



**EUROPEAN COMMISSION
DG EMPLOYMENT, SOCIAL AFFAIRS and EQUAL
OPPORTUNITIES**

**EVALUATION
OF
10 SELECTED EQUAL COMMUNICATION AND
LEARNING PLATFORMS RUN IN 2007**

**Deliverable 7: Evaluation of the EQUAL Policy Forum for reducing
racial discrimination at work and in the labour market in Europe (*Euro-
Platform Acting against ethnic discrimination in employment*)**

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Index of contents

1. Introduction: scope, sources and limits of this evaluation exercise	3
Reminder of the main characteristics of the platform:	4
Evaluation questions – a reminder	5
2. Rationale	5
2.1 Analysis of the promoter’s rationale.....	5
2.2 Analysis of the Commission’s rationale and of the relevance of the platform for mainstreaming at the European level	6
2.3 The format of the platform.....	7
a. Targeting.....	8
b. Methodology for debating and transferring to policy.....	10
3. Effectiveness	12
3.1 Achieving the objectives of the call.....	12
3.2 Potential and emerging impacts	15
4. Organisation	17
4.1 Coordination	17
4.2 The role of experts	18
4.3 Practical arrangements	19
5. Conclusions and recommendations	22
Annex 1 – Evaluation questions	24

1. Introduction: scope, sources and limits of this evaluation exercise

This report is the seventh of a series of 10 evaluation reports on 10 selected EQUAL communication and learning platforms run in 2007. It is both a stand alone document, corresponding to the evaluation of one of the platforms selected by the European Commission following the restricted call for proposals VP/2006/007, and a contribution to the final synthesis report.

The report has been prepared on the basis of:

- *A documentary review of the following*: tender specifications, application, documents elaborated for the Forum (i.e. ‘*Context Notes*’, the programme of the event, a synthesis of the 5 Peer Reviews seminars and their outcomes, a synthesis of the results of the Media and Diversity working group, a synthesis of the recommendations (‘*The top 10 recommendations*’), the ‘*Palette of Projects*’ gathering data on the DPs presented in the Peer Review seminars as well as in the Media and Diversity seminars, as well as a magazine entitled ‘*Portraits of experience*’ based on 11 initiatives led in various countries).
- *2 interviews with the platform organisers*: the coordinator of the French Managing Authority (MA) and a representative of the French National Support Structure (NSS), Racine.
- *1 interview with the European expert* appointed by the European Commission to support European thematic work throughout the duration of the EQUAL initiative;
- *E-mail and phone interviews with 8 participants in a potential user role*, from:
 - A local organisation working in the field of inclusion (old Member State);
 - A small company (old Member State);
 - A trade union confederation (old Member State);
 - A national agency for refugees (old Member State);
 - Three Managing Authorities (one from a new Member State, two from old Member States¹); and
 - A NSS (old Member State).
- *Interviews with 3 practitioners*: 3 DP representatives (2 from old Member States, 1 from a new Member State) who illustrated recommendations in the Interactive Forums.
- *Interview with 1 moderator*.
- *The observation of the Forum in Paris*.

The platform is not limited to the organisation of a Forum, but also includes follow-up activities until May 2008 at least. These activities included the write-up of policy briefs, due by March 2008 and of the final report by May 2008. Thus the present report had to be written up before the whole process has been completed.

This report has to be read in conjunction with Deliverable 1, i.e. the evaluation report for the Peer Review Seminar in Paris (8/9February 2007) with employment intermediaries: both events have been promoted by France, and the applications were merely similar. The Policy Forum was tellingly called either ‘the platform’ or ‘the visibility event of the platform’ throughout the application.

¹ One of them is Portugal: there is no point in keeping this anonymous, as the intervention of the Portuguese MA were quite specific, as will be seen below.

Reminder of the main characteristics of the platform:

The main characteristics of the platform are provided below, in order to facilitate the reading of the report, and to subsequently facilitate the comparison between different types of platform.

Table 2 – Synthetic platform description

Title:	<i>‘Conférence Européenne EQUAL pour faire reculer les discriminations raciales dans l’emploi en Europe’</i> [EQUAL Policy Forum for reducing racial discrimination at work and in the labour market in Europe ²].
Type:	Policy Forum
Lead MA:	France
Platform co-organisers:	Germany, Sweden
Start and end date, duration:	<p>Preparatory events: 5 Peer Review Seminars, 8 months (November 2006 to May 2007), including preparation time.</p> <p>Main event: November 2007 (22nd and 23rd of November, 2007)</p> <p>Follow-up: 6 months, from December 2007 to May 2008 (policy briefs: December 2007 to March 2008; final report: March 2008 to May 2008)</p>
Planned expenses and Commission contribution:	<p>Total budget planned: 334 000€</p> <p>Commission contribution: 300 000 € (89.92%)</p>
Direct links with other platforms:	<p>A chain of events has led to the Forum: Five Peer Review Seminars on diversity-combating racism have been implemented and two of them were funded through the European call VP/2006/2007 (the Paris Peer review and the Policy Forum):</p> <ul style="list-style-type: none"> • 8/9 February 2007, Paris (France): Employment intermediaries. • 19/20 March 2007, Hamburg (Germany): Trade Unions. • 22/23 March 2007, Hamburg (Germany): Associations and NGOs. • 26 April 2007, Stockholm (Sweden): human resources management. • 21/22 May 2007, Hanover (Germany): local and territorial actors.
Coordination with other platforms:	<p>2 UKni-led events (exchange event and the related Policy Forum) on ‘Harnessing Diversity in the Workplace through Empowerment’ (Finally called: Diversifying the workplace - strategies for empowerment and inclusion’);</p> <p>4 Sweden-led events (learning seminars on ‘Enhancing Diversity in the Media’).</p>
Number of participants:	About 300 participants were expected in the Policy Forum, with a large presence of non national Europeans (about 50%). Actual attendance was at 268.

² The translation used by the European Commission is ‘Overcoming Discriminatory Practices against Ethnic Minorities in Employment’. The title of the event was finally: ‘Euro-Platform Acting against ethnic discrimination in employment’.

Evaluation questions – a reminder

We have proposed four groups of evaluation questions, which have been validated by the European Commission, to guide our evaluation of each platform, concerning:

- The rationale for the platform, for the choice of the format, for the targeting of specific participant profiles etc.;
- The effectiveness of the platform and the extent to which the objectives of the call have been achieved;
- The way in which the organisation of the platform has favoured or hampered effectiveness;
- The overall contribution of the platform to the capitalisation and exploitation of EQUAL results.

The detailed evaluation questions are provided in Annex 1.

2. Rationale

The rationales to look at, from an evaluation point of view, are both those of the platform organisers and of the Evaluation Committee set up by the European Commission for the selection of the platforms to be supported within the restricted call for proposals VP/2006/007.

