European Cooperation in Science and Technology - COST - _____ **Secretariat** -------	**Brussels, 9 June 2011** **COST 4133/11**

MEMORANDUM OF UNDERSTANDING

Subject :	Memorandum of Understanding for the implementation of a European Concerted Research Action designated as COST Action IS1102**:** Social services, welfare state and places. The restructuring of social services in europe and its impacts on social and territorial cohesion and governance (so.s.cohesion)

Delegations will find attached the Memorandum of Understanding for COST Action IS1102 as approved by the COST Committee of Senior Officials (CSO) at its 182nd meeting on 17 May 2011.

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MEMORANDUM OF UNDERSTANDING

For the implementation of a European Concerted Research Action designated as

COST Action IS1102

SOCIAL SERVICES, WELFARE STATE AND PLACES. THE RESTRUCTURING OF SOCIAL SERVICES IN EUROPE AND ITS IMPACTS ON SOCIAL AND TERRITORIAL COHESION AND GOVERNANCE (SO.S.COHESION)

The Parties to this Memorandum of Understanding, declaring their common intention to participate in the concerted Action referred to above and described in the technical Annex to the Memorandum, have reached the following understanding:

1. The Action will be carried out in accordance with the provisions of document COST 4154/11 Rules and Procedures for Implementing COST Actions, or in any new document amending or replacing it, the contents of which the Parties are fully aware of.

2. The main objective of the Action is to compare and integrate knowledge about the features and effects of the recent restructuring of social services in national and regional contexts belonging to different welfare models, with a view to identifying best practices and contributing recommendations towards common European social policy guidelines.

3. The economic dimension of the activities carried out under the Action has been estimated, on the basis of information available during the planning of the Action, at EUR 28 million in 2011 prices.

4. The Memorandum of Understanding will take effect on being accepted by at least five Parties.

5. The Memorandum of Understanding will remain in force for a period of 4 years, calculated from the date of the first meeting of the Management Committee, unless the duration of the Action is modified according to the provisions of Chapter IV of the document referred to in Point 1 above.

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A. ABSTRACT AND KEYWORDS

In the last 20 years social services have experienced significant restructuring throughout Europe, involving cuts in public funding, devolution (from central to local governments), and externalisation (from public to private providers). Among the reasons for such changes have been stressed the fiscal crisis of the State (on the supply side) and the need to ensure greater efficiency, wider consumer choice and more democratic governance (on the demand side). Although relevant research is available on such processes, the recent global financial crisis and the awareness that, among services of general interest, social services are a major vehicle of social and territorial cohesion have brought social services back on the EU agenda. This Action seeks to involve institutions that are already carrying out research on these themes, in different nations, from different disciplinary points of view, and with different emphases, to jointly assess the effects of the restructuring processes, from 5 points of view: efficiency (cost/quality); democratic governance; social and territorial cohesion; labour; gender. The COST scheme will allow existing knowledge to be shared and valorised within a structured comparative framework, with a view to i) disseminating findings at the local and international scale; ii) identifying inputs for a European social policy platform.

Keywords: Social services, welfare regimes, restructuring, social and territorial cohesion, social innovation.

B. BACKGROUND

B.1 General background

Why social services, welfare and places

Since Esping-Andersen's characterisation of the 'Three Worlds of Welfare' (1990), social services have undergone important restructuring processes throughout Europe, although with different intensities and patterns. The main features have been: rationalisation/reduction of public funding, devolution of authority (a 're-scaling' of institutional responsibilities from central to local governments) and externalisation (a shift from the previous eminently public supply, typical of the Keynesian Welfare State, to mixed solutions involving the private sector, the third sector and the family). A significant amount of scientific research has been carried out on this restructuring in the 1990s and 2000s, at the local and national, as well as comparative European scales, tackling different aspects: regulation, funding, and production arrangements; innovative practices and social innovation; users' involvement and satisfaction; social inclusion and citizenship; urban and regional cohesion; participation and democratic governance; impact on the labour market and social work; consequences for women's position and equal opportunities; etc.

Among the main outcomes of this body of research can be mentioned: the enrichment and further articulation of the 3 'Worlds of Welfare' into at least 5 'regimes' (Scandinavian, Anglo-Saxon, Continental, Mediterranean, Eastern); a better understanding of path-dependency mechanisms, i.e. the persistence of territorial specificities in change processes; a greater awareness of 'social' innovation processes. Among the most discussed aspects of the restructuring of social services can be mentioned: the tension between efficiency imperatives (cutting costs) and social and territorial inclusion (i.e. universal access to social services, independently of origin, income and place); the tension between the growing territorial articulation of regulatory frameworks (with the establishment of 'Local Welfare Systems') and the goals of European cohesion and citizenship; the impact on the quality and conditions of social work; the effects on the position of women in society and the goal of equal opportunity.

The 2008 global financial crisis has further heightened the pressures to rationalise public spending in social services, while, on the other hand, a clearer awareness has emerged that social services cannot be treated as other 'services of general interest', because of their strong connection to social inclusion and citizenship (see section B.2).

In this context, and after twenty years of very diversified – although seemingly converging – restructuring across Europe, it seems timely to give a fresh comparative look at national/local research on the impacts of such changes, with a view to singling out policy recommendations aimed at harmonising and optimising European social policy. This comparative assessment would focus on the following main question: are the processes of decentralisation and externalisation of social services achieving greater efficiency (cost reduction and improved quality), user satisfaction, and more democratic governance (user participation and community involvement in decision-making) as claimed? What are the consequences in terms of social and territorial inclusion (is there an increase in the social and spatial differentiation of access and quality)? What about labour markets (casualisation and de-skilling of service labour) and gender (regression in the sphere of equal opportunity)?

Why COST

The above theme and issues, while of significant general scientific and policy relevance at this time, also perfectly fit the ISCH Domain of COST: welfare regimes, social policy, social cohesion, governance and citizenship, labour market. The choice of the COST framework itself – instead of a straightforward 'research' funding programme – stems from several considerations. First, the Action seeks to create a 'new' academic network – partly building on existing ones – that is open and flexible. Current participants are already carrying out research – by themselves or within existing collaborative agreements – on the Action topic, from different disciplinary points of view and with different emphases, but seek to involve new participants, thereby enlarging the exchange and comparison of scientific knowledge. Second, the Action seeks to 'defragment' the current state of research, integrating the different perspectives into a common analytical framework. Third, the Action not only seeks to support knowledge circulation among European academic institutions, but also to support capacity building at the local level, through the activation of sub-networks of non-academic local stakeholders involved in the planning/production/delivery of social services.

The COST framework will enhance the trans-disciplinary 'distilling' and blending of focussed value added from academic research and non-academic practice. Fourth, the (re)articulated 'new' network is not ready (yet) to propose a full-fledged research project (such as within ESF or the Framework Programmes), although such a project could actually become an outcome of the collaboration.

Expected benefits

The expected benefits of the Action will affect both the scientific and the practitioners' worlds. As will be better described in Section C, besides the exchange and sharing of research knowledge among participant institutions, the Action will contribute to knowledge socialisation and capacity building among local actors involved in social services.

