of this specific issue (in concrete terms, and adapted to the target audience) highlighting:
  - its significance in the European policy framework or context (policy objectives, issue on the agenda, missing element, etc.)
  - its empirical relevance (in terms of people or organisations concerned, demonstrating it is not a unique problem)
- **Solutions**: presentation and explanation of the new solution(s) tested, illustrated by concrete cases and outlining:
  - the factors identified that can make a difference
  - the specific policy principles, delivery mechanisms, activities, etc. tested
  - the evidence that demonstrates the added value (hard facts, credible witnesses/champions, etc.)
  - identified ways to transfer (opportunities to integrate the validated solutions into policy and practice; defensive points for handling counter-arguments and sceptics)
  - the experience, expertise, tools, guides, training material, quality standards, etc. that can be shared
- **Conclusion**: policy recommendation / recommended approaches / lessons learned

Format of policy recommendations brochure

A suitable format is about 32 A5 pages, with a catchy title and an accessible layout using colour and illustrations. Each recommendation can be set out as a two-page spread addressing a specific area of interest:
- a half-page summary of the policy issue
- several recommendations
- a journalistic case study illustrated by a photograph

An example of this is *A WISE Way of Working*.*

*http://www.diesis.coop/index.php/component/content/article/2-uncategorised/49-wise-project-quoted-in-ec-communication-on-social-business-initiative

6.4.2.   Practice – horizontal mainstreaming

Practitioners are often on the lookout for examples of successful projects in the themes that interest them. **Case studies** come in many shapes and sizes, but to be really useful they need not just to describe but to analyse. They need not only to tell a particular story in a coherent and engaging way, but also to dispassionately analyse the objectives, achieve-ments, methods, successes and failures. They are best prepared by taking a 360º approach, that is by obtaining the opinions of all stakeholders, including funders, beneficiaries, partners and competitors. Research is best done through a site visit backed up by documentation and telephone interviews. An effective way to present case studies is as follows.

Format of case study

- a catchy title
- a standfirst which summarises the key messages in 5 lines
- description of the context, the actors and the problem tackled
- the approach taken and methodology used
- a description of the interesting aspects of the case (not necessarily exhaustive)
- an analysis of how the methodological principles adopted have been applied, and whether they have worked well, as regards both as the process used and the results. Depending on the theme, this might concern empowerment, equality, partnership, innovation etc.
- illustrative quotes from several participants and beneficiaries
- several photographs

An appropriate target length is 4 pages (2,000 words).

Resources

Making Change Possible – the EQUAL guide to mainstreaming:
http://bookshop.europa.eu/en/equal-making-change-possible-pbKE7105287/
ESF-TCI Common Methodology 8 – Mainstreaming:
https://drive.google.com/file/d/0B5Fjv4SmU7wETXVIQ2d4QmpVX28/view?usp=sharing

6.5.   Evaluation of the networks

AEIDL evaluates participants' opinions of each thematic network meeting, and holds review sessions among the Thematic Experts. It also monitors the queries it receives so as to improve its level of service.

However the EU technical assistance contract makes no provision for the evaluation of the thematic networks. If networks wish to evaluate their performance, and if funding can be found for this, previous networks have found that a formative evaluation by a **critical friend** is very effective. This method takes place throughout the network's life, not just at the end when it is too late to change anything. It works through the presence of an experienced evaluator with some knowledge of the policy area, who observes the network's activities, watches out for possible problems, and asks questions when he or she feels corrective action should be taken. This can be very useful in correcting over-cosy relationships that can lead to 'group-think' and in preventing participants from becoming so wrapped up in their work together that they forget about their responsibilities to external actors.

7. MEETING FORMATS

Physical meetings normally take place in Brussels, but may take place elsewhere.

The timing and format of network meetings is decided by the participants, under the guidance of the Lead Member State and Thematic Expert. The format normally adopted runs over 1½ days, starting at lunchtime on day 1 and ending at about 4 p.m. on day 2. Some networks have chosen to start in the afternoon, have a working dinner and end at lunchtime on the second day. Others have chosen to start in the morning of the first day and end at lunchtime on day 2.