2.1 Analysis of the promoter's rationale

Although there were formally two distinct applications for two different platforms, the French Managing Authority sees the Peer Reviews and the Policy Forum as one platform, as an integrated and complex process³, which includes the Peer Review seminars and the Policy Forum, presented in the application form as the 'visibility event' for this process. The process is structured by a working programme and a methodological guiding thread (*fil rouge*) ensured by the European expert. Peer Reviews have been the main steps leading to the Policy Forum, and, as noted in our evaluation report of the Peer Review of February 2007, all Peer Reviews were relatively independent from one another but built on the same model and contributing to the same objectives. The outcomes of these Peer Reviews were gathered in five thematic documents (each including a synthesis of the experience presented and of the lessons and recommendations derived, as well as the list of participants). The Peer Review seminars directly fed into the Forum as each informed a specific 'Interactive Forum'.

The specific rationale for France to set up the Policy Forum was thus to design a visibility event, conceived both as the conclusion to this global process and as the core of the mainstreaming strategy: it was as a space for dialogue and discussion between policy makers and practitioners. The European dimension was genuinely considered important by the proposers, in that it allowed for the confrontation of distinct approaches to combating discrimination (Republican and egalitarian, positive discrimination etc.).

The organisers have conceived of the mainstreaming strategy in a two-fold way: practices and recommendations exchanged between Peer Review participants during the Peer Review seminars constituted 'horizontal mainstreaming' as defined by the French authorities in their application for

³ The rationale for France's engagement in the overall process has already been described in Deliverable 1. Here we only point out the aspects of the rationale specific to the Policy Forum.

the Paris Peer Review; whilst the presentation of these results in the Paris Policy Forum in November constituted ‘vertical mainstreaming’, especially with a view to feeding these results into the ESF 2007-2013 programmes.

2.2 Analysis of the Commission’s rationale and of the relevance of the platform for mainstreaming at the European level

The text of the call indicated that the Commission would take into account a number of criteria aiming at ensuring that *‘the most appropriate Managing Authorities [took on] the most appropriate platforms’* (which were finally not included in the assessment grid of the Commission ⁴).

As we said in our Paris Peer Review seminar report, France was in the case of a country with **some ‘demonstrated interest’** in the issue over time combined with the wish to engage in a more advanced level of activity’. However France had not been in the Steering Group of ETG1, not even a member of the so-called Liaison group. Germany had not either, only Sweden had and **the link with the activities of ETG1 was therefore to be ensured by the European expert**. This also prompted the proposal, in the application, to set up an **‘enlarged Steering Committee’** with the UKgb – especially as the UKgb had been in the Steering Group for ETG1.

The European Commission’s assessment of the application highlighted the innovative character of the platform and its clarity. The added value was seen as lying particularly in the *‘sharing of experiences, mutual learning process’* and in the fact that, through the *‘enlarged Steering Committee’*, Member States would exchange voluntarily their *‘approaches on a common issue’*. Finally, the European Commission considered that the chances of smooth implementation were good given the credibility of the plans put forward: *‘the application is very clear and detailed’, ‘good methods for disseminating the results largely’*.

As shown by our analysis in the Peer Review report, there had so far only been **limited achievements in terms of European mainstreaming in this theme** (combating ethnic discrimination in employment), and therefore the platforms (Peer Review and Policy Forum) coordinated by the French MA could add considerable value. This analysis was shared by the Commission in its assessment of the innovative character of the Policy Forum, when it remarked that *‘fighting racial discrimination is an issue that has not received so far much policy attention’*.

The relevance of this platform for European mainstreaming can also be found in the **links developed with others platforms:**

- Direct complementarities (or synergies) were searched for with the work down by the mainstreaming platform on Media and Diversity. As the pre-announcement paper said, the sixth interactive Forum of the Paris Policy Forum would *‘concentrate on recommendations from the European level mainstreaming platform on Media and Diversity which was launched in 2006 to promote diversity in the media and especially in television. Within the framework of this parallel platform Sweden, supported by Finland and Ireland, has brought EQUAL Development Partnerships together with representatives of the European Broadcasting Union’s Eurovision Intercultural and Diversity Group to exchange their experiences and to build an Ethnic Diversity Toolkit’*.
- The participation of members of the Swedish Managing Authority in the Steering Committee and of the Managing Authority for Northern Ireland in the enlarged

⁴ These criteria were: ‘interest demonstrated in the issue over a period of time, combined with the wish to engage in a more advanced level of activity; Current commitment in joint Commission/Member State working groups, particularly if already experienced as lead Member State; Opportunity for developing synergies with national activities validated as particularly promising within the scope of EQUAL and ESF; Capacity to mobilise competence and experience in the field of the proposed platform; The required budget in relation to the co-financing capabilities of the beneficiary Managing Authority; Co-operation organised with other transnational platforms’.

Steering Committee also laid the bases for adequate cooperation with their respective platforms on diversity.

Added value therefore had to be assessed with respect to the other platforms planned in the field. In our opinion, although this was not highlighted in the Commission's assessment, one key factor of added value was the fact that the organisation of the chain of events was structured around different groups of actors.

In the Commission's assessment, the **potential mainstreaming effects** were seen as credible and linked to the wide range of actors involved into the platform and invited to the Policy Forum; and to the possibilities of mainstreaming within ESF 2007-2013. The fight against discrimination in the workplace and in the labour market is a significant focus in the new regulation of the European Social Fund⁵ and the Commission had asserted, in its framework strategy, the need to build upon the achievements of EQUAL in the new programming period of the European Social Fund. Even though the implementation of ESF programmes has already started, and even in cases where the Operational Programmes do not take combating discrimination much into account, there is still space for building on the best practices presented in the Policy Forum. This was for example the opinion of the representative of the Portuguese Managing Authority we interviewed.

2.3 The format of the platform

According to the text of the call, Policy Fora

'are communication and learning platforms bringing together policy makers and interested parties outside the circle of EQUAL stakeholders at national and EU levels, as well as practitioners able to present to them the benefits of innovative solutions tested under EQUAL, in order to gain their confidence in the feasibility, effectiveness and efficiency of these innovations.

Their main activity is to share the analysis of national practices and policies... by means of seminars, thus providing an opportunity to:

- present special experience or competence in the implementation of a thematic priority...
- allow key stakeholders to address concerns and barriers as regards transfer and integration of the lessons into policy and practice;
- provide a Forum where testimonies of good practice can be given, as well as evidence for the benefits to decision-makers and practitioners from outside EQUAL;
- prepare policy briefs presenting answers to the following questions: What are relevant specific issues or problems addressed in the political arena? Which key factors could make a difference? What is the key good practice tested under EQUAL and how can its benefits or added value be demonstrated (what evidence)? What experience, expertise, tools, guides, training material and quality standards can be shared? What are the policy recommendations, recommended approaches or lessons learnt?