B.2 Current state of knowledge

The state of the art in research about social services

Social services within the service sector. When in the early 1980s scholarly attention shifted from manufacturing to services, the scientific debate overwhelmingly focussed on *producer* services – i.e. services oriented to production, such as business services – and on their role in enhancing innovation, competitiveness and globalisation. It is only more recently that scholars have begun addressing services oriented to *reproduction*. The latter include activities ensuring the reproduction of *people*, such as health, education, care and other welfare services, generally called 'social services'. In the course of the third quarter of the 20th century the *public* provision of these services grew to cover nominally the whole population of most Western societies, becoming the backbone and characterising feature of the so-called Fordist-Keynesian Welfare state. Such public provision of social services had a major socio-political dimension, as it became a major vector of *social cohesion and citizenship*, which has been recognised by the European Commission in its 2007 communication on services of general interest where, after the white paper on services of general interest of 2004, a clear distinction has been drawn between services of general *economic* interest and *social services*.

The suppliers of social services. *Who* produces – and pays for – social services has relevant implications for the organisation and reproduction of societies. Research traditionally focussed on three main suppliers: a) the *state*, providing free or low-cost 'public' services to all or selected social groups; b) the *market*, in the form of private firms or self-employed people selling services for a profit to those who can pay; c) the *family*, in the form of unpaid (generally female) services work supplied and consumed within the (enlarged) family. To the above classic tri-partite taxonomy, a fourth type was recently added: d) the *third sector*, i.e. users associations, social organisations, voluntary groups, co-operatives, etc. producing services not for a profit, but for members or targeted users, for free or for a fee. The importance of this type of supplier, often identified with the 'social economy', has dramatically increased in the last twenty years, as a consequence of the restructuring of the Welfare state, sometimes supported by the state itself through subsidies or grants.

Social services and welfare regimes. Social services are a major component of *welfare systems*. In fact, the typical post-WW2 Western Welfare state was constituted of two main components: a) a more or less extended system of publicly provided/subsidised *social services*, i.e. the direct provision of *in-kind* services to people; b) a more or less extended and redistributive *social security system*, i.e. public *monetary transfers* or *cash benefits* to individuals and/or households against the risks of life (unemployment benefits, pensions, poverty or disability relief, sickness leaves, maternity/paternity leaves, etc.). Although they obey two very different logics and are, thus, conceptually quite different, in practice and in the literature, these two components are not easy to separate and are often lumped together. In fact, the two domains must be considered as *complementary* and in many cases *substitutable*.

This Action will focus on social services, but their interconnections with the general welfare system cannot be ignored, since the entity and articulation of in-kind social services and cash transfers, on the one hand, and the division of labour between state, market, and family, on the other hand, were the basis for classifying welfare models. The most cited taxonomy is Esping-Andersen's three 'Worlds of Welfare' (1990), which identified: a) the *social-democratic* or *Scandinavian* model, based on a strong role of the state and a very marginal contribution of market and family; b) the *liberal* or *Anglo-Saxon* model, based on a dominant role of the market and only a complementary role for the state; and c) the *conservative/corporatist* or *Continental* model, based on selective state provisions and family.

Since this seminal work, the debate has intensified and new typologies of welfare have been proposed. To the initial three, two more models were added: d) the *familistic* or *Mediterranean* model, mostly based on family and market, with a residual role of the state; and e) the *transition* or *Eastern European* model. In this rich debate, two main themes emerge: the existence – and persistence – of *national* models within the broad Fordist-Keynesian capitalist regime; and the *context-* and *path-dependency* of such models, i.e. the fact that each tradition is strongly conditioned by its particular regulatory and socio-cultural context.

***The restructuring of social services*.** In the last twenty years research about social services has been increasingly concerned with the restructuring – often referred to as 'modernisation'– that began in the 1980s, at the end of the 'Golden Age' of welfare state expansion, and with the new regulatory frameworks that have been taking shape, as a consequence of several transformative pressures. On the one hand, there were *bottom-up* pressures, such as users claims for greater choice, increased participation in the production-delivery cycle of social services and more democratic and accountable governance systems; on the other hand, there were *top-down* pressures, essentially related to the fiscal crisis of governments and the imperatives to cut public expenditures. The two pressures found some sort of convergence in the Post-Keynesian discourse of liberalisation and 'subsidiarity'. In fact, since the early 1990s the restructuring of the welfare state in general, and of social services in particular, has been guided by principles of competitiveness and what Kazepov (2008) has labelled 'vertical' and 'horizontal' subsidiarity: on the one hand, a territorial devolution of authority from the central state to local governments; on the other hand, a process of liberalisation and externalisation (outsourcing) with the involvement of new for profit and non-profit actors in the production/delivery of social services . In general, thus, the restructuring of social services in Europe has followed three main – overlapping – strategies:

1. A reduction in public expenditures and/or financial support of social services, which has inevitably involved an increase in selectivity and/or an increase in user fees or contributions.

2. The externalisation, privatisation and liberalisation of service production, entailing – among other things – a growing involvement of both users and the Third Sector.

3. A scalar re-articulation of authority, from the national to the local governments, entailing a growing responsibility of the local administrative level in the planning, funding and delivery of social services.

The above general processes have involved in different ways and to different extents the five individual phases/components of the service production/delivery process: i) regulation; ii) funding; iii) planning; iv) production; v) delivery. The role retained by the state in each of these phases – and conversely, the role shifted to private providers, the third sector and the family – significantly affects outcomes.

The territorial dimension of restructuring. The Post-Keynesian restructuring of the Welfare state and social services is strongly path-dependent and context-specific. In investigating social services there is, thus, a tension between the overall restructuring philosophy encompassing all European member states and the place-specific 'declinations' or 'profiles', conditioned by the socio-cultural, economic and institutional contexts . This means that apparently similar regulatory/organisational arrangements may yield different results in terms of access, quality, working conditions etc. in different *places*. The territorial context is thus a relevant analytical dimension and several EU-funded research projects have addressed the relationship between urban policy, social inclusion and neighbourhood regeneration across different countries (4th Framework Programme projects Urban Redevelopment and Social Polarisation in the City, URSPIC 1997-99; Between Integration and Exclusion: A Comparative Study in Local Dynamics of Precarity and Resistance to exclusion in Urban Contexts, BETWIXT 1998-2001; 5th Framework Programme project Urban development programme, urban governance, social inclusion and urban sustainability, UGIS 2000-03).

Moreover, in the diversified panorama of national, regional and local 'experiences' of change, both highly innovative and simply 'retrenching' practices can be observed. A number of recent EU-funded projects have actually focussed on such innovative practices, thereby bringing to the fore the strategic notion of 'social innovation' (5th Framework Programme project Social Innovation, Governance and Community Building, SINGOCOM, 2001-04; 6th Framework Programme KATARSIS 2006-09; 7th Framework Programme project SOCIAL POLIS, 2007-10).