The following running elements have proved useful:

- **Energisers**: short exercises involving movement and self-expression that wake participants up.
- **Elevator pitches**: A round of 1-2 minute presentations enables network participants to get over the key points of why they are there and what they wish to achieve. As well as interesting others in what they can contribute, presenters must be disciplined. Pitches must be kept short and should be summarised on one Powerpoint slide.
- **Motivational speaker**: a half-hour slot which brings participants up to speed with an aspect of policy, a philosophical issue or a striking experience.
- **Small groups**: Participants greatly appreciate the chance to interact with each other in small groups
- **Dinner**: Eating an evening meal together is an important way to build a group spirit among the network participants. All should be encouraged to attend, although it is a matter of personal choice.

8. WEB MEETINGS

Web meetings play an important role in sustaining the-matic networking at a reasonable cost. In principle they are more efficient than travelling halfway across Europe to meet in person. However communicating over the web or phone has a narrow 'bandwidth' and is emotionally cold. The social aspect is lacking and there are no coffee-breaks during which conflicts can be defused and compromises reached. It is undeniably a less enjoyable experience than a face-to-face meeting. Of course it is possible to hold a semi-web conference, i.e. a physical meeting with added people taking part by computer.

8.1. Web meeting tips

- In the absence of visual feedback among participants, the meeting leader has a much greater responsibility
- Offline preparation is much more important – in particu-lar a clear agenda
- With meeting of more than 10, it is probably best for the leader to control access to the microphone and to mute everyone else. Participants should use the 'put your hand up' button when they wish to speak
- People must sit near their microphone and speak clearly and not too fast
- An explicit check-in and checkout help orient participants
- To aid clear decision-making, you can ask people to use the 'raise your hand' feature or type "yes" or "no" in the chat box.
- Participants can use 'chat' not only to share messages with everyone, but also with particular individuals.

8.2. Web learning formats

Some possible web learning formats are.

8.2.1. Peer review

A peer review session in which a group of 5 Member States critique a case from each of the countries could be organised as follows:

- The cases to be reviewed are agreed and each Mem-ber State writes up a text document and a powerpoint. These are distributed to participants, e.g. by e-mail / the thematic network's forum on the ESF Transnation-al Platform website / Slideshare (if public);
- Participants post their comments and raise questions they wish to see answered on the thematic network's forum;
- A 2-hour slot is agreed to review each case. These might be scheduled e.g. one per day at 2 p.m. every other day;
- In turn, the presenting Member State experts present the cases by webinar (1/2 hour), sharing the power-point on screen. During the talk, presenters can pause to invite questions, and/or participants can give pre-senters warning of questions in chat box. A Q&A ses-sion follows;
- The expert writes up and distributes the conclusions, and a final web conference discusses them before they are published.

8.2.2.   Interview

Participants can be invited to submit questions beforehand, and these can be pre-notified and displayed on-screen.

A project or programme could be investigated through a series of interviews with different classes of stakeholder, which build up into a 360º picture.

8.2.3.   Panel discussion

These can be semi-scripted and participants can also be invited to pose issues for debate beforehand. They can be entertaining and unpredictable, and always need a moderator.

8.2.4.   Sandwich

This could work like an online version of a 3½-hour semi-nar containing a breakout session:

*   45-minute opening plenary webinar e.g. for 30 people, with interactivity controlled by the presenter. Audience members wishing to speak 'put their hands up' or use chat, and the presenter gives them the floor in succession. This interactivity needs to be scheduled by an or-ganiser apart from the presenter;
*   15-minute break;
*   Several parallel 1-hour interactive web conferences (e.g. 3 of 10 people each);
*   half-hour break;
*   1-hour closing plenary with reports back and moder-ated Q&A session.

8.2.5.   Sub-groups

A thematic network could split in two to discuss, for in-stance, separate sub-themes like Mobility and NEETs. The two sub-groups could meet at the same or different times. Staggered times are less tiresome technically as fewer people are conferring simul-taneously, but require more moderation time.

8.2.6.   Brief and debrief

Web conferencing can also be a very effective way of pre-paring for a physical meeting, and then analysing the re-sults and follow-up afterwards.