They aim at supporting a debate between (on the one hand) EU level and national policy makers and (on the other hand) practitioners in the thematic fields of EQUAL, concerning issues of importance in these fields.'

It is clear, from this quote that Policy Fora are:

- Targeted to 'policy makers and interested parties' *outside* the circle of EQUAL stakeholders.
- Meant for encounter, communication and '*debate*' between practitioners and policy makers, concerning 'issues of importance in these fields';
- But, going beyond this, they are also meant to prepare for the take up, by policy makers, of innovations developed by EQUAL practitioners: which implies the selection and

⁵ Regulation (EC) No 1081/2006 of the European Parliament and of the Council of 5 July 2006 on the European Social Fund.

presentation of ‘*tested*’ innovative solutions, the identification of ‘*lessons*’, as well as an analysis of the *factors promoting and impeding the transfer/integration of new solutions/lessons* into policy.

We review below how these functions were designed and performed for the Paris event.

a. Targeting

The application distinguished three main categories of participants:

- First, **practitioners who had been involved in the preparatory Peer Review seminars** (i.e. practitioners involved in EQUAL DPs, identified as significant, and whose role was to illustrate specific strategies for combating discrimination, to present effective skills and methods as well as effective mainstreaming approaches⁶);
- Secondly, experts and key individuals associated to these practitioners, who participated also the preparatory events as ‘**critical friends**’
- And thirdly **users**: i.e. stakeholders *outside* EQUAL, such as representatives of national agencies on diversity and combating racism, decision makers and policy makers responsible for public anti-discrimination policies; and peers (with respect to the 5 categories of practitioners) not previously involved in the fight against discrimination.

Comparing the categories of participants involved in the Peer Review seminars and in the Policy Forum, the first two categories were in both events while the ‘user’ category was not represented in the Peer Reviews, although some ‘critical friends’ such as the *Agence nationale pour la cohésion sociale et l’égalité des chances* (ACSE) in France, could also be considered as users.

The numbers of practitioners, experts and users were not determined in the application. The only specification concerned the proportion of non national (50%).

In practice, the list of participants to the Policy Forum was relatively easy to set up since, as planned, it was largely made up of people who had participated in the 5 Peer Review seminars. All Peer Review practitioners and critical friends were invited to the Policy Forum. Participants in all Peer Reviews had been informed of the Paris Policy Forum of November.

This made it possible for members of the Steering Group to dedicate more time to select the stakeholders to be invited to the Policy Forum, as the co-organisers wanted to reach the ‘right persons’⁷. A distinction was made between ‘key actors’, involved in ‘Interactive Forums’ and ‘great witnesses’, involved in the closing session. For the Interactive Forums, the choice was made to identify people in an intermediate category such as higher technicians (civil servants) in administrations, i.e. of not too high a rank but still in a capacity to act and decide within their own organisations. For the ‘big witnesses’, the aim was to bring in policy makers of slightly higher rank.

In this regard, the French Managing Authority and the French NSS pointed out the quality of the German delegation, whose profile corresponded exactly to what had been agreed. It is interesting to note that some companies participated in the conference, whereas this category of actors is usually difficult to attract to that sort of events.

As said by a representative of the French NSS: ‘*in that kind of events, it is preferable not to invite only ‘institutional people’, otherwise the risk is to have an institutional debate only*’. In practice, the speakers were of a good level, and the debates were very concrete. The effort made in the selection of participants was very relevant and worthwhile. The method developed, also, contributed certainly to the concrete character of the debates, since speakers were asked to explain how they could use the recommendations.

⁶ These practitioners correspond to the 5 categories represented in the Peer Review seminars: employment intermediaries, NGOs, trade unions, enterprises (employers, human resources management) and local and territorial actors.

⁷ Thus also paying attention to one of our recommendations in the Peer review report.

The expectation⁸ was that about 300 participants would take part in the Policy Forum, with a share of non nationals of about 50%. The transnational character of the event was going to be ensured not only through the share of non-French participants but also through the diversity of experiences presented: in the words of a participant, *'as the event intends to generalise good practices gained through EQUAL and to involve key decision makers and social and economic actors from outside EQUAL, it has a genuine mainstreaming dimension'*.

In practice, less than 300 people took part: 268 persons were present at the Policy Forum. The gap with the objective is mainly due to the fear of the transportation strike that was just starting at the time in Paris. However, the proportion of non nationals reached more than 45% in spite of the strike movement, which is quite an achievement under these circumstances, and a considerable improvement over the Paris Peer Review seminar.

In all, 21 Member States were represented. However, the breakdown of participants by country shows the prevalence of the three Steering Group countries. The participation of representatives from the co-organising Member States, i.e. Germany and Sweden, amounted to 20% of participants (37 for Germany and 18 for Sweden⁹). Together with France, representation of Steering Group countries amounted to 75% of participants. The next country in terms of size of delegation has been the UKgb (12 participants, 4.5% of the total). New Member States only made up for 6% of the participants, from 6 different Member States (included Romania). There were only very few representatives of Ireland and Northern Ireland (2 participants). Indeed it is as if there had been an implicit distribution of Member States between the Belfast and the Paris Policy Fora, as the presence of new Member States was much more prevalent in Belfast. There were 9 representatives of the 'European level'.

The participants list shows a great diversity of actors, corresponding to the planned categories (intermediaries, trade unions, NGOs, local actors).

Taking up the above typology of actors, the largest category was that of stakeholders and policy makers (about 100 participants) coming from Managing Authorities, ministries, national agencies and local authorities, as well as from the European commission; followed by representatives of NGOs and observers included as critical friends (less than 80); DPs as practitioners (60); support staff (30, including moderators and experts) and journalists (10).

Although the distinction between users and other types of participants has generally been clearer in the Policy Forum than in the Peer Review seminar, the confusion was not completely dispelled with regard to French participants. The role of authorities such as the *Haute Autorité de Lutte contre les Discriminations et pour l'Égalité* (Halde) or the *Direction de la Population et des Migrations* (DPM) has not always been clear: *'the final event will be the occasion of a concrete collaboration with the key actors, identified as future users of the platform (Halde, for instance, in France), so as to implement a better articulation between these actors' expectations and the results of the platform*¹⁰. But as our evaluation of the Peer Review Seminar had shown, some 'users', such as the DPM, considered themselves as 'practitioners' or 'peers'. During the Policy Forum, some of the representatives of the Halde were invited as 'great witnesses' while, before, they had participated in some Peer Review seminars as 'critical friends'.

This confusion perhaps came from the will to associate some major policy actors not previously engaged in EQUAL (such as the Halde) from the beginning of the process (in the Peer Reviews seminars), a worthwhile approach provided the actors concerned did not only see themselves as co-organisers but also as bearing a responsibility for taking up the platform lessons and recommendations.