What's new

The financial crisis and social and territorial justice. The recent global financial crisis has added further stress to the above long-term changes, making imperative a focussed assessment of what has been done so far, in order to understand what strategies should be further pursued and what should be avoided or corrected. In the literature the evaluation of the economic and social impact of the last twenty years' restructuring is fragmented, mixed and ambivalent. On the one hand, scholars stress the benefits of territorial devolution and Local Welfare Systems (LSF), as well as the greater satisfaction of (some) users brought about by the greater diversification of services and the opening of service supply to third parties (Pavolini and Ranci 2008); on the other hand, they also voice concern about the increased fragmentation and territorial differentiation of welfare systems, with the associated (risks of) growing funding uncertainty, user discrimination, and social exclusion. These same concerns are expressed by the European Commission in the 2007 document 'Services of general interest, including social services of general interest: a new European commitment', where the special mission of social services in ensuring social cohesion and the need to safeguard equal access independently of income, origin and place, as well as adequate public support, legal certainty and transparency towards citizens, is stressed (pp. 7-8). The European Commission also underlines the need to establish common rules and principles, while respecting national diversity. But there are also other consequences of the current restructuring that must be considered. In fact, it is important to keep in mind that social services perform a double role: they supply *services*, but they also provide *employment*. Moreover, they introduce new balances of care/reproductive work in households and in the gender divisions of labour therein.

Therefore, the consequences of change must be assessed not only with regard to service *users*, but also with regard to service *workers*. Externalisation, privatisation and liberalisation processes tend to shift onto private providers (often self-employed) and communities (Third sector, voluntary organisations) the production of services, in a context of reduced or no public funding. This often involves a precarisation, casualisation and de-professionalisation of service workers, which has negative consequences not only in terms of salaries and career opportunities, but also in the regulation and reproduction of professional knowledge and skills. A paradox is unfolding in the labour market: increased professional training on the supply side vs. worsening salaries, contractual conditions, and exploitation, on the demand side. These changes particularly affect women, who are both *users* and *providers* of social services. As a wide body of literature and research has stressed, the Fordist-Keynesian welfare regime with its public provision of social services represented an important 'professionalised' work opportunity for women. When the restructuring of social services involves the contraction of such jobs and/or the reduction in access to such services, women may be driven back into their traditional role of family care givers.

An innovative look at long-standing issues. The literature remains somewhat segmented, whereas comparative work is often limited to quantitative assessments, which only partially account for qualitative changes. Moreover, the actual impacts of a twenty-year-long process can only now begin to be fully appraised. Finally, and most importantly, the analysis of social services must involve both sides of the supply relation, i.e. users *and* providers. The methodology proposed in this Action seeks to enhance a structured comparative assessment of existing research that integrates the following 5 points of view:

1. *Cost effectiveness.* The imperative of cutting public expenditures and reducing bureaucracy is the chief driver of restructuring processes in social services. But cost effectiveness must be measured in relation to the quality of services and users' satisfaction.

2. *Democratic governance.* This is among the stated aims of the recent restructuring. But both the horizontal and the vertical 'subsidiarisation' processes have in many instances increased the fragmentation of authority and funding and thus decreased the accountability and reliability of social services provision.

3. *Social and territorial cohesion.* Among the dangers of the recent restructuring of social services must be stressed increased user discrimination and a reduction in universal access, which may amplify exclusion processes, either social (e.g. based on income or citizenship) or territorial (e.g. between rich and poor regions, cities, neighbourhoods, whether in financial or social capital terms).

4. *The labour market.* The quality of services depends very much on the quality and skill content of service work. The shift to a plurality of service producers and the growing involvement of private and non-profit providers often involves a deregulation of the labour market that can lead to segmentation, casualisation and deskilling of social workers, with consequences also on output.

5. *Equal opportunities.* Here too changes must be assessed from both the demand and the supply side. Since women are both users and providers of social services, the restructuring of such services has a significant impact on equal opportunities (not only for women, but also other vulnerable social groups such as youth and immigrants).

Thus, although it builds on past research, including EU-funded projects, the innovative approach of this Action lies in the following features of its analytical framework: i) the *holistic approach*, which integrates the multiple socio-economic implications of social services, from both the demand and the supply sides; ii) the *multi-disciplinary team* of experts (which includes urban planners, sociologists, economists, geographers); iii) the *trans-disciplinary aim*, i.e. the fact that the comparative exchange and assessment of knowledge will occur not only among academic researchers, but also between these and local non-academic actors involved in the planning, production and delivery of social services (see sections D and E); iv) the *territorial dimension*, since research evidence will be compared across different *places*, trying to assess, on the one hand, the role of context specificities (e.g. which type of civil society and welfare regime frames which type of service delivery arrangement?) and, on the other hand, the potential for 'up-scaling' (which regulatory frameworks or macro-policies are needed for the efficient and inclusive local delivery of social services?); v) the strong *policy* orientation, as the Action seeks to provide recommendations towards a common European social policy platform ensuring European citizenship while allowing for diversity.

Among the above a major scientific innovation is the link the Action seeks to establish between research and practice, based on a knowledge alliance that respects and mobilises different forms of knowledge. Understanding a complex issue such as social services cannot be reduced to academic research on problems that have already been defined; it needs in-depth 'trans-disciplinary' knowledge about how things actually work or do not work, as gained in specific contexts by local actors. This is actually the key challenge for the European Research Area, as stated in the *2020 Vision for the European Research Area* adopted by the Council in 2008 and the *Lund Declaration of 2009*, both of which call for a new deal in European research and advocate that the identification of societal challenges must engage the major stakeholders (see the Report of the MASIS Expert Group set up by the European Commission titled *Challenging Futures of Science in Society,* 2009).

B.3 Reasons for the Action

Reasons. As mentioned in the previous section, there are four main *reasons* for launching the Action at this time: a) the added stress brought about by the 2008 global financial crisis on public spending; b) the increased awareness at the EU level that social services – among services of general interest – have very relevant and interconnected implications for social and territorial inclusion and citizenship; c) the possibility, after 15-20 years of welfare state restructuring throughout Europe, to fully assess the actual impact of changes in the organisation and delivery of social services, from the integrated perspective identified earlier; d) the desire to create a new European network.

Objectives. The Action has three inter-related aims. The first is, obviously, *scientific* advance, through the sharing and comparison of (academic) knowledge across countries and the identification of new research issues and directions. The second – perhaps more important – is a *societal* aim, through capacity building and dissemination of knowledge about the complex implications of the social services production/delivery process in non-academic circles, through the mobilisation of national and local stakeholders (policy makers, service administrations, service providers and workers, users). This is actually the most innovative aspect of the Action, as the interaction between academic and non-academic knowledge features a trans-disciplinary form of knowledge production and dissemination. Finally, there is a *policy* aim, i.e. exploiting the added value of comparative and trans-disciplinary knowledge to formulate inputs of potential interest for policy makers, towards a European social policy framework.

Means. The main *means* to achieve the above aims will be: i) the creation of a two-tiered network (among research institutions and with national/local actors) geared to the structured comparison, mutual valorisation, and dissemination of knowledge on social services, through digital communication, workshops and conferences, and STSM; ii) the establishment of an Action website; iii) publications, both academic and non-academic.

Results and benefits. The immediate benefit of the Action will be the creation of awareness and shared knowledge among different countries and actors about the complex implications of social services and their restructuring. The future benefit will be the application of results for better local, national and possibly European social policy frameworks and the possible configuration of a full-fledged cooperative research proposal.