Resources

Web conference guidelines:
https://drive.google.com/file/d/0B5Fjv4SmU7wEWUFXZ1hFM3VtSjQ/view?usp=sharing

The 7 Biggest Mistakes You Can Make in Web Conferences, Gihan Perera:
https://l1.osdimg.com/online/dam/pdf/en/resources/wp/Gihan-Perera-Citrix-The-7-biggest-mistakes-you-can-make-in-web-conferences-white-paper.pdf

Memorable webinar formats to try:
http://www.lifelearn.com/2015/07/28/5-memorable-webinar-formats-to-try/

9. SOCIAL INNOVATION
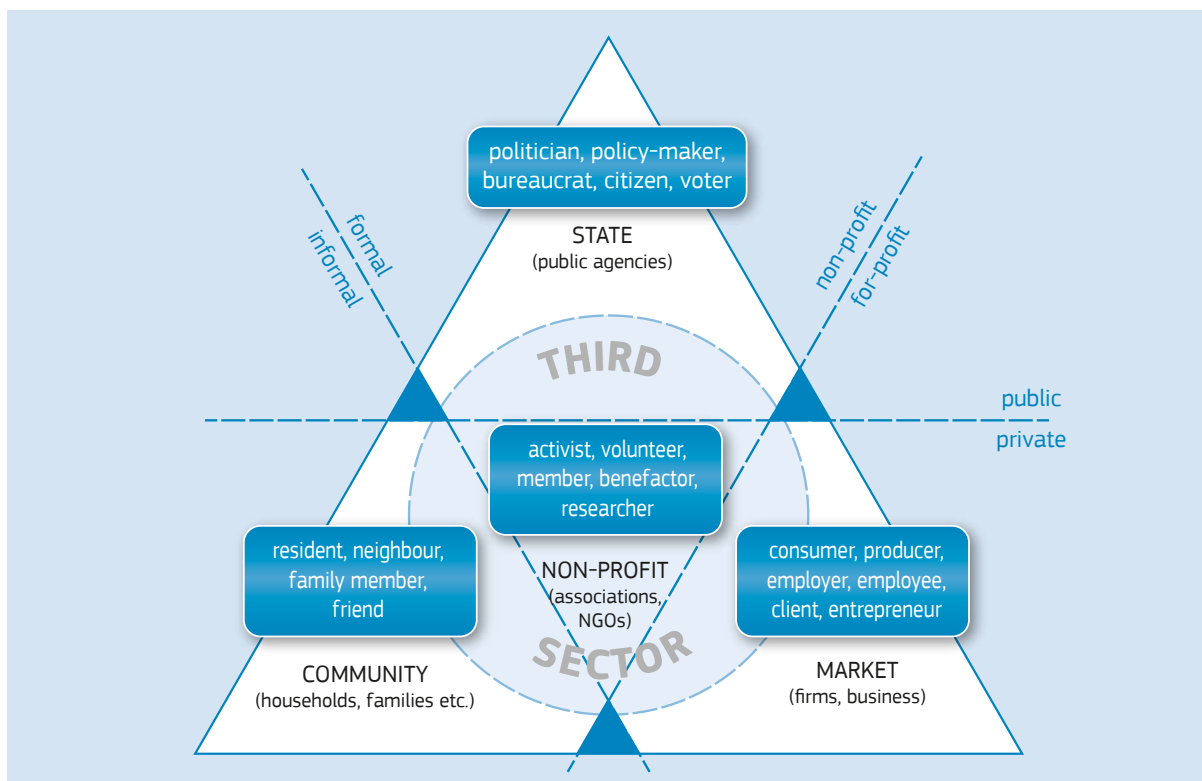
Excerpted from Flor Avelino & Julia M. Wittmayer, A Multi-actor Perspective on Social Innovation

9.1. The concept of social innovation

Social innovations are usually defined as things that involve a change in social relations – they are innovative in their means as well as their result:

Social innovations are "new ideas (products, services and models) that simultaneously meet social needs (more effectively than alternatives) and create new social relationships or collaborations. In other words they are innovations that are not only good for society but also enhance society's capacity to act." (European Commission – BEPA) 2010.)[12]

New actors, renewed interactions between stakeholders and new financing models imply a cultural shift for public authorities that want to make the most of social innovation.[13]

Social innovation is mainstreamed in the work of the thematic networks.

12 Report *Empowering people, driving change – Social Innovation in the European Union* http://ec.europa.eu/DocsRoom/documents/13402/attachments/1/translations/en/renditions/native
13 Flor Avelino & Julia M. Wittmayer, *A Multi-actor Perspective on Social Innovation:* http://www.transitsocialinnovation.eu

9.2. Four questions for thematic networks to consider

- Are the participants aware of what social innovation is, how it works, what it implies, why it is increasingly promoted?
- What are the elements of a strategy to support social innovation within the ESF?
- To what extent does considering a given policy issue in the light of social innovation lead to a change of perspective?
- To what extent is the ESF used to support solutions which are 'out of the box', non-consensual, risky and co-created?