⁸ As said not at application stage.

⁹ The most severe impact of the strike consisted in the lower than planned representation of Sweden in the Forum.

¹⁰ Source: Application.

b. Methodology for debating and transferring to policy

The work method by and large addressed the call requirements. It included:

- **5 Interactive Forums** of discussion between practitioners and policy makers, on all the issues covered by the 5 peers review seminars (NGO, trade unions...) and the media platform: in these workshops, two or three practitioners were in charge of illustrating the main recommendations and lessons. A discussion with key actors or witnesses followed these synthetic presentations, so as to decide on the possibility to generalize approaches, and a general debate with the participants of the Interactive Forums ensued. Key actors were also questioned on their ability to implement the recommendations. This was very suited to the call aim of promoting ‘*confidence in the feasibility, effectiveness and efficiency of these innovations.*’

The approach by type of actors, the same as for the Peer Review seminars, was very relevant. The range of key actors appointed was very large and addressed different levels of decision and policy-making (European, national and regional).

- **Plenary sessions** (opening and closing sessions), with a round table with ‘great witnesses’ in the closing session.

The conclusions from the Interactive Forums were reported back to all the participants of the conference and more particularly to the panel of six ‘great witnesses’ in the closing session.

The panel was intended to involve high level representatives from public authorities of France, Germany, Sweden and from the EU level. This objective was largely achieved. All of the witnesses were decision and policy makers, but from different types of organisations and levels of policy making: local authority (an advisor to the Mayor of Paris), employer (Sweden), the ESF Director at the European Commission, the National Agency for Employment (ANPE, France) and a national authority (the delegate for migration of the German federal government). It is important to note that the panel representatives were selected so as to obtain one representative from each of the Interactive Forums. In practice, the ‘key witness’ foreseen to represent the ‘social partners’ forum could not come to the conference and was replaced by a representative of the *Mairie de Paris*.

- An **exhibition of EQUAL DPs** which indeed constituted a ‘Forum where testimonies of good practices can be given’. Taking the Interactive Forums and the exhibition together, about 60 DPs were presented during the conference.

In addition, the documentation produced ahead of the Policy Forum, such as the **intermediary reports**, providing a synthesis and recommendations from the Peer Review seminars, addressed many of the questions raised in the call requirements (see above, questions to be addressed by policy briefs). The conference pack given to each participant of the Policy Forum was very comprehensive, in particular with regard to the DPs involved in the platform (*‘Palette of projects’*, *‘Portraits of experience’*).

However the ‘analysis of national practices and policies’ was not the main objective of the Policy Forum but rather constituted prior work for the Peer Reviews. On this basis, the Peer Reviews were supposed to put forward recommendations which were to be tested during the Policy Forum. In practice, although the Peer Review seminars pointed out some important issues, comprehensive recommendations were more difficult to identify and were not always well phrased. This meant that important **in-depth follow-up work** had to be carried out between the Peer reviews and the Policy Forum in order to reformulate the recommendations issued from the Peer Reviews and make them

more operational. The Steering Committee took charge of this additional work, and more particularly some of its members (European expert, French MA and NSS).

Finally, one objective of the Policy Forum was to be a **visibility event**: there were many references to this dimension of communication and of visibility in the application and in the annexes - actions in the media were foreseen '*so as to make a wide diffusion of the results*', there was to be diffusion of a large and attractive documentation etc. In practice, two journalists were in charge of re-writing some documents, in particular the '*Portraits of experience*' which were presented under a magazine format and distributed not only to the participants but also to the press agencies. A public relation consultant was dedicated to 'sell' the event to the press.

3. Effectiveness

3.1 Achieving the objectives of the call

Here the purpose is to assess the extent to which the platform under review has contributed to the specific objectives of the call:

- **‘Sharing** relevant issues, agenda and actions, as well as results, on projects, pilots and new approaches;
- **Validating** and assessing results and achievements, on the basis of common criteria, through (peer) reviews and benchmarks, in order to identify success factors and ways of overcoming barriers to change;
- **Mutual learning** by programme managers and practitioners from within and outside EQUAL (...) concerning the implementation of the leading principles of EQUAL;
- **Networking** for sharing knowledge with a wider professional community, and for collaborative work on issues of common interest;
- **Transferring good practice** and lessons learnt on new ways of policy delivery, by matching the supply of innovative good practices from advocates of good practice in EQUAL with the demand of potential users and decision makers, administrators and stakeholders.’

The objectives of **sharing** and exchanging practices and **learning** from foreign experiences have been reached, but less at the event of the Policy Forum than during the Peer Reviews seminars. The method of work for the policy forum prioritised the sharing of lessons identified before the event with stakeholders called ‘key actors’ and less with the other participants invited to the event. The Forums were dedicated, on the one hand, to practitioners, and, on the other hand, to the key actors. This is very different from the Policy Fora of Hanover or Malmö, where workshop participants were invited to take part in the debates after the presentation of projects. In Paris, the room for debate with participants was objectively very limited, as each of the Interactive Forums had around 50 participants.

As a result, interviewed participants disappointed, as far as exchange and sharing was concerned, although their reasons were quite disparate: some of the interviewed participants deplored the short time allocated to exchange. A few others found that the event only led to a presentation of what had worked, and of positive testimonies. For others, the exchange dimension was real, but too much confined to the Interactive Forums. For yet others (few), the only place where there was effective exchange and discussion was the exhibition and outside the sessions. For their part, stakeholders, who had not been involved in the Peer Review seminars, would have preferred smaller groups.

What we observed in the Interactive Forums sessions was that there was a lack of time to ask questions to the speakers and discussions were limited due to lack of time.

Some of participants, in particular from the **new Member States**, were quite disappointed by the fact that the focus of project presentations was much more to illustrate recommendations than on the presentation of ‘good practice’. In our opinion, this disappointment stems from a misapprehension of what a Policy Forum (and especially this one) is about: the aim is to finally transfer lessons and recommendations to the policy and decision making spheres, rather than coming back yet again to the description of practices during EQUAL. This type of comments may point to a problem in the invitation strategy in the new Member States (in terms of profiles of participants and/or in terms of what was explained to them ahead of the Policy Forum).

Finally, many of our interviewed participants distributed the documentation after the conference, thus contributing, at a later stage, to the objectives of sharing and learning.

In terms of **networking**, the results seem to have been very positive, at least for some participants. Thus a DP representative told us that *‘the main outcome from the event has been the tremendous networking opportunities that it has brought to my organisation. As a result of the event, I have submitted 3 EU proposals with partners I met at the event’* – it is likely that not all participants were as enterprising, but it can be noted that the Policy Forum took place at a moment when transnational projects were being set up in the new ESF programmes. Indeed, the programme of the Forum was designed so as to leave time for networking. However a major obstacle to networking was that the participants list delivered with the conference pack did not include any telephone or email address. The French law *‘Informatique et Liberté’* is the main argument invoked by the French NSS to account for this¹¹. As this is a severe limitation for events precisely meant to foster transnational and national contacts, some solutions need to be worked out for the future, complying with the law – and with similar laws in other countries – and yet allowing those participants who wish to do so to make their contact details publicly available.