B.4 Complementarity with other research programmes

Issues related to the topic of this Action have been investigated in several past EU-funded research projects (see section B.2), in which some of the experts and institutions that proposed this Action were individually involved. Among those projects, particularly influential for the methodology of this Action has been the recently completed 7th Framework Programme Coordination Action *SOCIAL POLIS-Social Platform on Cities and Social Cohesion* (2007-10), which created a network of local stakeholders actively engaged in the project and adopted a trans-disciplinary and multi-scalar approach.

Among current European research projects, links will be established with the recently funded 7th Framework Programme Socio-economic Sciences and Humanities (FP7-SSH) projects *WILCO-Welfare Innovations at the Local level In favour of Cohesion* (2010-13) and *FLOWS-Impact of local welfare systems on female labour force participation and social* cohesion (2011-14), which focus, respectively, on welfare and social cohesion, and on gender issues. Selected partners of these projects will be invited to join the Action, to share their findings within the proposed analytical framework.

While building upon the findings of past projects and planning to interact with on-going ones, this COST Action maintains a strong specificity because of its integrated and trans-disciplinary comparative approach, which links social services with social and territorial inclusion, citizenship, governance, equal opportunities and the labour market.

C. OBJECTIVES AND BENEFITS

C.1 Main/primary objectives

The main objective of the Action is to share and compare knowledge about the features and effects of the recent restructuring of social services in different national/regional contexts from five points of view a) efficiency; b) democratic governance; c) social and territorial cohesion; d) labour market; e) gender, with a view to identifying regulatory conditions, organisational configurations, and actual practices that maximise benefits from some or all the above points of view, thereby contributing recommendations to establish basic common European social policy guidelines. Among social services, the Action will especially focus on care services. This general objective will be pursued through the construction of a flexible and open network for the structured exchange of comparative knowledge, analytical methodologies and research findings. Expected deliverables include: a network website (which will host the network programme of activities, a forum, selected research materials, as well as some workshops and conferences proceedings); a small data bank or repository of innovative local practices; academic and non-academic publications valorising some of the results.

C.2 Secondary objectives

The above main objective is articulated in four *secondary objectives*:

1. *A comparison of the regulatory frameworks, institutional geometries* (i.e. division of responsibility between national, regional and local government) *and organisational configurations* (i.e. division of labour between state, market, third sector and family) in the funding, planning, production and delivery of social services, as they result from the restructuring of welfare systems in different nations/regions across the 5 'Welfare traditions' over the last twenty years. Particular attention will be given to differences in trajectories and path-dependency in explaining 'place' specificities.

2. *A comparison of concrete experiences and practices* (case studies) in the area of *care services*, in order to assess the specific features and effects of the restructuring, from five perspectives:

- Cost efficiency in relation to quality: did the restructuring bring the expected reduction in public expenditures, increase in users' choice and satisfaction, as well as improved quality of services? Why? Why not?

- Democratic governance: did the re-scaling of authority and externalisation/privatisation of supply bring about greater citizen participation, greater democracy in decision-making processes, improved subsidiarity and optimised co-operation among actors? Why? Why not?

- Social and territorial cohesion: did the restructuring maintain universal access, i.e. access to social services for all, regardless of origin, income, and place, while ensuring diversification and customisation of services? Why? Why not?

- Labour market: what are the consequences of the restructuring of social services on the skills and contractual conditions of social service workers? Is there an increase in the casualisation and deskilling of work? Why? Why not?

- Gender: how does the restructuring of social services affect/intensify gender differences and inequalities, i.e. access to the labour market, quality of employment, gender divisions of labour in the household and among state, market and family? Is it increasing differentiation in care deficits among social groups and places (e.g. migrant households, young families)? Why? Why not?

3. *The identification of both positive and negative experiences*, with a view to singling out the most enabling institutional frameworks and production arrangements and their potential for transferability. In particular the network will test the hypothesis that multi-scalar and multi-actor governance in social services works best in contexts with robust *regulatory* frameworks, that ensure well-defined rules and boundaries, guaranteed 'minimum welfare standards' for all, and safeguarded labour conditions.

4. *Knowledge and capacity building*, via the socialisation and dissemination of knowledge, in all three of the above tasks, i.e. in the gathering, comparison and evaluation of evidence, among other researchers, policy makers, service providers and service users, at the local, national and international levels (see section H for further details).

In terms of measurable outcomes (see also sections D and E), the above will involve: the creation of an articulated website for posting and exchanging the discussion in progress; the organisation of periodical local and network workshops, as well as conferences open to broader audiences; working papers and scientific progress reports and proceedings (some of which will be posted on the website and made available to the broader public); academic publications; recommendation papers oriented to local, national and EU policy makers.

C.3 How will the objectives be achieved?

In conformity with the COST philosophy, *networking* will be the main mechanism to achieve both scientific advancement and societal progress, via capacity building and dissemination. No research personnel will be hired and the Action will focus on the exchange, comparison, integration and dissemination of knowledge coming from on-going research and practice, through *structured interaction*. No special equipment will be needed as participant institutions and actors will rely on existing communication infrastructure.

The network will be a two-tiered one: on the one hand there will be the network of scientific experts/institutions participating in the Action, which will ensure the structured exchange, comparison and integration of research across different countries and welfare regimes, as well as the implementation of the Action; on the other hand, each party will activate a national/local network of actors and stakeholders engaged in the planning, production and delivery of social services. The latter form of networking will not only ensure the cross-fertilisation between academic and non-academic knowledge, but also the dissemination and capacity building included in the fourth sub-objective (see section C.2).

Interaction will be ensured in two main forms: a) digital communication and an Action website; b) face-to-face interaction, through workshops, conferences and STSMs.

The Action *website*, will be a major interaction, dissemination and capacity building medium. It will be structured in sections with differentiated access (see section H). A special section will be devoted to hosting information about different local social service experiences, i.e. a sort of 'repository' of good practices and a forum open to the broader public. In order to implement and update the website a part-time web-master will be hired.

C.4 Benefits of the Action

The expected benefits of the Action are both in terms of scientific progress and responding to societal needs. They can be described under three headings:

1. *Scientific value added*: structured comparative exchange of knowledge within the academic community and formation of shared competences, focussing on the dialectics between national/local path-dependencies and European institutional convergence; identification of relevant issues for further research; context for the possible design of a full-fledged research project.

2. *Capacity building and dissemination*: creation of shared and mutually enriching trans-disciplinary knowledge between scientists and local stakeholders and actors involved in the planning, production and delivery of social services; enhancing the diffusion of social innovation.

3. *Policy making*: the eventual identification of virtuous institutional geometries, organisational arrangements and delivery practices and the assessment of their transferability in terms of policy guidelines for an integrated European social policy framework; up-scaling and institutionalisation of socially innovative regulatory and productive arrangements.

C.5 Target groups/end users

Three main groups of users will be involved and will exploit the outcomes of the Action:

1. The *scientific community* will obviously be enriched by the exchange and comparison of knowledge in the different local and national contexts.

2. The national and local *actors* involved in the planning/production/delivery of social services (policy makers, service administrations, public, private and non-profit service providers, users, and the civil society at large) will also benefit from the exchange of knowledge, capacity building and dissemination involved in the Action. The involvement of these end users is actually one of the innovative aspects of the Action.

3. *Policy-makers* – at local, national and possibly European level – are the last, but not least, end user targeted by the Action, since one of its main aims is to provide policy inputs.