9.3. Ways to add a social innovation element to the work of thematic network

- Hold an innovation event.
- Each good practice could be examined at the end of discussion about its innovative potential by reflecting on the following questions:
  - Is it a product, process or system innovation? What elements prove this?
  - If not, what could be done to enhance its impact

Table 7: **Social innovation issues for thematic networks to consider**

Theme	Issue
1. Employment	How are global trends (demography, climate, technology, migration...) affecting labour markets: • Where are the growth niches? • Where are the niches in decline, where conversion and reskilling are needed?
2. Inclusion	How can SI improve social services, community facilities and incomes? Is there a need-driven method of creating social innovations? Are certain groups in society excluded from being social innovators, or benefitting from SI?
3. Youth employment	Young people are enthusiastic about social innovation and social enterprises. Are facilities like incubators attractive to them? Do young people face specific barriers when doing SI, e.g. raising finance? Are microfinance and crowdfunding solutions?
4. Learning & skills	Do schools and colleges teach innovation and entrepreneurship? What skills do social innovators need? Are there new ways to develop these skills?
5. Social economy	Do social economy movements devote enough energy to SI? Is there a role for specific tools? Do support organisations need to reorient themselves? How does the SE's focus on participation promote SI? Are open source principles in conflict with commercial success? Is crowdfunding used widely enough? Would more funds such as the European Social Entrepreneurship Fund (EuSEF) be useful? Can lessons on ownership and financial participation be mainstreamed to conventional businesses?
6. Governance	What goals can SI help to achieve? Does SI challenge transparency and democratic accountability? How do administrative structures need to change? Can working with new stakeholders make SI easier? Do procurement policies need to be adapted?
7. Simplification	Measuring results rather than inputs ought to be a great boost to SI. Do SCOs make SI easier to do in practice? Can simplification support the definition of clearer and more effective goals, actions and partnerships for SI?
8. Partnership	Can working with new partners be a way to introduce SI? What partnership models are useful in stimulating SI? What degree of stakeholder involvement is possible and appropriate?
9. Migrants	Do immigrants have specific skills that can create new services? Do they have new needs that require SI to address?

and take it to another level (if possible) by adding an innovative dimension to it?

– Could new actors, new types of experts (multi-disciplinarity), new IT tools or new inspirations be useful?

• Experts and Member State representatives could engage the end users (citizens, target groups of main actions taken by Member States within a certain theme) in some kind of participative, informal consultations, using for instance available and free online tools.

Resources

Social innovation guidelines: https://drive.google.com/file/d/0B5Fjv4SmU7wEaTBzT0NZYVZBejQ/view?usp=sharing

10. GENDER MAINSTREAMING

Gender mainstreaming is also mainstreamed in the thematic networks' work. It means assessing the different implications for women and men at all stages and levels of any intervention, for instance during the preparation, design, implementation, monitoring and evaluation of policies, regulations, programmes and projects. The aim is to promote equality between women and men in all spheres of life.

It is embedded in an EU policy framework which includes the EU 2020 Strategy, the Employment Guidelines, the Strategy for Equality between Women and Men 2010- 2015, the New European Pact for Gender Equality for the period 2011- 2020, and the European Code of Conduct on Partnership.

The Standard on Gender Mainstreaming[14] contains guidelines on how to do gender mainstreaming in the policy cycle of the ESF.

10.1. Checklist for thematic network baseline studies

- Where possible gather gender disaggregated data and, if available and relevant to the theme of the network, by age band;
- Identify the main gender issues for the main themes and sub-themes;
- Elaborate on the gender aspect of the main themes and sub-themes.

....
14 http://standard.gendercop.com/

10.2. Checklist for thematic network work programmes

- When drafting the work programme, integrate the data and the gender dimension of the themes and sub-themes identified in the baseline study;
- It is anticipated that on the integration of data and the gender aspect of the themes and sub-themes that the thematic network expert may need specific input.
- If you intend to consult with stakeholders or convene a focus group, try to ensure, if possible and if relevant, a gender balance.
- Take the 'dual approach', that is to say both mainstream gender equality and take positive actions, in the form of projects for example, to redress inequalities. The network might assess whether there is a need to set up a permanent or temporary working group to examine emerging trends on gender on any of the main themes or sub-themes.