In terms of **mutual learning**, results are also very positive at different levels:

- **First, between co-organisers of the platform:** the process (Peer review seminars and Policy Forum) fostered mutual understanding of the national approaches and policies between the co-organisers of the platform (France, Germany and Sweden). While at the beginning of the process, they were focused on their differences, which they accounted for on the grounds of different cultural traditions, they changed their mind from one Peer review seminar to the other, and now rather talk about ‘complementary approaches’ than differences. Furthermore, although the suggestion, by the European Commission, at the beginning of the process, to include the UKgb in the enlarged Steering Committee seemed to raise some difficulties, these were overcome over time, and collaboration turned out to be very positive: the French Managing Authority now considers that the UKgb has had 20 years of practice on the subject and that France has a lot to learn, especially with regard to positive action.
- **Second, between participants:** interviewed participants found the explanations about the national differences in the approaches to discrimination and how to combat it quite illuminating: *‘I was very interested by the idea of cultural mediators’*; *‘I was particularly impressed by the deputy of Paris who had the strongest commitment to human rights and protection and by the work of Kumulus in Germany’*. Furthermore, some of the participants became more aware of the strengths and the weaknesses of their own system and identified better where progress was needed.

Most interviewees were very appreciative of the quality of speakers and presentations.

There has been **no formal validation and assessment process** of the EQUAL results during the Policy Forum. On the other hand, as said above, the objective of the platform was not so much to validate good practice as to **validate policy recommendations** issued from EQUAL practices and with a good generalisation potential¹².

Although recommendations were in most of cases validated by ‘big witnesses’, ‘there were quite varied views, amongst participants, as to whether the recommendations discussed in the Policy Forum had indeed been validated or not.

¹¹ Indeed we had to look up contact details for our interviewees on the internet... which shows that people have their contact details available on the web anyway!

¹² As pointed out in our report on the Paris Peer Review, although the validation of good practice had been the role of the Peer Review seminars, there had been no formal validation and assessment process of the EQUAL results there either, even though the time dedicated to the synthesis of results, once DP presentations had been made, could be considered a form of informal assessment and validation of the EQUAL results, without any pre-established criteria.

One interviewed user considered that the policy recommendations had been legitimated, mainly because they were based on project practices. However, another participant considered that *'specific best practices in all their variations are often much more interesting than general policy recommendations'*. A further interviewee, a policy maker, who had not followed the prior process, the conference did not entirely capture key issues for policy change, which, by comparison, was *'a feature of the Policy Forum of Malmö'*.

One interviewed practitioner stressed that *'the conference did not create any solid results. It should have presented a vision of what the EU or the EC will do in terms of discrimination and employment'*. However, in Hanover the closing session had addressed the EU vision, but this had generated, from our point of view, a very institutional debate which participants had found frustrating.

All these different opinions are indicative of different expectations, but also of different ways of learning (some prefer to be confronted directly to project practices, others see it as positive that some abstraction from practices has taken place even though lessons are grounded in these practices etc.). It is simply impossible to cater for these cognitive differences and it is also very hard to satisfy every different type of policy makers (Managing Authorities, national/regional/local/territorial authorities).

Results are also mixed with regard to **transfer**.

There were indications that some policy transfer will occur as a result of the Policy Forum. For example, according to a representative of a new Member State, the intention is to use the *'best from the Paris meeting into the work of the Roma network between 2007 and 2013'*. The Portuguese Managing Authority representative was also keen to largely mainstream the best practices issued from the platform and to organise an event in Lisbon, linked to the last meeting of the platform (see below).

On the other hand, the representative of the Managing Authority for a new Member State suggested that a more active role of the national delegations taking part in the event could be fostered by, for example, asking them to produce a mission statement ahead of the conference, putting forward issues of interest, and to produce a 'post-statement', like an assessment, with points of action which they need to monitor. This suggestion might be an indication that, for the respondent, transfer was unlikely because it was difficult to relate to the issues addressed in the conference.

In the same vein, it would have been useful to obtain a sort of policy compromise about some of the recommendations presented during the Policy Forum. The representative of the Portuguese Managing Authority made a very interesting proposal at the end of the Policy Forum and encouraged Member States to implement at least 2 recommendations so as to manifest their commitment to reducing discrimination. There does not seem to have been any follow-up on this, except for the very Managing Authority which had made the proposal.

However, the take up of policy recommendations needs time, and this will need to be re-assessed in the medium term.

Some stakeholders suggested making a video, arguing that the main lack in this type of conferences is in terms of dissemination after the conference. Printed documentation is less effective than images that could be downloaded from Internet. According to our last interview with the French Managing authority, a DVD is foreseen. Overall, however, the organisers' effort to mobilise the press and make the Forum a real communication event is commendable, and all too rare. Some articles and reports appeared, in particular, in *Le Monde* and on Euronews. According to a representative of the French NSS, this was the first time that journalists were interested in EQUAL (at least in France).

3.2 Potential and emerging impacts

There are a number of concrete impacts, for the continuation of the process launched with the chain of platforms:

- The Portuguese Managing Authority has become involved in the platform whereas it had not been a member of the Steering Group, nor of the enlarged one. As a matter of fact, the final meeting of the enlarged Steering Committee will take place in Lisbon, and this meeting seems to have been organised as an event in itself: it will be opened by the 'High commissioner on discrimination' and key actors of Portugal will be able to take part. There will be a project visit to a DP ('barrios criticos').
- In their closing comments, the French and the German Managing Authorities stressed their intention to continue. Furthermore, the German Managing authority proposed a new meeting in Germany in May. The German MA will probably take the lead of the future platform, and will invite all other Managing Authorities to participate in this new platform.

As said by the French Managing Authority representative, *'follow up is now taken charge of 'outside' (i.e. by Portugal and Germany) and this is the best result we could hope for'*.

Some other members of the platform, such as the UKni, wanted to continue with the platform as well.

- At the beginning of December 2007, after the Policy Forum, the French Managing Authority made a presentation of the main recommendations issued at the Heads of Mission meeting, in Brussels.
- The theme of the Policy Forum has been integrated as one of the thematic evaluation lines which will be implemented at EU level in the new ESF programming period upon initiative of Managing Authorities: a group, including France, Spain and the UKgb amongst others, is actually working on it, within the frame of the ESF Evaluation Partnership coordinated by the Evaluation Unit of DG Employment.