D. SCIENTIFIC PROGRAMME

D.1 Scientific focus

As stressed in section C.1, the ***focus*** of the Action is comparing the *features* and *effects* of the recent restructuring of social services in different national/regional contexts, from five points of view: a) efficiency; b) democratic governance; c) social and territorial cohesion; d) labour market; e) gender. *The main aim is to identify regulatory conditions, organisational configurations, and actual practices that maximise benefits from some or all the said points of view, in order to contribute recommendations for a common European social policy platform*. This will be pursued through the construction of a flexible and open network for the structured exchange of comparative knowledge, analytical methodologies and research findings. Among social services, the Action will especially focus on *care* services.

Throughout the Action, *space* and *spatial articulations* will represent a major analytical dimension. Although regulatory environments are still eminently national, the restructuring of the last twenty years has brought new spatial scales into play, both higher (European principles and programmes) and lower (the shift of authority to the regional and municipal scales). What these changes imply in terms of *territorial* cohesion and access will be especially considered: firstly, in terms of differentiation and convergence among national/regional models; secondly, in terms of spatial distribution, quality and accessibility of social services in relation to recent urban trends such as the increase in multi-culturality, social fragmentation and socio-cultural segregation.

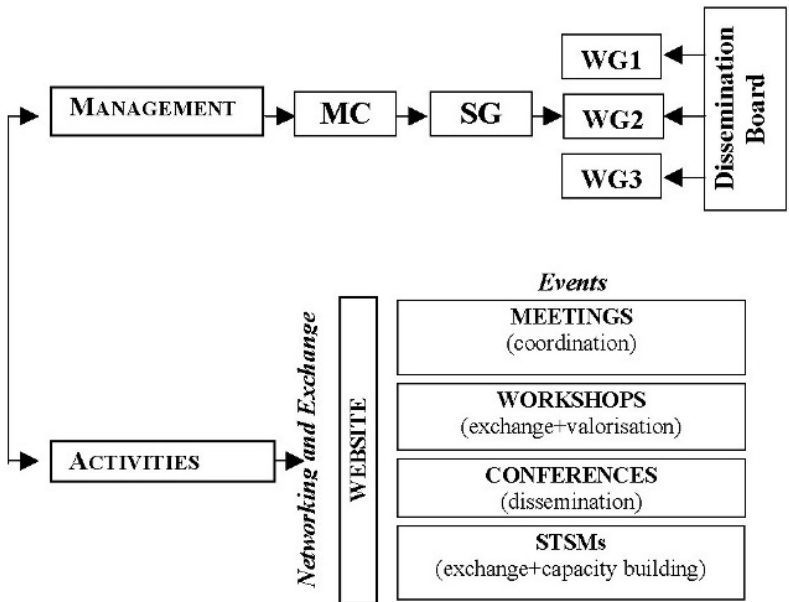The Action will be structured in four main ***Tasks***:

- Task 1. Comparison of regulatory frameworks and organisational trajectories in social services.

- Task
- Task 3. Comparative assessment of practices, oriented to providing policy inputs.

- Task 4. Dissemination and capacity building.

The first three Tasks are roughly sequential (see Chart F.1), whereas the fourth is transversal. The first three Tasks will be carried out by three, corresponding, *Working Groups*, each coordinated by a *WG Leader*. Efforts will be made to ensure the presence of at least one country per welfare regime – in each Working Group. The fourth Task will be carried out by all participants, throughout the duration of the Action, and will be coordinated by a *Dissemination Board* (see Section E.1).

The ***means*** to achieve the Tasks will involve: a) *networking and exchange* activities (mostly on line, but also through events); b) *events* (organisational meetings, workshops and conferences, Short-Term Scientific Missions); c) *dissemination* of knowledge and findings. Besides the *human* resources involved in sharing and valorising existing research, a major technical mean of communication, exchange and dissemination will be the Action *website* (see section H).

Events will be of three types. *Organisational Meetings* (Ms) are coordination events involving all or some of the participants (e.g. Management Committee meetings or Working Group meetings) and will be held to organise the network activities; *Workshops* (WSs) are working events oriented to the presentation and sharing of research findings and will be of two types: a) *network* workshops (among institutions involved in the Task); b) *local* workshops (open to external experts and/or local actors); *Conferences* (Cs) are events organised for the dissemination of findings and will be oriented to broader communities. *Short-Term Scientific Missions* (STSMs) will also be organised to enhance exchanges among specific participants, especially oriented to early-stage researchers. *Deliverable* (Ds) i.e. actual output of activities, will be in the form of written reports, publications, and newsletters, many of which will be posted on the Action *website*.

Chart D.1 – Management & Activities

D.2 Scientific work plan – methods and means

A) Scientific Work plan

In the Work Plan that follows, the aims, activities, methodologies and output of the four Tasks of the Action are synthetically presented.

Task 1. Comparison of regulatory frameworks and organisational trajectories in social services. (Months 1-12)

Aims. The aim of this task is to assemble the state of the art and compare the *regulatory frameworks, institutional geometries and organisational configurations* in the funding, planning, production and delivery of social services, as they have resulted from the restructuring of welfare systems in different nations/regions across the 5 'Welfare traditions' over the last twenty years.

Responsibility, activities and deliverables. This task will be carried out by *Working Group 1*, coordinated by a WG1 Leader, and will involve the following activities and deliverables:

- M1.1. *Working Group* organisational meeting to share preliminary knowledge, design a template for structured comparison and presentations, and plan activities.
- WS1.1. *Working Group* workshop for the structured presentations and discussion of national/local state of the art results of restructuring in social services.
- C1.1. Parallel *local* conferences will be organised to present and validate findings with local actors.
- D1.1. Brief national/local reports, in the form of internal working texts, posted on the website.
- WS1.2 *Network* workshop to present, compare and discuss national reports.
- D1.2. Final report (comparative synthesis). This deliverable also represents the Task's major milestone.
- E1.1. Self-evaluation exercise to assess the achievement of the objective of Task 1.

Task 2. Analysis of the effects of changes in care services. (Months 10-36)

Aims. This is the central Task of the Action. Its aim is to identify, evaluate and compare current experiences and practices – i.e. *concrete case studies* – in the area of *care services*, in order to assess the effects of the restructuring of social services, from 5 perspectives: a) cost efficiency in relation to quality, choice, and satisfaction; b) democratic governance; c) social and territorial cohesion; d) labour market; e) gender.

Responsibility, activities and deliverables. This task will be carried out by *Working Group 2*, coordinated by a WG2 Leader, but it will significantly involve local actors. It will encompass the following activities and deliverables:

- M2.1. *Working Group* organisational meeting to share preliminary knowledge, design templates for structured comparison and decide methodologies for workshops and national reports. In this meeting, case studies will also be proposed and activities planned.
- WS2.1. Parallel *local* workshops with local actors will be organised to share and exchange knowledge on case studies. 'European Awareness Scenario Workshop' and 'Focus group' methodologies will be used to frame the discussion in these workshops.
- D3.1. Establishment of a special section on the website containing the Action's *repository* of both innovative and poor practices in the area of care services, as well as a discussion forum. This deliverable – which will be constantly integrated and updated – will represent a major milestone of the Task.
- WS2.2. A *Working Group* workshop will be held to compare findings about case studies according to the different perspectives.
- E.2.1. Intermediate self-evaluation exercise to assess progress towards the achievement of the objectives of Task 2.
- D2.2. National/local reports on case studies, in the form of brief internal working texts, posted on the website.
- C2.1. International conference to present and discuss national reports.
- D2.3. Final report (comparative synthesis). This deliverable will represent another major milestone of the Task.
- E.2.2. Final self-evaluation exercise to assess the achievement of the objectives of Task 2.