10.3. Annual monitoring

It is proposed to monitor the implementation of gender mainstreaming every year. This will include:

- Assessing whether the key issues identified in the baseline study are still relevant
- Assessing the work programme
- Assessing whether the capacity of the members of the thematic network has been enhanced

Resources
Gender mainstreaming guidelines:
https://drive.google.com/folderview?id=0B1OvclAi2z7fZFBiV2 V1OW1BblE&usp=sharing

11. TRAVEL AND ACCOMMODATION REIMBURSEMENTS

Participants in thematic networks should organise their own travel and accommodation and claim reimbursement afterwards from AEIDL.

Travel and accommodation costs can be reimbursed for:
- per Member State taking part in the common theme in question:
  - one member of staff from a Managing Authority or Intermediate Body
  - one policy expert, who would preferably be a national NGO or social partner representative or an academic;
- per Member State not in that common theme: 1 observer representative
- three invited stakeholders (normally EU level)
- Representatives of regional authorities may only claim reimbursement if they have a specific mandate from their national Managing Authority.

All reimbursements of travel expenses, daily allowances and/or accommodation allowances shall be made to one and the same bank account.

Reimbursements for government participants shall be paid into an account in the name of the Member State, one of its ministries or a public body, unless the participant obtains an official derogation.

Travel

Expenses should be rational and cost-effective. Please use low-cost fights where possible and buy flight/train tickets as soon as the meeting date is confirmed. In general, for journeys of less than 400 km (one way) participants should choose rail travel, and for distances of more than 400 km economy class air travel. The reimbursement will be based on the real costs incurred.

Costs of additional national representatives or costs exceeding the maximum ceiling should be borne by the Member State; however some exceptions may occur (to be discussed directly with AEIDL).

The absolute ceiling for travel reimbursement is €800, if justified. However in most cases we would expect costs to be far lower. We rely on participants to keep costs low in order to ensure the sustainability of transnational networking.

Participants should buy tickets as early as possible in order to minimise costs. The cost of travel cancellation insurance is provided for in the daily allowance.

Accommodation

The allowance for accommodation is €100 per night, which will be reimbursed as a flat rate. The number of nights may not exceed the number of meeting days + 1.

Daily allowance

The allowance is paid for meetings away from the participant's normal place of work. It is paid for each day of the meeting at a flat rate to cover all expenditure at the place where the meeting is held, including for example local transport (bus, tram, metro, taxi, parking, motorway tolls etc.), as well as travel and accident insurance.

The daily allowance is a fixed rate of €37 (after deduction for meals) and is paid fractionally for part days. AEIDL will provide lunch and dinner. All participants who register for the dinner will be welcome to take part (whether or not they claim back the daily allowance).

If the place of departure is 100 km or less from the place where the meeting is held, the daily allowance is reduced by 50%.

Government representatives will receive a daily allowance for each day of the meeting and, where appropriate, an accommodation allowance, on condition that they declare on their honour that they are not receiving a similar allowance from their own administration for the same visit.

Meeting participants must provide the secretary of the meeting with the documents necessary for their reimbursement within 30 days of the last day of the meeting:
- filled in and signed expenses claim form provided by AEIDL
- original invoices and boarding passes/tickets

Resource

Reimbursement guidelines:
https://drive.google.com/filed/0B5Fjv4SmU7wENEt1ZGpldlhzb2M/view?usp=sharing

TRANSNATIONAL COOPERATION IN THE ESF 2014-2020,
an introductory guide (version 2 – November 2015)

This guide sets out the rationale for transnational co-operation in the ESF and describes the components of the Common Framework established in the 2014-2020 period to remedy the shortcomings experienced in the previous period. These include the common themes, the co-ordination of calls for proposals, the thematic networks and the EU-level platform. It also covers the possibilities of the flexible approach, the mainstreaming of gender and social innovation, and how the ESF can contribute to Macro-Regional Strategies. It concludes with answers to frequently asked questions, references, a list of National Contact Points and an extract from the relevant legislation.

This publication is available in electronic format in English.

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