This success in drawing more countries in concrete thematic work on these issues is probably in part due to the operational character of the recommendations: in the view of the European expert, the approach by type of actors (intermediaries, enterprises, trade unions...) proved an excellent idea which largely accounts for the fact that such concrete results could be obtained. Nevertheless, he also thought that the platform could even have gone further in terms of results, but time was lacking, after the Peer Review seminars and before the Policy Forum, to work out the recommendations even better.

For France, the work done in the platform has had an important impact:

- First, lessons can be drawn for the implementation of recommendations and the elaboration of policies in this field : as said by the French coordinator of the platform, *'I have become really convinced that what is needed is to work at a local level'*.
- Secondly, a large share of the French ESF programme for 2007-2013 is dedicated to this field: the idea is now to implement a more transversal approach to fighting discrimination, across the programmes. This is very clearly the approach taken by the Managing Authority.
- However, these issues may still not be easy to address politically in France. Thus no minister came to the conference, although invitations were issued to four of them. This has to be compared with the Agora organised in 2006, in Paris, on the question of age management, which was closed by the Minister of employment and social affairs. However, beyond the difficulties with the theme, one might have thought that the

government would see the conference as a good preparation for the future Presidency of the European Union.

- The French Managing Authority also tried to mobilise the French Regions to participate as policy makers, since they are responsible for the implementation of training policies for young people and jobseekers. Only a few attended the conference. Again, this is indicative of a low investment for that question, for the moment, at the regional level in France, by contrast with the commitment at the local level (towns). Indeed, contrary to cities, towns and their 'banlieues', Regional Authorities do not have to face as directly the problems rooted in discrimination. It is to be hoped that the new generation of ESF programmes, in particular the operational programme for 'competitiveness and employment', dedicated in part to the fight against discrimination, will contribute to change the current position of the Regions.

Overall, it can be said that the main objectives of the platform, to give visibility to the theme, to tighten the links between policy makers and the projects and to make policy makers aware of the EQUAL results and their relevance for public policies, have been achieved. To finish this section on a reflexive note, it might be useful to think about the European expert's assessment that Member States do not lack ideas for fighting against discrimination, but that what is faulty is implementation.

4. Organisation

4.1 Coordination

In introduction to this section, it is important to have in mind that the coordination of the Policy Forum did not change very much as compared with the coordination implemented for the Paris Peer Review seminar as the two events are complementary. The following description is thus for a large part issued from the Peer Review report.

There are two main instances of transnational co-ordination, a Steering Committee and an enlarged Steering Committee.

The **Steering Committee**, which acts as such both for the Peer Reviews and for the Policy Forum, gathers representatives of the lead Member State (France) and of the two voluntary ‘co-organiser’ Member States (Sweden and Germany). The French Managing Authority had committed France to work more particularly on this theme and this had been officially announced in a meeting of the Managing Authorities in Brussels. Two MS volunteered to work with France on that question, Germany and Sweden, which explains why they became involved as co-organisers of the platform and also organised their own events on the same model.

According to the specifications, the **Steering Committee shares responsibilities** between its different members,

- The logistics and secretariat of the events was, logically, the responsibility of the host Member State: France took on this responsibility first with the organisation of the first Peer Review seminar in Paris, followed by Germany for 2 Peer Reviews and Sweden for one. Germany assumed again this responsibility once before it was devolved to France for the organisation of the Policy Forum.
- The three Managing Authorities were co-responsible for the contents of the seminars.

As far as we can judge from our observation of the Policy Forum and from our interviews, there has been no deviation from these specifications. In practice, after each Peer Review seminar, each Member State host produced its synthesis, thereby assuming their role for the secretariat until the end.

In practice as well, a **task force** of the Steering Committee met and discussed each of the projects gathered ahead of each Peer Review (the composition of the task force has been the same for all Peer Reviews. The three MAs and the French NSS were represented. The European expert was also a member). DP selection was allocated more time after the Paris Peer Review, so as to be more specific and precise in the choice of projects. This task force identified all the practitioners that were involved in the 5 Peer Reviews, and all of them were invited to participate in the Policy Forum. However, the task force decided which ‘practitioners’ would be invited to the Interactive Forums to provide a ‘testimony’ to support the recommendations. The task force also decided on the moderators to mobilise for each of the Interactive Forums.

Steering Committee meetings were supposed to take place every two months. In practice, 5 meetings were organised in 2006, and 5 in 2007, not including the task force meetings for the selection of DPs which were organised between each Peer Review over a period of 5 months (from January to May 2007). Thus, all in all, the numbers of meetings were finally up to the planned ones. Some meetings were cancelled between October and November 2007 due to the transportation strike movement and most of them were replaced by conference calls.

The idea of inviting other stakeholders to participate in an **enlarged Steering Committee** had been put forward in the application: in particular it was to seek the participation of EC representatives with a view to establish links with the European Year of Equal Opportunities for All as well as with the Unit on Fundamental Rights of DG JLS. Other Member States interested in the platform could also be invited – it was thought in particular that it would be relevant to associate the UKgb and a new Member State. In practice, in addition to the European Commission, the UKgb and Northern Ireland joined.

It had been thought that an enlarged Steering Committee would help mobilise participants in the 5 Peer Reviews and the Policy Forum, as the work requested from Managing Authorities was quite important: for the Peer Reviews, their role was mainly to identify DPs, and for the Policy Forum, their role was to identify the right ‘policy makers, decision makers’ to invite.

In practice, this was not easy to implement and the work mainly fell on the shoulders of the co-organisers and was ridden with difficulties: first of all, the period – the year 2007 – was not the best as a lot of events, including other platforms, were planned and Managing Authorities were regularly asked to identify DP practitioners, and the ‘right’ ‘policy makers, decision makers, potential users’. In the case of the platform evaluated here, the same was asked 6 times. This may explain why some countries sent very small delegations.

However, the members of the enlarged Steering Committee were active in inviting participants falling so to speak under their natural responsibility (European-level participants for the representative of the European Commission, UKgb delegates for the UKgb representative). Some members of the enlarged Steering Committee took on other roles as well. Thus the representative of the national support structure for Northern Ireland acted as moderator of one Interactive Forum¹³.

We also have to point out the role of Racine, the French NSS, in terms of follow up and coordination with all the speakers, nearly 60 people (around 10 in each Interactive Forum plus 10 for the plenary session): making sure they could come to the conference, explaining what was expected from them: for example, it was important that practitioners understood that their presentation could not be ‘a simple summary of the project but an illustration of a recommendation’.

In addition, the **national Steering Group** which had been set up for the Peer Review seminar so as to involve potential policy users (DPM, HALDE, ACSE) in the preparation was again mobilised for the preparation of the Policy Forum, mainly to identify the right persons to invite.