Task 3. Comparative assessment of practices, with a view to providing policy inputs for a European social policy platform. (Months 34-48)

Aims. The aim of this task is to sort out from the evidence gathered and compared in the previous task, both good and poor practices, in order to identify the most enabling institutional frameworks and production arrangements and their potential for transferability. In particular, the practices enhancing efficiency, quality and user satisfaction, democratic participation, social and territorial cohesion, good working conditions, and equal opportunities will be singled out. Contextually, the hypothesis that multi-scalar and multi-actor governance in social services works best in contexts with robust regulatory frameworks that ensure universal access, 'minimum welfare standards' for all, and basic labour protection will be tested.

Responsibility, activities and deliverables. This task will be carried out by ***Working Group 3***, coordinated by a WG3 Leader, and will encompass the following activities and deliverables:

- M3.1. *Working Group* organisational meeting to discuss templates for assessing practices and methodologies for workshops and national reports.
- WS3.1. Parallel *local* workshops with local actors will be organised to share and exchange assessments of case studies.
- WS3.2. A *Working Group* workshop will be held to compare assessments of practices, explore transferability and propose policy recommendations.
- D3.1. National/local assessment and recommendations reports, in the form of internal working texts, posted on the website.
- C3.1. *International* conference to present and discuss national reports with EU, national and local officials and policy makers, as well as selected local stakeholders. This conference will also represent the Task's major milestone.
- D3.3. Final policy recommendation report.
- E.3.1. Self-evaluation exercise to assess the achievement of the objectives of Task 3.

Task 4. Dissemination and capacity building (Months 1-48)

Aims. This is a transversal task. Its aim is the dissemination – socialisation – of knowledge, with other researchers, policy makers, service providers and service users, at the local, national and international levels (see section H for further details), as well as the construction of awareness and proactive attitudes in policy and practice arenas, throughout the Action.

Responsibility and activities. This task will be carried out by ***all participants*** involved in the different WGs, under the coordination of the ***Dissemination Board*** (see section E.1). In Task 1, dissemination will especially focus on sharing and socialising the Action's conceptual framework and findings concerning the regulatory environment, the institutional geometries and the organisational configurations of social services among local actors (policy makers, service administrators, service providers, civil society, users, etc.) in each territorial context. In Task 2, dissemination will be especially oriented to capacity building at the local level, but also to obtain field knowledge to enrich academic research. It will, thus, promote a broader discussion and exchange, with the aim to share and reciprocally validate academic and non-academic knowledge. In Task 3, dissemination and capacity building will involve the shared identification and assessment of best practices and their transferability for policy purposes.

Deliverables. This Task's first deliverable will be setting up the *website*, which will also be a relevant *milestone*. Other outputs will be in the form of information, news, and working reports, mostly published on the website for the broader public, but also in the form of scientific papers presented at conferences and published in the academic press. An important role will have the *repository of practices*, a special section on the *website*, open to local actors and the public at large, where innovative experiences, as well as failures in the planning, production and delivery of social services will be posted and a forum will, possibly, be organised.

Evaluation. The progress of this Task towards the achievement of its objectives will be periodically assessed (at the end of each year of the Action), through a self-evaluation exercise. This will allow the MC to introduce corrective measures, in case the objectives are deemed to be insufficiently attained.

B) Methods and means

Throughout the Action, the following methods and means will be deployed.

- The design and use of *Templates* – shared analytical frameworks to gather information and 'frame' presentations and reporting – will be a major method to ensure comparability and structured discussion throughout the Action. They will include selected criteria and indicators for comparing and evaluating experiences and practices.

- The formation of *local networks* of non-academic actors and stakeholders involved in the planning, funding, production and delivery of social services – with a special focus on care services – will be another major mean for exchanging and bridging different forms of knowledge about the evolution of welfare systems and their impacts. Local workshops involving such networks will be especially useful in Task 2, where they will act as veritable laboratories of exchange and reciprocal enrichment and validation of knowledge. In these workshops methodologies such as 'EASW' and 'Focus groups' will be applied.

- The *website* will be a central means of communication, exchange and dissemination (see section H). It will act as a veritable 'hub' of the network and sub-networks activities, hosting news, selected reports and proceedings, as well as the 'repository of good practices'.

- *Self-evaluation* exercises will be carried out periodically (at least once a year, generally in the context of the management reporting procedure) at the level of each participating institution and under the coordination of WG Leaders and the Dissemination Board (for their respective tasks), to monitor activities and assess whether the Tasks' objectives are being/have been reached.

E. ORGANISATION

E.1 Coordination and organisation

At present the Action involves 8 institutions, in 7 COST countries. They have joined efforts on the basis of three main criteria: a) quality and thematic focus of their work; b) methodological affinity; c) a wide European dimension and a balanced representation of the 5 European welfare regimes. A few more participants responding to the same criteria might join if the Action is funded, depending on the size of the overall budget.

A) Organisational structure

The Action will be coordinated through a typical COST management structure. This will include: a Management Committee (MC); a Steering Group (SG); three Working Groups (WGs) and a Dissemination Board (DB).

The *Management Committee* (MC), formed according to COST rules, will:

- supervise and monitor the scientific progress and the coherent advancement of the Action, also through periodic self-evaluation procedures;

- draw up detailed work plans for the different Tasks and coordinate the contribution of the different participants, as well as the forms of liaison with other research groups and institutional actors;

- coordinate and draw up the annual progress and final reporting requirements;

- supervise the allocation of the budget and monitor the financial reporting;

- evaluate new institutions applying to join the Action.

The *Steering Group* (SG), composed of the Chair, the Vice-Chair, and the WG Leaders, will be a more agile operational structure, which will advise the MC and implement its strategies, under its strict supervision. It will especially ensure:

- scientific coordination of the Tasks;

- harmonisation of the methodological framework and WG activities;

- efficient horizontal interaction among parties;

- implementation of the Action's *website*, including its design and updating;

- coordination of STSMs.

The *Working Groups* (WGs) will ensure the implementation of the first three Tasks in the Scientific Programme (see section D). There will be three WGs, each coordinated by a *WG Leader*, who will ensure the coordination of the activities. In the cases where more than one institution per party will be involved (this is at present the case of one country, justified by its profound regional differences), the WG Leaders will make sure that the different national teams work in close co-operation and with methodological harmony.

A *Dissemination Board* will be established, composed of the Vice-Chair, representatives from the WGs, and the Web master. It will ensure the implementation of the Action's dissemination strategy and coordinate the publication of the Action's results on the website, in the local press, and in scientific journals and publications. The DB will also draw up a plan for the periodic monitoring and constant updating of the website.

B) Activities, means and milestones

The Action will be implemented through different types of activities and means, some of which will represent crucial milestones in the progress towards the achievement of objectives.

On-line interaction. This will be the main medium of communication, coordination, and exchange within the network, through the use of nested e-mail lists, conference communication, and interaction on the website.

Website. The website will be a major dissemination tool of the Action (see Section H). To ensure an efficient and well-articulated website, as well as its continuous updating with the Action's scheduled activities and progress, the Action will seek the support of a part-time web administrator. A plan for the periodic monitoring and updating of the website will be drawn up by the Dissemination Board.

Coordination meetings. These will be events devoted to organise and coordinate the activities of the network.

- *Management Committee meetings.* Besides the 'Kick-off' meeting, there will be at least one annual meeting of the MC, devoted to finalising the annual reporting, monitoring the progress of the Action and launching the following year's programme.

- *Steering Group meetings.* The SG will interact mostly electronically; meetings will be held according to need.

- *Working Group meetings*. These meetings, devoted to planning and coordinating the WG activities, will be held at least once (at the beginning) for each WG (see section D).

Workshops. These are structured 'working' events, organised to exchange and valorise knowledge, as well as to build capacity, internally and externally.

- *WG workshops* are workshops involving mostly the WG parties (with or without invitees, i.e. external experts, privileged witnesses, representatives from other EU-funded projects); there will be at least one per WG.

- *Local workshops*, are parallel working events organised by parties at the national/local level, mobilising local stakeholders, i.e. actors involved in the planning, production and delivery of social services, as well as users, in order to gather, exchange and validate different forms of knowledge. These workshops will be organised by each WG (see section D).

Conferences. These are valorisation and dissemination events, organised to present the Action findings to the scientific and broader communities. There will be both local and international conferences (see section D).

In consideration of the size of the overall Action budget, efforts will be made to schedule meeting, workshops, and conferences in adjoining dates, so as to optimise travel and subsistence expenditures.

Short-Term Scientific Missions. A number of STSMs by Early-Stage Researchers from one country to another are envisaged and will be programmed depending on resources and opportunities.

Milestones. These will coincide with selected and qualifying deliverables, within each of the Action's Tasks (see Work plan in section D.2). For Task 1 the chief milestone will be the Final comparative synthesis report, due around Month 12. For Task 2 there will be two milestones: the set-up of the 'repository of concrete experiences', both innovative and poor, in the area of care services around Month 16; the Final comparative synthesis report around Month 36. For Task 3 the chief milestone will be the international conference presenting the results of the Action around Month 45. For Task 4 the chief milestone will be the establishment of the website, around Month 3.

Chart E.1 - Management Structure and Scientific Organization

MANAGEMENT STRUCTURE
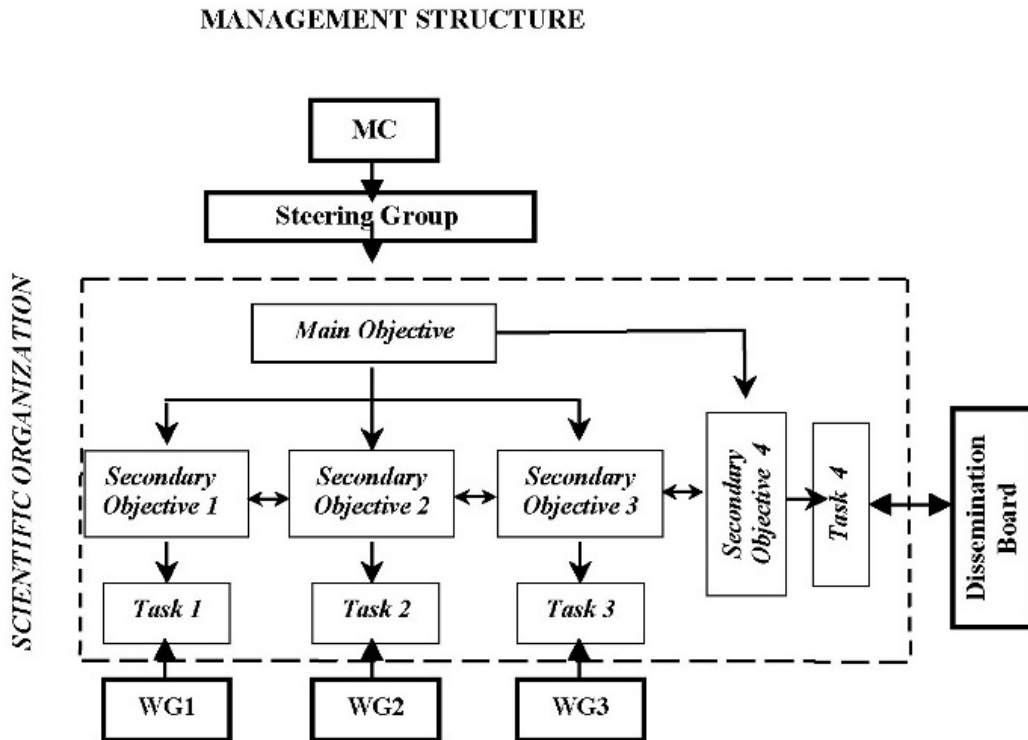
E.2 Working Groups

As explained in section D.2, *Working Groups* will be major organisational players in the implementation of the Action. There will be 3 WGs, one for each of the first 3 Tasks:

- WG1. Comparison of regulatory frameworks and organisational trajectories in social services.

- WG2. Analysis of the effects of changes in care services.

- WG3. Comparative assessment of good practices, to provide policy inputs.

A distinctive feature of the Working Groups is that they will not only mobilise the *researchers* institutionally involved in the Action, but also international, national and especially *local stakeholders* – including experts, legislators, policy makers, civil servants, service providers (public, private, non-profit), civil society organisations, and users. This will allow trans-disciplinary exchange, valorisation and validation of knowledge, as well as a wide dissemination of findings.

E.3 Liaison and interaction with other research programmes

To the best of our knowledge, there are no other COST Actions currently addressing the specific topic of this Action. COST Action IS0603 (Health and Social Care for Migrants and Ethnic Minorities in Europe, ending in May 2011) is the only Action tangential to this one, with which steps will be taken to exchange relevant knowledge.

With regard to other EU programmes, as mentioned in section B.3, there are two 7th Framework Programme collaborative projects that have been just funded (WILCO starting December 1, 2010 and FLOWS starting January 1, 2011). With these projects the Action, if funded, will seek to establish forms of interaction and liaison.

First, a few of their partners might be contacted to join this Action as participants, in order to improve the representation of the 5 European welfare regimes and the networking reach. However, this strategy will necessarily be evaluated in relation to the amount of funding. Secondly, exchanges of information will be organised, by inviting selected researchers of those projects to attend WG workshops and conferences, as well as through STSMs. Finally, reciprocal access to the working material posted on the respective websites will be sought.

E.4 Gender balance and involvement of early-stage researchers

This COST Action will respect an appropriate gender balance in all its activities and the Management Committee will place this as a standard item on all its MC agendas. The Action will also be committed to considerably involve early-stage researchers. This item will also be placed as a standard item on all MC agendas.

The network of experts involved in the preparation of this Action is rather unbalanced in favour of the *female* gender. The large majority (68%) of the experts that have actively participated in the preparation of the Action or otherwise indicated their interest are indeed women. This may partly be attributed to the topic of the Action, which seems to attract greater interest from women. Nonetheless, if the Action is funded, efforts will be made to ensure a better representation of the male gender.