4.2 The role of experts

In the application for the Policy Forum, as for the Peer Review, the French Managing Authority asked to benefit from the collaboration of the thematic expert appointed by the European Commission for the entire duration of the EQUAL initiative to provide support for the European mainstreaming of EQUAL results. The expert requested was from IFAPLAN, which has been in charge of European thematic activities for themes 1A and 1B (employability).

The role of the **European Expert** in the Peer Reviews was to support MS organisers, to ensure the European dimension and, in particular, to provide a European guiding thread. Thus, in addition to taking an active part in the steering of the platforms (as shown for example by his participation in all Steering Committee meetings and in the selection task force), he drafted a European Context note, which was presented in all five seminars. He also drew the conclusions at each of them. He was in charge of facilitating three of these seminars: those with the social partners, with associations and with employers. He participated in all of them.

¹³ The representative of the Managing Authority for Portugal, who was not officially member of the enlarged Steering Committee, also took on an animation role.

In the period between the Peer Reviews and the Policy Forum, he was in charge of elaborating the template to be followed by the Managing Authorities in their drafting of the recommendations issued in the seminars. As the result was somewhat disappointing, the European expert had to redraft them together with the French Managing Authority and the French NSS, in October. The time dedicated to this task was quite important, and more important than planned.

For the Policy Forum itself, the expert played a role in the preparation, as a member of the task force. During the Policy Forum, his main job was to draw up and present the final conclusions at the end of the conference. He therefore participated in one Interactive Forum and in the meeting of Interactive Forum 'rapporteurs'.

It can be said that the European expert has played a major role for the implementation of the platform as a whole, and his added value has been very important at different stages. This contributed probably to a considerable extent to the results obtained in terms of contents but also in terms of involvement of new members and to the will of existing members to continue.

Contrary to the application for the Peer Review, the application for the Policy Forum did not mention any other facilitation or expert roles. But, in practice, **three kinds of moderators were involved into the organisation:**

- **One moderator for the debate during the plenary session:** a high qualified journalist, responsible for European affairs at the Radio France Group. It is interesting to note that he did the job freely. He considered this as part of his public service role.
- **Six moderators for the Interactive Forums (one each).** The choice of these was made by members of the Steering Committee (and/or task force) following 2 criteria: first, that they should know the theme and the group of actors addressed in the Interactive Forum concerned¹⁴ and second, animation skills. The choice was also made so as to have moderators from a variety of Member States. As was the case for the practitioners, the French NSS prepared some guidelines for Interactive Forum moderators.
- **Six 'rapporteurs'** in charge of the synthesis of the debates in the Interactive Forums and of briefing the European expert for him to draw the conclusions of the conference.

Even though a particular effort was made for the preparation of presenters and facilitators in this Policy Forum, there was still a lack of time for exchange, which shows that more attention needs to be paid to timing issue in the preparatory guidelines to moderators.

4.3 Practical arrangements

Languages

Three **working languages** - English, French and German - were available through simultaneous translation in the plenary sessions and in the Interactive Forums, although English was the main working language.

All the documentation circulated ahead of the conference as well as the documentation distributed at the beginning was available both in French and English.

This was very much appreciated by interviewed participants.

¹⁴ The Interactive Forums were set up each for a different type of actors, as had been the case for the Peer Review seminars.

Documentary resources

Documentation was supposed to be (and was, in the case of the Policy Forum) provided to participants in advance. It consisted of a graphically homogenous set of documents, and available online, as said, both in French and in English:

- A briefing document ('Context Notes') on the general problematic (setting the context of racial discrimination on the labour market);
- The programme of the event (very detailed and operational) and a list of participants.
- Syntheses
 - A synthesis of the 5 Peer Reviews seminars (including recommendations)
 - A synthesis of the results of the working group dealing with Media and Diversity
 - A global synthesis of the recommendations.
- Data on the DPs presented in the Peer Review seminars (the 'Palette of Projects'), as well as briefs on 11 initiatives led in various countries ('Portraits of experience').

At the beginning of the Policy Forum, each participant was given all this documentation both in paper form, and in a USB key.

The documentation has generally been praised by participants during the seminar and afterwards in our interviews. Interviewed participants said they had chosen to read some of this documentation once the seminar had already taken place. Some of them disseminated the documents and shared them with their colleagues. Some of them have also relied on this documentation as a basis to write a report after the seminar.

The quality of the documents (including from an aesthetic point of view) was noted by a majority of participants.

The final report of the conference is available on EQUAL website, which is significant of the effort made by the co-organisers to publish the results as soon as possible.

Subcontracting

The French national support structure was supported, as far as the logistical aspects of the conference were concerned, by an event communication agency, which worked more particularly on the management of registrations as well as on the graphic aspects of the documentation.

Also, as the French Managing Authority was keen to communicate about the event outside of France as well, the event agency recruited two journalists (one Italian, one German) for the re-writing of documents.

Organisation of the follow-up

A final meeting of the enlarged Steering Committee will take place in March 2008 in Lisbon. This will be the first time that the Portuguese Managing Authority participates, showing their recent but determined involvement in the platform.

Furthermore, during the closing session of the Policy Forum, the German Managing Authority indicated that they were open to the idea of hosting a meeting to consider practical options for continuing and enlarging co-operation in this field: a meeting is planned for May.

It can also be noted that a film is being prepared as well as the full minutes ('*Actes*') of the Policy Forum.

Financial aspects

According to our last discussion with the coordinator of the platform, the total costs approximately matched the budget estimated in November 2006 but with probably some changes in the breakdown of expenditure. On the one hand, the German Managing Authority chose to invite the entire German delegation on its national budget, which reduced the travel and accommodation costs. On the other hand, the documentation produced for the Policy Forum was very abundant and the cost was much higher than planned.

In this context, the French Managing Authority was hoping to be able to benefit from possibilities of transfers from one budget item to the other.

The final balance was about to be known when we finished this report.

5. Conclusions and recommendations

Conclusions and recommendations on the format of the Policy Forum

The coupling of Peer review seminars with a Policy Forum has been quite effective:

- Peer Review seminars were **preparatory events** while the Policy Forum was the **visibility event**, meant to communicate the results issued from the preparatory events: the complementary of the two kinds of events is clear;
- Both types of events contributed together to go further in the process of **vertical mainstreaming** and to put stakeholders in a position to react to recommendations;
- The work was largely supported by the coordinator of the platform (France) but support from the European Commission, in particular through its thematic expert, throughout the process, has also been crucial and vindicates the need for **European-level support** and facilitation.

The format of the Policy Forum implemented in Paris has closely followed the specifications of the call. First, a particular effort was made for the identification of policy makers, and different levels and kinds of policy makers were distinguished. The approach by type of actors on the labour market was very relevant as it allowed for a clear continuity with the Peer Review seminars, and for the selection of those of the practitioners involved in the Peer Reviews who were best placed to illustrate the recommendations. The Forum was organised mainly as a space for debate between practitioners and policy makers, called ‘key actors’ in the Interactive Forums and ‘great witnesses’ in the closing session.

Although the French Managing Authority considered that the **transnational dimension** of the event had been satisfactory, non nationals represented only 45% of participants. The fact that participants from France represented 55% of the audience was understandable but has sometimes been a drawback in the workshop discussions. Most French participants were involved as ‘key actors’, and played a specific role during the conference. Some national delegations were very small and not conducive therefore to adequate representation or to the possibility of meaningful further work and networking back home (this was the case e.g. for Austria, Denmark, The Netherlands, Romania and the Slovak Republic).

In our view, it would be good, in the future, to have perhaps less countries represented but with larger, and more diversified, delegations.

Conclusions and recommendations on the achievement of the call objectives and on preliminary impacts

Overall, the objectives of the call for **sharing** and exchanging practices and **learning** from experiences have been reached, but more so in the 5 Peer Review seminars than at the Policy Forum, where the debate was mostly organised between selected practitioners and policy makers, which gave less room to other participants. Furthermore, there has been substantial mutual learning between the three co-organising Member States (France, Germany and Sweden), which led them to be less focused on their differences and more on their complementary approaches and synergies.

This also shows the relevance of entrusting the organisation of European events to **real teams of Member States**, in which the learning takes place in the process of setting up the events as well as in the events themselves. But it is also due to the fact that the actors involved in the Steering Group jointly designed the series of events and thus exchanged on the **contents** of the platform and not only on organisational aspects as is often the case.

Networking has taken place not only during the Policy Forum but previously in the different preparatory events and will probably continue.

More than 40% of participants can be considered to have had a policy/influencer capacity beyond EQUAL (even if they had been involved in EQUAL). The Forum has thus been a **mainstreaming event** in the sense that it has provided a space for the encounter between practitioners and ‘policy makers’, and **this encounter has created momentum**, although longer term impacts will need to be assessed.

Most of the recommendations issued from the work of the 5 Peer Reviews plus the platform on media were validated.

Finally, some **transfer of good practice and lessons** has already taken place, for instance, as evidenced for example in the recent involvement of Portugal. In France, receptivity could be improved amongst higher rank politicians, but, at an operational level, the results are already there as much more importance has been given to the theme in the implementation of the new generation of ESF programmes and the Policy Forum recommendations are due to inform all programmes in a transversal way.

Even though the Policy Forum was meant as a final event, the platform to combat racial discrimination in employment is likely to continue and involve more Member States. Indeed it would be useful to monitor the mainstreaming of EQUAL recommendations, the place given to combat racial discrimination at work in policies, the changes in legislation and the positive actions engaged in the operational programmes of the new generation of ESF programmes.

Conclusions and recommendations on the organisation

The organisation of the chain of 5 Peer Reviews and of the final event, the Policy Forum, has been quite effective in securing real transnational collaboration between the three Member States organising the reviews; in providing a continuity of methods (through common specifications and the continued support of the European expert) as well as a capacity for learning from insufficiencies; in capitalising results from one review to the next, through the presence of the French Managing Authority in all events and through the work of the European expert.

The involvement of other Members States has been possible throughout the process thanks to the setting up of an enlarged Steering Committee. This kind of organisation is very flexible and made it possible for example to involve the UKgb. All the Member States involved in the platform had an active role during the Policy Forum (in terms of organisation and/or moderation).

The role of the **European thematic expert** has been crucial for both kinds of events, especially as he ensured that proper account was taken of prior work. He has provided crucial support to the co-organisers at every level: in the organisation and moderation of the Peer Review seminars and in the work done on the recommendations ahead of the Policy Forum, as well as during the conference itself. The style and level of the documents prepared were also adequate. The secondment of the expert by the European Commission has proved a very clear and effective way of proceeding.

The time schedule of the event, its dynamics, the respective roles of plenaries and Interactive Forums, the choice and role of facilitators and rapporteurs were, in the main, very effective. Perhaps the concern with timing could have been somewhat less strict so as to allow for more debate amongst participants in the Interactive Forums.

The attention dedicated to the media and the work done by the platform to integrate communication aspects have been particularly welcome. As a result, journalists contributed to give visibility to the event, which will certainly have an effect on the mainstreaming of EQUAL results. This communication dimension needs to be taken more into account in call requirements if there is a new call for platforms.

Annex 1 – Evaluation questions

- *Rationale:*
 - *Inscription in a wider mainstreaming process:* In what ways does the platform take forward previous European mainstreaming activities in the theme or on the principle addressed, both in terms of expected outcomes and organisation? What is the specific contribution of this platform within this stream of events?
 - *For platforms included in a 'platform chain':* What has been the logic of planning different types of events on a given theme, in other words, what specific contribution has been planned for each event and how has progression been thought out?
 - *Choice of format:* In what ways does the specific format chosen for the platform (e.g. Policy Forum, exchange event etc.) serve the objectives pursued?
 - *Participants:* What strategy has been adopted with regard to participation – what profile has been defined for participants (e.g. type of balance between actors involved in the EQUAL programme and external actors, targeting decision makers with direct responsibility in the field or rather multipliers, balance of countries etc.)? What was the final composition of the audience and how can divergences be explained?
- *Effectiveness and achievement of call objectives:*
 - To what extent were the issues addressed in the platform relevant to participants' concerns within the current policy/practitioner context?
 - To what extent were the EQUAL results and outputs discussed in the platform based on validated evidence and to what extent and how did the platform lead to further validation and assessment of EQUAL results?
 - To what extent has networking taken place, according to what patterns, and what is its likely sustainability?
 - To what extent has new learning taken place, who has learnt, what, from whom? and
 - To what extent are the lessons learnt being taken up to inform or directly contribute to new policy/practice developments?
 - For platforms included in 'platform chains': To what extent and how have the outcomes of earlier platforms effectively been taken up and capitalised to inform the organisation of later platforms? What have been the benefits (in terms of understanding, identification and take up of good practice, and networking) of participation in more than one event?
- *Organisation:* To what extent, and how, have the following organisational dimensions favoured or hampered the achievement of objectives?
 - Organisation of the coordinating team – collaboration between Member States, with the Commission, reliance on experts;
 - For platform chains: What co-ordination has taken place between the teams organising each of these events (especially when they are located in different countries)? Have common resources (expertise, documents) been mobilised? Is there an overlapping participant list? How has the capitalisation of earlier events been organised to inform later events?
 - Outreach strategies: definition of participant profile, mechanisms set up for identifying and attracting suitable participants – role of Managing Authorities in this;
 - Mobilisation of resources and distribution;
 - Methodology of work, quality of support documents and follow-up;
 - Logistics.
- *Overarching contribution:* What is the specific contribution of the platform to the capitalisation and exploitation of EQUAL results?