As to the involvement of *Early-Stage Researchers*, 53% of the experts that have actively participated to the preparation of this Action, or have otherwise indicated their interest, correspond to this category. It was actually a major inspiring principle of the proposing network to ensure the participation, in each institution, of one senior researcher and as many junior researchers as available. If the Action is funded and other institutions join the network, the same principle will be applied. In any event, the MC will ensure that the participation of Early-Stage Researchers to workshops and conferences is maximised, subject to budget constraints, and that the STSM budget is mostly reserved to this category.

F. TIMETABLE

The Action will have a total duration of four years (48 months). The first three Tasks are roughly sequential, with some overlapping, whereas the fourth is transversal:

- Task 1. Comparison of regulatory frameworks and organisational trajectories in social services (Months 1-12).

- Task 2. Analysis and comparison of the effects of changes in care services, with the help of case studies (Months 10-36)

- Task 3. Comparative assessment of practices, oriented to providing policy inputs (Months 34-48)

- Task 4. Dissemination and capacity building (1-48)

Chart F.1. Timetable of Action

YEAR	1				2				3				4			
Quarter	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Task 1																
Task 2																
Task 3																
Task 4																

G. ECONOMIC DIMENSION

The following COST countries have actively participated in the preparation of the Action or otherwise indicated their interest: AT, BE, CZ, DK, EL, IT, UK. On the basis of national estimates, the economic dimension of the activities to be carried out under the Action has been estimated at €28 Million for the total duration of the Action. This estimate is valid under the assumption that all the countries mentioned above but no other countries will participate in the Action. Any departure from this will change the total cost accordingly.

H. DISSEMINATION PLAN
H.1 Who?

In this Action, dissemination and capacity building are a central dimension of the process of sharing, building up/developing, and valorising knowledge about the restructuring, the issues and the best practices in social services. Therefore, dissemination is *not* conceived as an *ex post* activity, i.e. disseminating the 'results' of the network exchanges, but a *built-in* activity, from the very beginning of the Action and throughout its three main tasks, aimed at sharing and valorising knowledge, not only among those research institutions participating to the Action, but also among academic and non-academic actors, i.e. policy makers, service administrations, service providers, and users – mostly at the local level, but also at the national and European levels.

Four main audiences are targeted in the dissemination and capacity building of our Action: 1) the scientific community; 2) policy makers and public administrations; 3) service providers; 4) users, their families and the general public.

1. *Scientific community.* This audience includes researchers and scholars, in academia and other research institutions, working on social services, in different countries and from several disciplinary perspectives: e.g. social policy, service economy, social economy, urban planning, sociology, and management. Early-Stage Researchers will be given precedence, whenever possible.

2. *Policy makers and public administrations.* This audience involves officials and civil servants involved in designing, monitoring and implementing regulations, policies, and programmes concerning social services, at different government scales: EU, national, regional and local.

3. *Service providers.* This audience includes the variegated galaxy of actual social service providers: from fully public providers to third-sector organisations, from outsourced to independent private providers, and from self-managed to charity initiatives, including hybrid combinations.

4. *Users and the general public.* Users and their families, association of users, and the general public.

H.2 What?

All common tools of dissemination will be used, but the chief method in this Action will be in the form of events, especially *workshops* (as laid out in section E.1.B for a description).

Electronic communication tools

- Nested *e-mail* networks, with varying geometries, will obviously be established, in order to ensure communication among COST participants and among these and non-academic parties. (*Audiences*: COST participants; scientific community; policy makers; service providers)

- A *website*, functioning as the very 'hub' of the network, will also be created, with different sections and functions. Some sections will be public, i.e. accessible by the general public and geared to external communication, for the posting of general information and documents directed to the broader public. All participating countries will have a dedicated section for interaction with local actors. Other sections will be for internal communication, i.e. protected by password, for the posting of internal information and documentation, including a notice board, the calendar of events, a forum, working papers, progress reports, etc. The main language will be English, but some sections might be established in other languages to maximise local dissemination. (*Audiences*: Action participants; scientific community; policy makers; service providers; general public).

Publications

The main findings of the Action will be published in three forms:

- Internal publication of templates and methodological guidelines; working papers and case study reports; progress reports and final reports; proceedings of workshops and conferences. Some of these will be posted on the website. (*Audiences*: Action network; scientific community; policy makers; service providers).

- Edited books and/or articles in peer-reviewed scientific journals. (*Audiences*: scientific community; policy makers; service providers).

- Local, general public-oriented publications, such as news and articles in local newspapers and periodicals. (*Audiences*: policy makers; service providers; users and general public).

Events

Events will be the crucial dissemination method of this Action.

- Local, national and international *workshops*, i.e. meetings with structured presentations, debates, and reporting, will be organised at two levels: a) among research institutions and local policy-makers, service providers, and users, in order to gather and exchange context-specific knowledge; b) among researchers of the network institutions, to share and compare knowledge in progress about the different national/regional contexts. In the workshops involving local actors, methods such as 'EASW' (European Awareness Scenario Workshop) and 'Focus group' will be applied. (*Audiences*: Action participants; scientific community; policy makers; service providers; users and general public).

- National and international *conferences* will also be organised, where findings in progress and the final results of the Action will be publicly presented. (*Audiences*: scientific community; policy makers; service providers; general public).

- Individual or network contributions to other national and international conferences are also envisaged. (*Audiences*: scientific community; policy makers).

Short Term Scientific Missions

STSMs will be a privileged tool for capacity building, especially geared to Early-Stage Researchers. Such exchanges will be planned according to needs and opportunities when the Action is funded.

H.3 How?

The coordination, monitoring and evaluation of the Action's dissemination strategy (Task 4) will be ensured by the Dissemination Board (see section E.1).

As stressed in section D.2, dissemination in this Action goes hand in hand with capacity building and is aimed at involving, as much as possible, local non-academic actors and stakeholders. Therefore, besides the more conventional academic dissemination means (conferences, publications, etc.), the core of the Action's dissemination strategy will be based on: a) opening parts of the Action's website to local actors; and b) involving local actors in some of the WG workshops (and conferences).

The website. The website will be organised in sections with differentiated access. Some sections will be accessible only to participant institutions; others will be 'open' to the stakeholders involved in the Action and still others to the public at large. Among those 'open' to the public, a central section for the dissemination strategy of the Action will be one devoted to hosting case studies, i.e. the 'repository' of both problematic and innovative local experiences in the planning, production and delivery of social services, together with a possible forum for exchanging opinions and news. Another 'open' section will host the Action's deliverables oriented to local actors and the public at large, i.e. selected working reports, conference proceedings, as well as other documentary materials.

The local workshops. These will be the other major interactive dissemination and capacity building method. Especially in Task 2, they will form the basis of trans-disciplinary knowledge exchange and formation. Different types of local actors involved in the planning, production and delivery of social services will be involved, applying 'focus group' and EASW methodologies with the aim of identifying issues and strengths of on-going experiences.

The above dissemination strategy will be carried out throughout the duration of the project and will be updated yearly, on the basis of the annual (self-)evaluation process carried out for the reporting requirements.

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